IMPACT OF SHOPPING CENTERS ON THE FRAGMENTATION OF THE CITY CENTER

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ABSTRACT

IMPACT OF SHOPPING CENTERS ON THE FRAGMENTATION OF THE CITY CENTER

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This study concentrates on the fragmentation process of the city centers. The study suggests that it is not necessarily the planning decisions or the lack of a rigorous planning framework that brings about the fragmentation process. Local and global economic and social circumstances may also give way to fragmentation of the city center. These processes take place through the countenance of developers, city authorities and central government. In this context, the study focuses on the fragmentation process of the city center functions with specific attention to the retail decentralization. The issue is considered within the dilemma between the investor and urban development.

The main concern of the study is to put forward the fragmentation process of the city center of Ankara, as a consequence of the changing economic structure and the decision making processes under certain economic conditions, concentrated on decentralization of organized retail. Within this framework three different methods are used to display the fragmentation process. The first one consider the changes in the urban space; the second one focus on the processes of location and relocation of public buildings; and the third one consider the impacts of the organized retailing on the fragmentation of the center through Armada Shopping Center. The first two methods, which are historical and geographical, demonstrate how this process was formed and the final empirical method quantitatively illustrates the fragmentation process. Doing this, the fragmentation process and the changes in the city center analyzed through the entrepreneurs and the major representatives of the central government and local administrations under the given economic and social structure.

Keywords: Fragmentation Process of City Center, Retail Decentralization, Shopping Center, Ankara

ÖZ

KENT MERKEZLERİNİN ÇÖZÜLME SÜRECİNDE ALIŞVERİŞ MERKEZLERİ

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Bu çalışma kent merkezlerinin çözülme süreci üzerinde yoğunlaşmaktadır. Bu çalışma çözülme sürecini yaratan koşulların sadece planlama kararları ya da zayıf bir planlama çerçevesi sonucu oluşmadığını ileri sürmektedir. Yerel ve küresel ekonomik ve sosyal koşullar da kent merkezlerinin çözülme sürecin varolmasına imkan sağlamışlardır. Çözülme süreçleri yatırımcılar, kentsel idari birimler ve merkezi hükümetlerin desteği ile oluşmuşlardır. Bu bağlamda, bu çalışma kent merkezlerinin çözülme sürecinde perakende sektörünün ademi merkeziyeti üzerinde odaklanmaktadır

Bu çalışma temel olarak Ankara kent merkezinin çözülme sürecinin değişen ekonomik yapı ve belirli ekonomik şartlar altında oluşmuş karar verme süreçlerinin bir sonucu olduğunu organize perakendecilerin ademi merkeziyetine odaklanarak ortaya koymaktadır. Bu çerçeve kapsamında çözülme sürecini gösterebilmek için üç farklı yöntem kullanılmıştır. Bunlardan bir tanesi Ankara'nın mekansal yapısını ve dönüşümünü irdelerken, diğeri kamusal yapıların kentteki yer değiştirme süreçlerini araştırmış ve sonuncusu Armada Alışveriş Merkezi özelinde kent merkezlerinin çözülme sürecinde organize perakendeciliğin etkilerini sorgulamıştır. Tarihi ve coğrafi araştırmalar olan ilk iki yöntem bu çözülme sürecinin nasıl oluştuğunu açıklarken, ampirik bir çalışma olan son yöntem ise bu sürecin nicel yönlerini ortaya çıkarmaktadır. Sonuç olarak bu çalışma ile kent merkezindeki değişim ve çözülme süreci belirli ekonomik ve sosyal yapı içerisinde yerel ve merkezi yönetimler, ve yatırımcı bağlamında ortaya konmuştur.

Anahtar Kelimeler: Kent Merkezinin Çözülme Süreci, Perekendeciliğin Ademi Merkeziyeti, Alışveriş Merkezi, Ankara

To My Family

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CHAPTER 1

INTRODUCTION

Major determinants of urban development are **central and local governments** on and towards the space, **businesses** dynamics, and the **land and property market** activities under certain economic conditions. It is the **competition for** the best **location,** together with the operation of urban **planning** proccess, an urban landscape in which different functions become inscribed in geographical space.

This study concentrates on the fragmentation process of the city centers. The study suggests that it is not necessarily the planning decisions or the lack of a rigorous planning framework that brings about the fragmentation process. **Local** and **global economic and social circumstances** may also give way to fragmentation of the city center. These processes take place through the countenance of developers, city authorities and central government. In this context, the study focuses on the fragmentation process of the city center functions with specific attention to the location, movement and the decentralization of the retail sector activity which is a significant component of the city center. The issue is considered within the dilemma between the investor and urban development.

In the past twenty years almost all cities were affected by the changes in the **national** and **international economic system**. The restructuring of companies, the rapid expansion of amalgamations and assets, and the restless search for low-cost sites and marketing advantages accelerated the movement of the capital among the cities. Parallel to this, the significance of the urban areas has increased within the **globalized economic** and **political system.** The global financial changes reinforced the importance of urban-regional economies and reduced the capacity of national governments to respond to a new balance with traditional policy instruments. Consequently, decisions taken at sub-national level and urban development issues became more important for local and national decision makers in the public and private sectors. This progress can be examined in metropolitan cities of Turkey like Ankara and Istanbul in the last twenty years.

The mobility of national and international capital, the decisions of the real-estate developers and the outcomes of struggles over the use of urban land have become crucial factors in determining the character of urban development through the urban economy. Although it is usually the private sector which is responsible for **real-estate development**, the resources of the **public sector** play a direct role in the development of urban space. The public sector's preference for areas which are equipped with superior infrastructure and enhanced public transportation means and the tendency of workers (employed by the state) to reside in the close surrounding of their working areas are significant factors shaping the development of housing and the service sector. Consequently, private and public institutions, which are in direct contact with the state or municipalities, have influence on the localities of the urban areas.

It is through the act of **planning** that the spatial distribution of different actions is controlled. Urban planning, which is the unique mechanism to direct urban development under these processes, also controls the land and property rights, real-estate interests and markets, and establishes the context of urban development. Furthermore, the planning authorities, often suppressed by political ideas and attitudes, negotiate between different approaches to ensure economic growth. Planning studies, during the inefficient operation of the state and public bodies, are influenced by the conditions of the market. Under these conditions, it is notably the city center which significantly transformed under the influence of the exploiting and profit raising targets of the market.

Considering the different operations and development of local and global processes, the decision making processes do not operate in a single direction. The formation and the development of the city center, in this respect, are not only shaped by the mobility and the concentration of the capital. The preferences of the consumers and the users also contribute to the continuous (re)structuring of the center.

With frequent use of the inhabitants, the **city center** is the core of an urban area. Although the traditional center of a city may be subject to fierce competition with the sub-centers, it usually maintains its strong character (Pacione, 2003). The city center, within the urban theory, is considered as the focus and the most important component of the urban area. While early theoretical studies on urban space focused on the **geographical definition** of the city center, more recent analyses concentrated on its **changing nature**.

The urban planning literature treats the city center in its various conceptualizations. Burgess (1925), Hoyt (1939), Harris and Ullman (1945) and Christaller (1966) consider the **one single** center while Christaller (1966), Lefebvre (1974, 1996) and Castells (1977) focus on the **centrality** of the center which is considered to be one of the basic attribute of the urban settlements. A large number of studies consider the city centers as **social, political and economic cores** of the urban areas (Roebuck, 1974; Hurst, 1975; Holcomb & Beauregard, 1981; Whyte, 1990; Lefebvre, 1996; Sudjic, 1996; Johnson, 1996; Oc & Tiesdel, 1997; Tomalin, 1998; Wooley et.al., 1999; Worpole, 1992). Another group of works underline the **high land value** characteristic of the city centers (Burgess, 1925; Alonso, 1964; Christaller, 1966; Johnson, 1966; Hurst, 1975; Byrne, 2001). Hoyt (1939), Johnson (1996), and Pacione (2003) treat the **accessibility** factor of the center which makes it generally the most accessible area in the metropolitan region. Pahl (1975), Castells (1977), Harvey (1989) and Şengül (2001) views the city center as the reflection of **inter-organizational relations** between main agents and interpret it as **a dense employment node**. Nelson (1969), Akçura (1971), Murphy (1974), Levent (2007) and Gökçe (2008) underlines the **centrality** of the city center being the representative node of urban life and systems, and presenting a major capacity for socio-cultural and communicative relations. These studies also focus on the **concentration** aspect making it one of the most intense areas of the economic activities and the built-up characteristics.

Last but not the least, the **land use** of the CBD is issued in a wide range of urban studies. Hawley (1950), Quinn (1955), Johnson (1957) and Chapin (1967) deal with the **decision making processes** in the city center and interpret it as a **commercial core.** Pacione (2003) and Johnson (1971), on the other hand, takes the city center as an area where once manufacturing concentrated and where **light industry** may still exist. They similarly point to a **high intensity of land use** and see the center as a locus for service industries, business offices and financial institutions where the **limited residential** use is a distinctive feature. In this framework, the land use of the city center is equipped with **business services** (offices, insurance companies, banks, financial institutions, head offices and branches of firms), **professional services** (health services, technical services such as engineering and architecture offices, advocacy, real estate agencies); **private services** (tailors, hairdressers, photographers, opticians); **social services** (public institutions, social services, non-governmental organizations, chambers, unions, education and health facilities); **transport services** (transport terminals, travel agencies, automotive agencies, carting agencies); **producer services** (confectionary, metallic goods production, electronics, printing activities, small production activities); **wholesale services** (wholesaling and warehousing); **entertainment services** (restaurants, cafe-bars, discos, bakeries) and **culture and tourism services** (hotels, guest houses, museums, theatres, cinemas, convention centers, courses and event centers).

This study aims at critical evaluation of the major lines of thought on urban development in general and specifically on the city center development, besides, the urban ecology school which considers urban development as a self-regulated process on the one side and the capital accumulation approach, which claims that urban development is directly determined by the mobility of capital on the other. Urban development, hence, is defined within a dialectical relationship and considered with respect to the transformation processes in the historical context, old planning decisions and the changes in the legal and administrative structure. External factors, similarly, are taken into account. Global mobility of the capital and the state policy to free the mobility within its territory strongly influence the urban balance.

Technological developments, notably the rapid changes in transportation and communication systems reveal the inadequacy of classical urban theories on the explanation of the urban phenomena. Although accessibility still acts as a factor with regards to strengthening the role of the city center, the high level of land prices resulted in the shift of the business areas and organized retail units outside the city center.

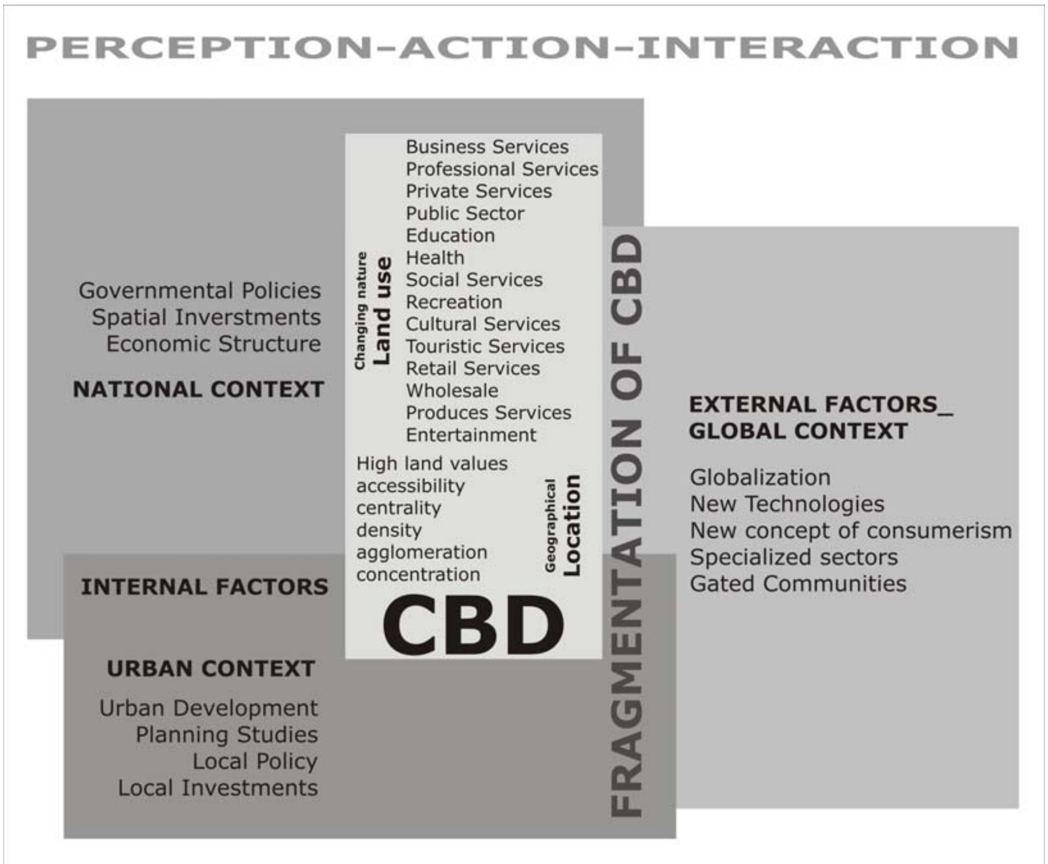


Figure 1.1. Fragmentation Process of CBD

The cities today are shaped with respect to the ideological structure of consumption patterns and on the ideological domain the emphasis of the organization shifted from production to consumption. Capitalism produces consumption goods in principal not for direct use but for the purpose of selling and making profit in the market economy. The continuity and the rise of the production process are possible only through the continuity of the consumption. In this respect, the continuous stimulation of consumption and the creation of further needs are the musts of a capitalist economy. The spaces of production in varying types of functions are shaped by the quality of the production, the use of labor and the size of the market. Hence, the spaces of distribution and consumption in various sizes and scales are formed in order to present the goods and services. In order to augment the production, the spatial and temporal organization should be considered within the consumption processes.

The redefinition of the capitalist economy over the consumption relationships brought about the transformation of the social structure. Social relationships and the changes in the social and cultural structures are taken into account with respect to changing consumption patterns. Consumption, hence, is no longer taken as the simple consequence of the needs, but, owing to the complex forms it takes, is seen as the symbolization of the social disintegration processes.

The changing concept of “consumption” has produced new consumption spaces. The transformation of consumption goods from objects of need to objects of desire brought about a diversification within the social groups represented by different consumption goods. Thus, for us the differentiation in the **consumption spaces** has leaded the social segregation on urban space.

Consequently, organized retail commerce, specifically those addressing to higher income groups, abandoned the city center to be later replaced by facilities and services addressing to lower income groups. Synchronically, the big capital deserted the center for moving either to Istanbul or to the peripheral zones. The shift of the big capital from the center brought about a consequent degradation in the city center.

The continuous and common utilization of the city center by inhabitants, which constituted the existential characteristic of the urban center, was lessened with the rise of the new **shopping centers (**attracting middle and high income groups). The hypermarket and the supermarket, where a variety of goods coexist have constituted the basis of the shopping centers. While the supermarket offers a relatively limited product range of food and domestic goods, the hypermarket brings together a wider collection of products from food and clothing to home accessories and toys. In this sense, the hypermarket’s influence on the city center, although not comparable to that of the shopping center, is worth mentioning.

The greatest influence on the city center has been observed to be the large scale shopping centers. The shopping centers’ accommodation of retail trade and entertainment facilities and their being privately owned public spaces where both social and material exchange is possible distinguish them from other commercial units.

The urban administrations provoke the construction of shopping centers within the limits of the city without thoroughly considering their impacts on the urban center and urban life. Today, in consequence, shopping centers stand as the new public spaces of metropolitan life.

The academic literature often deals with the problematic of the urban sprawl; however, there is no rigorous research on the fragmentation of the central functions. A few works studied the impacts of shopping center development (Davies and Bennison, 1978; Pacione, 1980; Dewar and Watson, 1990; Lorch and Smith, 1993). These studies, however, were either limited to the comparison of the rent prices, the ratio of vacancy and the mix use profiles of the shops in the city center and those in the shopping center; or they focused, based on the consumer and user surveys, on customer profiles and the reason of their preference. Shopping centers, however, are not explicitly considered in the urban scale on the basis of the investor. The Central Place Theory, Location Theory explain the investors' choice for the location of shopping malls; however, the rationale of the stores' settling in the shopping malls are not rigorously taken into consideration. The permanence of a shopping center, which requires the continuous presence of its customers and the stability of the consumption process, is only possible through the operation of the enterprises that it accommodates. The evaluation of shopping malls is, therefore, essential in terms of the investors and the settled brands.

In Turkey, the academic literature on the retail sector is rather new and, consequently, insufficient. Existing works usually considered shopping malls in reference to customer surveys (Aksel, 2000; Erkip, 2003; Tunç, 2003; Erkip, 2005). A number of other studies focused on the spatial distribution of traditional and modern retail commerce on urban space (Kompil & Çelik, 2006; Kompil, 2004). Another group of researchers concentrated on the non-spatial structure of the retail sector with respect to quantitative data (Kumcu & Kumcu, 1987; Boyacı & Tokatlı, 1998; Tokatlı & Özcan, 1998). Finally, some tutors studied shopping centers sociologically through the evaluation of modern retail units from the point of view of the administration and the staff (Tutalar, 2007).

However, the non-academic writings on the retail sector in Turkey have increased dramatically in the recent years. These are usually the reports prepared by certain institutions such as international investment companies, international retailing associations, International Council of Shopping Centers and firms providing counseling services for shopping centers in Turkey. Although these reports present reliable statistical data, they usually have a structure directing and ideologically reverencing the modern retailing sector.

The organized retailing sector has a very short history in Turkey. In the early 1980s, the transition from the import substitution model to a strategy targeting extravert growth triggered the capital accumulation processes notably in the big cities. In this context, the increasing concentration of public and private investments on the Ankara city center is observed to disperse. Migros, which was first introduced in Istanbul in 1956 by state-supported foreign capital and which functioned first in Istanbul in the back of a bus, is today one of the top 250 retailers of the world and it operates with local capital only.

In Turkish academic literature, there is no critical study focusing on the retailing sector in terms of retail sector activity and behaviour based on the investors' point of view in locational preferences. The study aims at fulfilling this gap through the understanding of the investors' behavior in the retail market. The study, consequently, concentrates on plans and targets of the investors, who, instead of creating their own customers, keep the clients from other spaces and who are influential on the urban development to a great extent. To put it other words, the study focuses on the yields and the losses of the modern retail investments both in the center and in the overall city.

1.1. Scope and Objective of the Research

The main concern of the research is to put forward the fragmentation process of the city center of Ankara, as a consequence of the changing economic structure and the decision making processes under certain economic conditions, concentrated on decentralization of organized retail. To support the hypothesis, an empirical study has been made on the Armada Shopping Center which is the one of the out-of-town shopping centers in Ankara.

In this respect, the study is motivated around the following questions:

- Can the shifting of Ankara's central functions out of the city center be regarded as "**fragmentation**" or is it a conscious direction?
- What is the rolw of the planning decisions stand in the fragmentation process of the city center of Ankara?

- **Local administration** – To what extent do the investments of Ankara Metropolitan Municipality affect the fragmentation process?
- To what extent did the **relocation of public buildings** in Ankara affect the fragmentation process?
- When and how did the fragmentation process take place in Ankara?
- Did the economic regards of the central administration and the changes in the laws have influence on the fragmentation process of the Ankara city center?
- What is the role of the **organized retailing sector** and **shopping malls** in the fragmentation of the center?
- Could we follow **different consumption habits** in Ankara with respect to the income-level-based spatial segregation?
- What are the characteristics of the **retailers** settling in the shopping centers?
- What are the reasons behind the success of the shopping centers?
- How do the shopping malls attract the functions and the users from the city center?

Note that the definition of the problem is a significant step in searching solutions and that the thesis aims at introducing certain operational conclusions. The fragmentation process, in this respect, can be prevented with relative measures and interventions in the city centers which did not yet experience a dispersal process. In cities where the fragmentation process has already taken place, the problems resulted in by this process could be transformed into opportunities with relative planning principles and public policies.

Conducting this research in Ankara relies on: being the capital city of Turkey, a remarkable illustration of a plan-based development, the practice of local and global interventions, developments and employments caught to Istanbul, and, last but not the least, having the highest percentage of gross lettable area of shopping centers per person in Turkey are the reasons behind our choice.

In the **second chapter**, the urban development theories are evaluated in terms of the various approaches they provide on the dynamics of the urban development. The theories are taken into account with respect to their positioning the city center and their regard on the fragmentation of the center. In addition, the deficiencies of each theory are evaluated. The overall discussion in this chapter claims that the fragmentation process of the city center can and should be explained by the dialectical evaluation of the urban ecology and the capital accumulation approaches.

In the **third chapter**, a thorough discussion on the definition and content of the concept of “fragmentation” is developed. In this context, we discuss different considerations of the fragmentation notion developed by different urban theories, and we try to demonstrate the resulting characteristics of the city centers experiencing such a process. Besides, we focus on the definition and the scope of the “retail decentralization” which plays an important role on the fragmentation of the city centers. In this context, the new consumption spaces are taken into account with respect to the changing consumption patterns. Finally, the influence of the shopping centers, which are clearly reflecting the physical organization of these new consumption spaces, on the city center, is investigated.

The **fourth chapter** focuses on the spatial development of Ankara city center with respect to the national and international economic transformations and the changes in the legal and administrative structure within the planning process. Ankara, with respect to the structure of the city center, is viewed in three stages:

- Mono-centered city
- Dual-centered city
- Fragmented city center

Within these stages, the structure of the city and the city center is taken into account with respect to their condition during the planning process, the impact of the planning decisions on the city and the center, and the changes in the economic, legal and legislative structures.

The **fifth chapter** evaluates the retail decentralization process in Turkey through the examination of shopping centers and chain markets. In this framework, first, the retail structure in Turkey is studied with the focus on traditional and organized retailing. Then the national and international impacts beneath this transformation are discussed. Turkish shopping centers and chain markets are compared to their European counterparts. Finally, a thorough examination of Ankara chain markets and their influences on the city and especially on the city center is introduced with respect to the data of 2008.

The consumption market in Turkey is considered in the European context as the typologies of the consumption spaces and the location choice criteria in Turkey have similarities with the structure of the retail structure in the European countries. The urban development in Turkey as a developing country, however, is rather different than the cities of the developed countries. There is no doubt that the destructive effects of the spread of the shopping malls in the developing countries are greater than those of the developed countries. In addition to the deficiencies in the legal regulations, the lack of solidarity in cities like Ankara and the instable role of the city center both in the collective memory and in the urban history are significant factors behind this reality.

The **sixth chapter** aims at statistical presenting the fragmentation process in Ankara by the study carried on the Armada Shopping Center. In this respect, the narrative is based on the results of the administration's poll of 2003; on the comparison of the findings of surveys realized with the stores in 2003 and 2008; and on the interview realized with the management of the Armada Shopping Center in 2008.

Finally, in the **evaluation chapter,** the hypothesis about the reasons of the fragmentation process in Ankara city center is either verified or negated through the comparison of the indicators of the fragmentation determined in the theoretical framework to the findings of our research.

1.2. The Framework and the Method of the Study

In this study three different methods are used to display the fragmentation process. The first one will consider the **changes in the urban space**; the second one will focus on the processes of location and **relocation of public buildings**; and the third one will consider the **impacts of the organized retailing** on the fragmentation of the center through examples of new shopping centers. The first two methods, which are historical and geographical, will demonstrate how this process was formed and the final empirical method will quantitatively demonstrate the fragmentation process. Doing this, the fragmentation process and the changes in the city center will be analyzed through the entrepreneurs and the major representatives of the central government and local administrations under the given economic and social structure.

The study, hence, requires the observation of the changes in the city center. The reasons behind the changes in the city and in the center are taken into account with respect to the role of the planning process, the decisions taken and the economic and social framework within which the planning principles were determined.

The **development** and **the change in the urban space** of Ankara are studied with respect to the role of the planning decisions within the national and international economic structure. The study is structured in three periods determined with respect to the spatial structure of the city center. At the origin of the physical problems that have occurred in Ankara in the last years, we see a number of factors: changes in the planning decisions made without the finalization of upper scale (metropolitan) plans; the lack of a theoretical framework and a consistent development perspective; the changes in the legal and administrative structure; the investments on transportation and infrastructure and the (increasing number) of shopping centers are the factors contributing to the fragmentation of the city center.

Ankara, being the capital city, clearly reveals the significant role played by public investment on the employment and economic structure of the city. During the eighty years following the declaration of the capital, the location of public buildings continually changed with respect to the planning decisions as well as the economic instabilities. Today, we see that the majority of public investment located in the city center has abandoned the center to settle out of the center, and some even moved to Istanbul. In this context, the large number of workers detaching from the center, the tendency of the institutions which are in direct contact with the state to settle near by these structures, and the shifting process of public buildings and their actual locations are studied with respect to the fragmentation process of the city center.

The database acquired by TODAİE provided a complete list of addresses of public buildings of Ankara. In the course of a change in the position of public buildings, the reasons of change and the resulting conditions are discussed. This further examination aims at demonstrating that the relocation of public buildings in the city center are not always the consequence of planning decisions and that the planning decisions taken in a given economic structure may result in unplanned developments under different and unforeseen economic conditions. These issues are held in reference to the fragmentation process of the city center.

The changing concept of “shopping”, new consumption habits, and the consequent formation of the shopping centers has brought about **a tension between the city centers and shopping malls**. Today, an average customer tends to prefer the shopping center where there is a high rate of mobility, where the time passes quickly, where there is an huge number of store staff and which is more than just a simple shopping place; to the city centers, where the accessibility is weaker, the infrastructure and superstructure are insufficient, and the urban layout is dense and physically degragated. Here, one can underline that the retailing units settling in the shopping centers are consciously detached from the city center in order to redefine the consumption habits of those living in the city (center), to spatially reinforce the socio-economic segregation, to produce special small-size cities within the city, and to make the inhabitants forget their belongingness to the city.

In this context, the socio-spatial differentiation of the organized retailing sector in Ankara is clarified through the documentation of the organized retailing sector and its influence on the urban space. Considering that supermarkets are the nucleus of hypermarkets and that hypermarkets are the nucleus of shopping malls, the organized retailing sector that is considered in the study comprises of local and national chain supermarkets and hypermarkets. Supermarkets and hypermarkets have similarities in terms of their users, the way that they are used and the location choice mechanism. The localities where supermarkets and hypermarkets are concentrated would be an indicator for the future development of shopping centers. This would provide us with significant clues about the potential urban development scenarios.

In this respect, **each shopping center in Ankara** is studied with respect to the **type of service they provide**, the d**iversity of the products**, their **surrounding area**, the **consequent investments** they attract and their **impact on the development of Ankara**. In this respect, we have seen that shopping centers had both negative and positive effects on the social and spatial structure of the city. It is, however, clear that these shopping centers, away from being the mere consequence of urban planning decisions, directed the urban development to a significant extent.

The fieldwork method realized in the **Armada Shopping Center** demonstrates that the out-of-town shopping centers have significant effect on the fragmentation of the city center. In 2003, owing to its location and the size of the property, Armada Shopping

Center was thought to be an alternative to the city center. Armada was awarded as the best shopping mall of the Europe in 2004 and today it is regarded as the third best shopping center in Turkey.

The study carried on Armada consists of the integration of three separate studies. The **first group** presents the comparative findings of the surveys made with the firms (shop owners) in Armada both in the first year of Armada's establishment and then in 2008. Year 2002 is crucial as it is the year that Armada was launched and there were only ten shopping centers in Ankara none of which were greater than Armada. The year 2008, however, is important as the total number of the shopping centers in Ankara have reaced 29, among which four of them are at least three times bigger than Armada. With this comparative study, the economic conditions leading the firms to settle in Armada are sought. In addition, the firms' evaluation of the Armada Shopping Center is also discussed.

In the **second group**, there is an interview carried on the Armada Management (in 2008) about the determination of the tenants, the methods of administration, customer profiles, renting values and the actual and future market of shopping centers in Ankara.

The **last section** presents, thanks to the permission of the Management of the Armada Shopping Center Management to be used in this study, the survey realized in 2003 and which consists of the polls of an approximately thousand customers.

The Limitations of the Survey

This study considers Ankara only in terms of the organized retailing sector. However, in order to understand the effects of shopping centers on the city centers, a detailed research on inner city retailing is required. Within the context of such a study, each retailing unit in the city center should be investigated in terms of their location, function, size, number of staff, year of the establishment and also the size of the capital should be considered (not the registered capital to Ankara Chamber of Commerce but their endorsements). The data should later be compared to the totality of the shopping centers. Unfortunately, the time period determined for a PhD thesis limits the scope of investigation. In addition, the changes and the transformation of the city centers are so fast that even during the time that they are researched and documented, the data turns out to be changed.

Armada, at the beginning of the research, was the biggest out-of-town shopping center in Ankara and, taken its potential influence on the city center, was decided to be for the object of the study. However, towards the end of our study, the number of the shopping centers in Ankara increased to a significant extent and bigger shopping malls appeared. The choice of another shopping center would surely lead us to different conclusions.

CHAPTER 2

THEORETICAL BACKGROUND

In this chapter urban development theories are evaluated in terms of the various approaches they provide on the dynamics of the urban development. The theories are taken into account with respect to their theorizing the city center regarding on the fragmentation. In addition, the deficiencies of each theory are evaluated. The overall discussion of the urban theories claims that the fragmentation process of the city center can and should be explained by the dialectical evaluation of the urban ecology and the capital accumulation approaches.

Also a thorough discussion on the definition and content of the concept of "fragmentation" is developed within this chapter. In this context, the different considerations of the fragmentation notion were developed, and this research tries to demonstrate the resulting characteristics of the city centers experiencing such a process. Besides, the study focus on the definition and the scope of the "retail decentralization" which plays an important role on the fragmentation of the city centers. In this context, the new consumption spaces are taken into account with respect to the changing consumption patterns. Finally, the influence of the shopping centers, which are clearly reflecting the physical organization of these new consumption spaces, on the city center is investigated.

2.1. Urban Development Theories

2.1.1. Classical Theories

According to the classical location theories, the economic rent in cities used to explain the structure of cities and their tendency to create powerful and privileged centers of commerce. The spatial form of cities was an outcome of competing demand for space, and land uses changed form commercial, to industrial to residential at the margins of ability of different users to "bid" for the land. Alonso (1964) and Muth (1969) underlied the thesis of **the monocentric city as the outcome of competition for accessibility** (Clark, 2003). The **CBD** was the centre of business and it was the most accessible point in the city with the densest gradients and the highest land values. One of the most severe criticisms of the **classical location theories** referred to their economic bias and consequent neglect of cultural influences on urban land use patterns. (Pacione, M., 2003)

Equally the geographical location of settlements relative to each other was determined by the spatial extents of consumer markets for different goods (Bridge and Watson, 2003).

Land Use Theory

Von Thunen's (1826) conceptual model of the relationship between markets, productions, and transportation can be seen as one of the earliest approaches to spatial economics. His model was created before industrialization as a model of **agriculture** and is based on the following assumptions:

- A community that is **self sufficient** and has **no interactions** with the outside
- A land surrounded by an unoccupied, unused land.
- The land is entirely **homogeneous**, having no rivers, mountains or other obstructions, and also the soil, climate and all other factors on agriculture are the same
- There are **no transport infrastructure**s such as roads or rivers.
- Farmers act to **maximize profits**

Von Thunen hypothesized that a pattern of rings around the city would develop. The land within the closest ring around the market will produce products that are profitable in the market. This model is an excellent illustration of the balance between land cost and transportation costs. As the distance from the central market increases, the profit that would be gained from a product decreases. Equilibrium is met where the profit of one land use outweighs the profit of another. At this point, the land use changes.

This approach has also been central to modern applications of understanding urban land use patterns (Alonso, 1964) urban sprawl (Sinclair, 1967) and other spatial studies where transportation costs have an influence over decisions on land use.

Location Theory

With the Location Theory in 1909, Weber put forth the first developed general theory of **industrial location**. His model took into account several spatial factors for finding the optimal location and minimal cost for manufacturing plants. He focused on the problem as a t**ransport-cost minimization problem** with the **lower cost labor**, **agglomeration**[1] and **deglommeration**[2]. Besides Weber emphasized, and demonstrated that these rules of location are insufficient unless tested by real-world local, sociological, and political conditions.

Hoover (1948 in Vom Hofe & Chen, 2006) explained that **agglomeration** of firms and businesses is the most important among all listed by Weber and **location** becomes the most important agglomeration force. Hoover identified three types of economic agglomeration: economies of localization, economies of urbanization, and internal returns to scale. **Economies of localization** are external to firms and business within the same industrial sector. **Economies of urbanization** explains geographic proximity of establishments across different industry sectors by emphasizing the beneficial effects to firms and businesses from the existence of large, diverse markets predominant in urban areas. **Internal returns to scale** accrue through the existence of large and specialized factors of production (Vom Hofe & Chen, 2006).

Isard et al. (1956) actually invented the expression industrial **complex**; one specific product manufactured by multiple activities, quantifying the cost advantage of

[1] Agglomeration occurs when there is sufficient demand for support services for the company and labor force with the supporting companies, that build and service machines and financial services, prefer closer contact with their customers.
[2] Deglommeration occurs when companies and services leave because of over concentration of industries, or shortages of labor, capital, affordable land, etc.

combining a region's industrial activities characterized by intensive forward and backward input-output linkages. Moses (1958) developed the location theory where the **technical factor** are variable which defined by the firm's production function.

Central Place Theory

Central place theory describes the location of **retail and service**. The theory also explains the hierarchy among city centers. Christaller noted three different arrangements of central places according to the **marketing**, the **transportation** and the **administration**. Which means the central place theory vary with local factors, technological improvement and preference of consumers and managers.

Central place theory based on a number of **assumptions** such as:

- an **homogeneous**, limitless surface
- an **evenly distributed population**
- **evenly distributed resources**
- all consumers have a **similar purchasing power** and **similar tastes**
- **equal transportation cost** in all directions
- **no excess profits**

Spatial Competition and Competitive Differentiation

Alonso (1960) model gives **land use, rent, intensity of land use, population** and **employment** as a function of distance to the CBD of the city as a solution of an **economic equilibrium for the market for space**. The different land uses compete with one and other for the most accessible land within the CBD. The amount that they are willing to pay is called **Bid Rent**.

Different forms of land use generate different bid-rent curves. Bid-rent theory shows that each land-user will outbid the others at certain points. At that point, the successful, **highest competing land** use will predominate, and the theory posits a series of **land-use rings around the CBD**. It is also worthy to note that since **transport costs** rise with distance from the **CBD**, and thus land prices increase closer to the CBD rents generally tend to fall correspondingly and centrally located land tend to be the most **intensively used ones**.

Bid rent theory a first achieved recognition in a retailing context from the early work of Haig and modified by Hotelling (1929). According to Haig (1926) all urban sites are occupied by the activity capable of paying the highest rentals, and land is thereby put to its "**highest and best" use** (Skogster, 2006). Hotelling suggested that competition between sellers for markets would lead to concentration of sellers with **minimum differentiation** in the center. Hotelling's approach to the problem was to model firms in sequence, **choosing locations then prices**. Then, the solution of the spatial problem depends critically on the nature of **transport costs and pricing policy** (Kilkenny & Thisse, 1999).

Law of Retail Gravitation

Reilly based his "Law of Retail Gravitation", on an analogy with Newtonian physics linked with retail geography, and many models of shopping behavior have been developed based on the concept of retail gravitation.

The basic problem with the original gravity model is that the **population** and **travel distance variables** (Brown 1989; Skogster, 2006). Reilly's law of retail gravitation, stating that a centre tends to attract retail trade from a customer located in its hinterland in proportion to its population and in inverse proportion to the distance between them.

The model relate the interaction (shopping trips or expenditures) between the retailer and the consumer to the characteristics of the store, the characteristics of the consumer. The model integrates **space (**store size) **via a distance variable**.

The single most significant post-war contribution to spatial interaction theory came from Huff (1963). He believed that consumers patronize competing shopping areas as the basis of their overall "**utility**" (Skogster, 2006).

Clustering among heterogeneous retailers facilitates **multi-purpose shopping** behavior of consumers to reduce total travel costs, and clustering of homogeneous retailers facilitates **comparison shopping** behavior (Eppli and Benjamin, 1994). Studies have established the importance of these retailer and consumer behaviors in the choice of retail shopping trips (Eppli andBenjamin, 1994).

2.1.2. Urban Ecology

According to **urban ecology**, spatial relations are the analytical basis for understanding urban systems, including the physical shape of cities, relations among people, and economic and social relations between urban areas. Both buyers and sellers are autonomous individuals: property entrepreneurs try to satisfy space needs of consumers, and consumers "vote" their preferences by choosing among products, always free to substitute one product for another if price, quality, or utility should change. E**cologists** generally avoid "any connection between urban social structures and the general class structure of the society, and between the urbanization process and the capital accumulation process." In the urban context, **dominance** was understood not in terms of a social group as such but rather by reference to the component of urban space which commanded the highest land values: **the central business district**.

Concentric Model

This model is conceptually a direct adaptation of the Von Thunen's model to urban land use (Carter, 1995). Although the purpose of the Burgess concentric model (1925) was to analyze **social classes**, it recognized that **transportation** and **mobility** were important factors behind the spatial organization of urban areas. The formal land use representation of this model is derived from commuting distance from the CBD, creating concentric circles. Each circle represents a specific socioeconomic urban landscape. The further from the CBD is a better quality of housing in a longer transportation time.

Competition among land uses for space resulted in the **invasion** of the most desired parts of a city and eventually the **succession** of existing land uses by a more dominant activity. Under free-market conditions, certain parts of the city would be occupied by the function that could maximize use of the site (Pacione, M., 2003).

According to this concentric model, a city is divided in six concentric zones:

1. **central business district** (CBD) is where most of the tertiary employment is located and where the urban transport infrastructure is converging, making this zone the most accessible.
2. **factory zone** is adjacent to the CBD where many industrial activities locate to take advantage of nearby labor and markets.

3. **zone in transition** is gradually been reconverted to other uses by expanding manufacturing / industrial activities. It contains the poorest segment of the urban population.
4. **zone of workingmen's homes** dominated by the working class and those who were able to move away from the previous zone.
5. **residential zone of middle-class homes** is where higher quality housing linked with longer commuting costs.
6. **commuter zone of the upper class** where high class and expensive housing in a rural, suburbanized, setting where the transportation costs are the highest (Beauregard, 2007).

It is important that the concentric zone model was proposed as **an ideal type**, not as a representation of reality on the basis of a particular set of economic and political circumstances. In particular, the model assumes **private ownership of property** and the **absence of any city planning constraints**. (Pacione, M., 2003)

Sector Land Use Model

According to the model of Hoyt (1939) the residential areas was not a random distribution, nor sharply defined rectangular areas or concentric circles, but rather **sectors**. Thus, the effect of direction and time was added to the effect of distance. **Transport corridors** have directional effect on land uses. Cities grow along major axis. The sector representation also includes concentric transitional processes observed by Burgess, with outward change occurs only within the sectors. The whole sector does not have to be geographically or socially similar (Pacione, M., 2003).

A major weakness of the theory is that it largely **ignores land uses other than residential**; it places **too much emphasis on the economic characteristics** of area, ignoring other important factors as race and ethnicity (Pacione, M., 2003, 134).

Multiple Nuclei Land Use Model

Harris and Ullman (1945) introduced a more effective generalization of urban land uses. The model observed that most large cities do not grow around a single CBD but are formed by the progressive integration of a number of separate nuclei (Pacione, M., 2003). The location and growth of these multiple nuclei are determined by a number of controlling factors:

- **Differential accessibility**. Certain activities require specialized facilities.
- **Land use compatibility**. Similar activities group together since proximity implies improved interactions through the process of economies of agglomeration.
- **Land use incompatibility**. Some activities repel each-other owing to negative externality effects.
- **Location suitability**. Some activities cannot afford the rent of the optimal site for their location.

Harris and Ullman multiple nuclei model was the first to represent the **fragmentation of urban areas**, specialized functions as well as **suburbanization**.

Hybrid Model

Hybrid model tried to include the concentric, sector and multiple nuclei models. They integrate the strengths of each approach since none of these appear to provide a completely satisfactory explanation. Thus, hybrid models, such as that developed by Isard (1955), illustrates that some urban land uses are oriented along major transport axis (sectors), while others, notably industrial and commercial, are located in nuclei where they reach both scale and agglomeration economies (Carter, 1995).

2.1.3. Marxist Theories

The Marxian analysis of the spatial division of labor suggests that no particular pattern of urban development is inevitably designed, somehow deterministically cast in a general spatial form. Spatial forms are conditioned, rather, by the particular mode of production dominating the society under study; they are shaped by **endogenous political and economic forces**. (Tabb and Sawers, 1978).

Cities are concentrated **centers of exploitation** and the class- based extraction of surplus value form workers. They also act as **coordination centers** for the control investment between the various circuits of capital in commodity production. Indeed much of the built form of the city itself is an outcome of the **second circuit of capital.** Rent is seen as a social relation that is an outcome of the unequal struggle between landowners and land users. (Bridge and Watson, 2003). The structure is emerging as the result of the interaction of capitalist decisions about location in favor of profit and individual choices. And this locational choice emerges form of cities. (Clark, 2003)

David Harvey (1973, 1985, 1989) has had a profound effect on the interpretation of capitalism and the role of cities in capitalist accumulation. Harvey has argued that cities have distinctive roles in the **circulation of capital**. Harvey (1989) envisaged three circuits of capital:

- the primary circuit refers to the structure of relations in the production process
- the secondary circuit involves investments in fixed capital, such as the built environment, in the expectation realizing profits either in the form of rental income form the use value of the building or the enhanced future exchange value of the building
- the tertiary circuit involves investment in science and technology that leads to increase in productivity or investment in improving labour capacity through education or health expenditure.

There is a limit to the process of capital transfer from the primary to secondary circuits. When this point is reached, investments become unproductive and the exchange value of capital put into the built environment is reduced or in some instances lost completely.

According to Pickvance (1998) the starting point of all Marxist theories of urban politics is the view that urban political institutions are part of the **state apparatus**. The state is seen as providing the general prerequisites of production which range from a legal system, a economic system and communications and transport systems to a healthy labor force with the skills and motivation needed by employers. And also the state is acceded as maintaining social order by the creation of institutions to contain social conflict, the diffusion of supportive images and attitudes, the introduction of policies containing “concessions” to subordinate classes, and the creation of repressive institutions. (Pickvance, 1998)

Political Economy Approach

The political economy approach highlights the impact that economic and political processes located outside the territory of any particular city have on its internal structure and development (Pacione, 2003). Political economy most commonly refers to **interdisciplinary studies** drawing upon economics, law, and political science in explaining how political institutions, the political environment, and the economic system influence each other to explain the **politico-economic behavior of a country**. The theory becomes a successful tool in combating the complex and serious issues threatening to invalidate the rewards of liberalization and globalization.

Uneven Development Theory

The basis of the uneven development theory is the inherently **unequal international exchange** (Gilpin, 1987; Roxborough, 1979).The international capitalist system, through both foreign trade and investment, systematically favors certain types of countries over others, as well as certain types of workers over others. Over time, the gap between the developed countries and the 'underdeveloped countries becomes greater (Schuler et.al., 2005).

2.1.4. Post-Structuralist Theories

World Systems Theory

World-system theory explains the dynamics of the "capitalist world economy" as a "total social system" (Martínez-Vela, 2001). The world-system theory argues that there were not two distinct economic sectors, but that both were merely parts of a wider whole: the world capitalist economic system (Worsley, 1979).

Wallerstein (1974) said that a world-system is a "multicultural territorial division of labor in which the production and exchange o basic goods and raw materials is necessary for the everyday life of its inhabitants." This division of labor refers to the forces and relations of production of the world economy as a whole and it leads to the existence of two interdependent regions: **core** and **periphery** (Martínez-Vela, 2001). The world fell into three groupings – a small set of core nations that exploited a larger set of periphery and semi-periphery nations, the semi-periphery nations themselves exploiting the periphery – all this such that wealth and power was concentrated in the hands of 'the owners of the means of production' in core nations. (Groome, 2007)

Developed countries are the core, and the less developed are in the periphery. The differential strength of the multiple states within the system is crucial to maintain the system as a whole, because strong states reinforce and increase the differential flow of surplus to the core zone (Skocpol, 1977). This is what Wallerstein called **unequal**

exchange, the systematic transfer of surplus from semiproletarian sectors in the periphery to the high-technology, industrialized core (Goldfrank, 2000; Martínez-Vela, 2001)

Wallerstein argued that the **state apparatus** had become subverted to this end – acting as guarantor to the rights of ownership, property and free exchange that Marxist's believed made exploitation possible (Groome, 2007). The State, acted as the bridge between foreign and local capital, mobilized capital and controlled labor. In this alliance, it was the multinational corporation which was predominant.

Urban Growth Machines

Basic hypothesis of urban growth "all capitalist places are the activists who push hard to alter how markets function, how prices are set, and how lives are affected" (Logan and Molotch, 1987). The model tries to explain the city as a **meeting ground of use and exchange values**. The model tries to show how **human activism** is a force in cities.

Logan and Molotch see places as vital units which should be the basis not only for carrying on a life but also for exchange in a market. The conflict between use and exchange values in cities determines the shape of the cities and the distribution of people. In light of this tension the political dynamics of cities and regions, the inequalities in and between places can be understood.

Although the connection to place can vary in intensity for different class, age, gender and ethic groups, individual relationships to place are often characterized by intense feelings and commitments appropriate to long-term and multifaceted social and material attachments. Place inequality is both cause and consequence of differences among places.

Logan and Molotch make three general observations about capitalists' attachments to place. First, the satisfaction that capitalists derive form place is their **profitability**. Second, capitalists **move** to another place if the conditions in one place cease to be appropriate. Finally, capitalists' **use of place is less fragil**e than that of residents.

According to the Urban Growth Theory exchange values form place appears as "**rent**".

- Rent levels are based on the location of a property (Losch, 1954).

- Rent amount is driven by competitive bidding that the future price will be greater than the present one.
- The state sustains the commodity status of land with government "regulation".

Because of the limited amount of mobile capital, the growth apparatus in each area must compete with that of other areas to attract scare investment. This contest goes on at all geopolitical levels, with competitive systems nested within one another.

Logan and Molotch argue that the decision- making system works to the advantage of the most powerful and the detriment of the least powerful (Harding, 1998). They also emphasize that the activism of the entrepreneurs is and has always been a critical force in shaping the urban system, including the rise and fall of given places.

Regulation Theories

Regulation theory emphasizes the importance of economic and extra-economic institutions in economic development (Skrypietz, 2003), with the accumulation of capital being influenced by state and non-state institutions, and interactions between agents within the economic system (Dana, 2005). The objective of this approach is to develop diverse strategies that are suited to respective social structure and consequently lead to a maximizing of economic development for both distinctive economies as well as the general economy. The modes of development that emerge can reflect the history, values and cultural aspects, and the objectives of the people involved (Buckingham, 2005)

Urban Morphology Approach

The urban morphology approach emphasizes the physical form changes of a city over time, and the differences between cities. A range of subsequent work in urban morphology attempted to grapple with what works, and what is possible in the urban design arena. These are chiefly of interest here for the introduction of mathematical tools into the realm of urban morphology, in particular graph theory and set theory. More often applied in practice is a body of work known as '**space syntax**' (Hillier & Hanson 1984, Hillier, Penn, Hanson, Grajewski & Xu 1993). This is also based on a graph representation of cities as systems of open space. Simple structural measures of the resulting graphs allow the structure of a city to be described.

There is a general understanding that the two are inter-related: **urban structure** influences the requirement for new forms and affects the social processes which occur; and the **social processes** occurring in a city in turn affect the forms which emerge. However, morphogenetics is hampered by the methods employed: these are not a great deal different from the various structural approaches, and they are difficult to generalise, because the descriptive tools needed to recognise similar outcomes in spatially distinct contexts are lacking. Even so, detailed historical surveys do reveal something about the way in which structures have evolved.

Whatever the merits of the various approaches discussed here, none of them attempts explicitly to relate urban spatial structure to urban social or economic processes, or to investigate the likely impact of changes in spatial structure on future dynamic outcomes in the urban system.

System Approach

Top-down approach: Related mainly to the activity of governments and/or institutions when introducing new regulations, as well as when reducing regulatory and procedural impediments. This approach considers the flow of capital from the investors to the region and the flow of resources back to the investors or capitalists (Terefe, 2008). It promotes regulation and building codes, promotes energy-efficient transportation, considers short-term and long term external environmental impacts and costs of the acquisition of new resources (Pagani, 1996)

Bottom-up approach: Organizing the needs of a community and preparing the policies which comply with these needs. It argues that decision and power should be as close to the bottom as possible rather than coming from outside. The prominent limitation of this approach is that, it is not easy to carry out in the sense, one can't keep the interest of all. On the other hand, it requires a considerable amount of time and other resources while analyzing and investigating the different aspects of a project on a particular group of people or society. (Terefe, 2008). It establishes a neighborhood participatory planning process, encourage a shift towards transit, encourages environmental stewardship in meeting urban utility service needs a (Pagani, 1996)

Demand-side approach: concerns the end-uses of citizens and their needs, promotes livable residential development compatible with the desired commercial function, facilitates mobility and access to public transportation, to the greatest number of services, jobs, educational opportunities, etc. (Pagani, 1996)

Supply-side approach: refers to the capability of the market to organize the production of goods and technologies which respond to consumers' needs, provides a mix of housing types attractive and affordable to a huge diversity, provides a range of viable transportation alternatives, provides reliable energy services at the lowest costs (Pagani, 1996)

2.1.5. Post-Modernist Approaches

While Dear and Flusty (1998) argue for new models and new paradigms for emerging urban forms, there is a strong case to be made for revising the models. New models of urban structures have emerged based on the assumption that metropolitan areas are increasingly decentralized, central business districts becoming less important in terms of employment and new subcenters emerging at the edge of cities. It is clear that **the monocentric model of the city is no longer relevant but equally surely the notions of accessibility and economic competition still exist**. (Clark, 2003)

In the last decade considerable empirical research on urban spatial structure has focused on the following schemes: transitions from monocentric to polycentric density patterns, the formation of "edge city", polycentricity or dispersion of the identification of employment centres (Parolin & Kamara, 2003).

Edge City

The Edge City Concept which was put forward by Joel Garreau (1991) is an American term for a relatively new concentration of business, shopping, and entertainment outside a traditional urban area in what had recently been a residential suburb or semi-rural community. Garreau argues that the edge city has become the standard form of urban growth worldwide.

Garreau established five parameters for a place to be considered an edge city:

- containing a **minimum of five million square feet of leasable office space**
- holding at least **six hundred thousand square feet of retail space**

- **primarily working locations** with populations which expanded during work days, rather than as residential suburbs
- **a single end destination** for mixed use-jobs, shopping and entertainment
- **rural or residential as little as thirty years ago**.

Garreau suggests the Edge City as an outgrowth of advances in transportation and communications which have freed both people and activities from the need to focus upon large central cities (1991). Garreau ignores the fundamentally de-centered or multicentered nature of these emerging regions. His criteria do not permit us to draw boundaries around edge cities or to conceptualize relationships among these "new downtowns" (Kling et.al., 1995).

The increasing spread of the large urban areas necessarily led to a dispersal of new services, especially shopping and associated consumer services, insurance, banking and medical services. These services, as services in the past, clustered in concentrated locations. Because these new services are located in reference to accessibility by the car, so many of the edge cities take place at the conjunction of interstate highways or at the intersection of important urban throughways. **Accessibility** is still as powerful a force in creating and sustaining the new nodes as it was in creating the dominance of the central business district in the early decades of the twentieth century. (Clark, 2003)

The Polycentric Model

Polycentrism is the principle of the city with no single centre, but many. The rise of edge cities has made the monocentric city and the exponential density function increasingly irrelevant for explaining urban patterns. There are two explanations for the growth of polycentric cities: one is a **natural evolution theory** which states that decentralization has been driven largely by transportation advances; the second emphasizes the role of **social and fiscal problems of central cities**.

Urban form has evolved rapidly from the urban form where economic functions are found predominately in the central business district (Clark, 2003). The emergence of polycentric cities and the continued expansion of that form suggest the future role of city center may simply be as one node among a number in a metropolitan area without a predominant place in the metropolitan hierarchy. City centers become one of a number of competing locations.

The structure is emerging as the result of the interplay of capitalist decisions about **profit** and **individual choices** about location. The complex interplay of capital and choice is a central element of the emergence of the form of cities in the next century (Clark, 2003)

Urban Sprawl

Sprawl has been and remains a problematic aspect of metropolitan growth and development. Despite over 50 years of experience with this phenomenon, there is still no agreed definition of sprawl. The mostly used definition for term "urban sprawl" is to describe an urban area whose residents have moved farther and farther form the central city. Sprawl is likely to be less of a problem in an urban area whose suburban jobs are concentrated in subcentres. (McMillen, 2001)

The key manifestations of sprawl: endless cities, fuzzy boundaries between city and countryside, a polycentric urban structure, ribbons and commercial strips, scattered development, and the fragmentation of open space, among others. (Angel et.al., 2007)

The key characterizations of urban sprawl in the literature are:

- The extension of the area of cities beyond the walkable range
- Emergence of 'endless' cities;
- Low density;
- Less centralization;
- The diminished contiguity of the built-up areas of cities and the fragmentation of open space in and around them;
- Automobile-dependent urban growth (Ewing 1994; Downs 1999; Angel et.al., 2007; Wassmer, 2002; Schiller, 2004)

Sprawl development consists of **three basic spatial forms**: (Harvey and Clark 1971)

- **Low-density sprawl** is the consumptive use of land for urban purposes along the margins of existing metropolitan areas. This type of sprawl is supported by piecemeal extensions of basic urban infrastructures.
- **Ribbon sprawl** is development that follows major transportation corridors outward from urban cores.

- **Leapfrog development** is a discontinuous pattern of urbanization, with patches of developed lands that are widely separated from each other and from the boundaries, albeit blurred in cases, of recognized urbanized areas.

There are both social and economic impacts of the urban sprawl: Providing housing opportunities; increasing the affordability of housing in both suburbs and cities; loss of community spirit and values; less leisure time; traffic congestion and longer commuting times; higher costs of providing infrastructure, reduced worker productivity; ugly, monotonous suburban landscapes; loss of a sense of place; marked spatial disparities in wealth between cities and suburbs; land development patterns making the establishment and use of mass transit systems difficult. (Bolioli, 2001)

2.2. Context of Fragmentation Respect to Retail Decentralization

2.2.1. Definition and Content of "Fragmentation"

Fragmentation with its dictionary meaning is atomization; separating something into parts; the disintegration of social norms governing behavior, thought and social relationships (Webster's Dictionary, Oxford Dictionary, Babylon Dictionary). Within this study fragmentation refers to the lack of relations between the groupings of the society on the lines of a common culture, income level, or other common interests. This gap between the groups might be social, indicating poor interrelationships among each other; economical, based on structural inequalities; institutional, in terms of formal and specific political, occupational, educative or associative organizations and/or geographic implying regional or residential concentration.

Urban fragmentation lies at the heart of many problems of modern cities. Urban fragmentation produces enclaves rather than communities spread in vast patterns of isolated and segregated suburban areas. Residential areas are isolated from employment areas. Office parks and industrial assets are segregated (Butterworth, 2004). The increasing ownership of automobile, along with urban-related spread is leading to an ever greater fragmentation of cities, which also include various malfunctions that go with it.

Several processes cause urban fragmentation:

- **globalisation**, i.e. growing competition between cities due to the aggravating situation to locate headquarters, new types of services (e.g. financial services), and to attract corresponding human capital as the panacea for future growth,
- **regulation,** the changing role of agencies and activities within the urban system,
- **technology**-logics and logistics, e.g. the process of accelerating diffusion of information and communication technologies leading to new types of business and services and highly diverse patterns at the intra- and inter-regional level (Castells, 1997),
- reframing change in **economic organisations**, i.e. organisational change is not conceptualised as a punctual, but as an ongoing process embedded in a context of socio-economic complexity,
- **regionalisation processes** on both the international level as well as the national level (e.g. city regions, regional milieus and clusters)
- **suburbanization** of population
    - Central city versus suburbs in concept versus practice
    - Location by sector
- **employment subcenters**
    - the meaning and characteristics
- **retail decentralization**

When urban fragmentation is not addressed early in **planning studies** and **policy making**, city centers become under-developed, under-used and unsafe (Butterworth, 2004). They lose the ability to be the **one,** and to survive their economic, social and political life. The declining status of the city center as a **focus** for retail, business, entertainment and cultural activities has been a common feature of most advanced countries.

With respect to the reasons of fragmentation of the city center, Kumar (1990) has insisted on **decentralization**; investigating the impacts of **technological development** on urban form and travel behaviour. Others correlate **land values** with decentralization.

Theoretical models of urban structure are based on the assumption that all jobs are located in the central business district. The transformation of the economy away from manufacturing has stimulated the growth of the city center. The **employment subcenters** have been formed based on office employment, research & development centers, communication and head quarters associated with **increased car ownership** and transportation investments.

Figure 2.1. Employment subcenter in Söğütözü

At the same time, the **suburbanisation** of the middle class from the inner suburbs, replaced by lower- status concentrations of ethnic minorities has reduced both the spending power of the immediate market and the attractions of the central city for affluent suburbanities. In fact, the perceived physical and social malaise of the inner cities has been widely considered to be a potent force contributing to the process of the decline (Jacobs, 1961; Thomas and Bromley, 2000)

Figure 2.2. Gated communities (Source: Personal Archive)

The competitive impact of **retail decentralisation** has resulted frequently in either the **loss of existing retail**, **office** and **entertainment facilities** from the city centers or the **failure to attract** new investment and people. One of the most important reasons behind this development can be linked to the continually developing large **shopping centers** on the perimeters of the city.

> "Many city centers in Britain, now display evidence of **commercial decline**. This is characterised by **long-term vacancies**, **lower-status stores** replacing market leaders, the emergence of charity shops and the development of air of dilapidation, all features which are most evident in locations peripheral of the centers." (Thomas and Bromley, 2000, 1405)

2.2.2. Context and Scope of Retail Decentralization

The most important element of fragmentation of the city center has to be analysed through the tendencies of allocation of **retail subcenters**. The planned shopping centers have been the dominant elements in the process of retail change affecting the cities. Attention should be devoted to the growth and nature of **out-of-town shopping centers** and the impact of this decentralisation on the central areas. The growth of shopping centers, especially as they have moved out of city centers, has been controversial. The city centers cannot compete with the **out-of-town shopping centers** which represent a modern lifestyle and gain interest by all types of social groups (Janoschka, 2004).

Changes in the urban retail structure have been driven by a range of economic and social forces. Retail decentralization has resulted from the effects of **market forces** which have been characterized by a general process of decentralisation reflected in the relative decline of retail facilities in the inner city and expansion of trade in the suburbs. It brings the structural change of retail establishments from small independent shops to supermarkets and from hypermarkets to **shopping centers**.

"The adverse impact of retail suburbanization on the city center was characterised by Berry et.al. (1963) as "**commercial blight**". The greatest competitive impact of retail suburbanisation was felt by the larger metropolitan areas in which the central area lost the bulk of its "**external**" market and became increasingly dependent on an "**internal**" market comprising the poor, elderly, rural residents" (Pacione, 2001, 235).

Another important factor underlying change in the urban retail structure has been the widespread **suburbanisation** of population. In general it has been the younger, richer and more mobile elements of the society that have migrated to the suburbs, creating new, large sources of demand in areas where few shopping facilities existed previously.

Another factor, the **changing consumer attitudes** and expectations, as a general demand for more convenience and comfort in shopping which newer rather than older centers can satisfy more readily by providing one-stop shopping in environmentally friendly malls for car- borne consumers.

Time constraints imposed on shopping, particularly for women engaged in full –time employment and **increasing purchasing power** created by additions to household incomes are the two major implications on consumer behaviour. The growth in **car ownership** has been another major factor in the trend towards less frequent shopping trips.

2.2.2.1. Changing Pattern of Consumption

As today's consumers, are shopping in two categories: "**needs**" (satisfaction) and "**wants**" (desire) (Campbell, 1998). "Needs" shopping is immediately associated with food shopping and survival. It is a matter of routine; it is repetitious and predictable. "Wants" shopping can only be considered when "needs" have been satisfied. "Wants" shopping is personal, enjoyable, indulgent and exciting (Aksel, 2000).

People actually doing the shopping are not only **shopping for** literal forms of consumption but are also **shopping around** to browse and look around sometimes for needs, sometimes for wants (Hornbeck, 1957; Shields, 1992).

Shopping can be viewed as a significant **public behavior**. Consumption acts as a bridge between the individual and his/her experience of the urban environment (Miles and Paddison, 1981). Henceforth consumption plays a major role in the **construction of urban life** in everyday contexts (Miles, 1998, Uçkan, 1999). Solal (1999) and Baudrillard (1988) determine shopping as a **social activity,** a **specific mode of socialization.**

Throughout the world, shopping has always been and still is an important part of the daily life of the family (Redstone, 1973). Commerce as represented by retail stores plays an important role as a **meeting point** between men and products, and men and men. The shop whether it is a grocery shop or a hypermarket offers the opportunity of a **face- to-face encounter** between our mass production society and the individual (Gruen, 1973).

People must have some interaction with each other while shopping, therefore, the act of consuming is a more complex one than that of simply buying and selling (Aksel, 2000). From the point of view of the shopper, shopping may be a **chore**, a **social pleasure**, a **relaxation**, or an **impulse** (Beddington, 1990).

In time, shopping has become more of **a profession**. It involves the comparing of prices, style, and quality, but it also is influenced by the desire of spending time to socialize and a wish for exposure to human experiences and entertainment. “Shopping is an affluent society and a life pattern in which people have leisure time on their hands” (Gruen, 1973, 69). Falk and Campbell (1997) accept shopping as a more significant phenomenon. They define it as an **experience** in the lives of the people who undertake it, and more central, as a phenomenon for an understanding of modern and postmodern society.

First, “shopping” denote a **network of activity** of the actual point of purchase of a commodity; “shopping for goods remains a social activity built around social exchange as well as simple commodity exchange” (Shields, 1992, 102). After, shopping is accepted as an **everyday activity** and also as utterly unreflective, that, it intersects with all kinds of discourses those are as much passed on by people through conservation. Then, we define shopping with social relations and the goods themselves. Finally, we come to the understanding that “**shopping is about place and identity**” (Miller et al., 1998).

Shopping is a social activity that links the world of production and the world of ownership and control (Lunt and Livingstone, 1992). That is why consumption, as Bourdieu (1984, cited in Miles, 1998) points out, actively involves signs, symbols, ideas and values which are used as means of **marking off one social group from another**. Yet it is simultaneously integrative in providing an arena within which consumers can feel that they **belong to something**, whether that can be a particular fashion code or a shopping center (Miles and Paddison, 1981).

The history of consumption as a field has focused primarily on the **image**-making of advertising on one hand, and the consumers' **social identity and desires**, as individuals or as part of communities usually defined by gender, class, or race, on the other. (Cohen, 2003)

Change in shopping patterns / consumer behavior

The change in the location of the population, particularly with the shift out of big cities (Davies, 1995) is one of the variables affecting consumer behavior**.** A further change in consumer patterns is the emergence of **new consumer lifestyles** based on the broadening horizons of consumers. These may be associated with higher levels of personal mobility- higher rates of car ownership etc. (Davies, 1995). As the **mobility** of people increase, so does the opportunity for going anywhere on earth for shopping.

The increase in **credit card ownership** is another important factor influencing the consumer behavior. The invention of the credit card has made it difficult to distinguish people having a lot of money from those with little. Credit card owners tend to use their credit cards to their limits.

The transition to **hypermarkets** has affected shopping behaviour. Hypermarkets and supermarkets offer the consumer, under the same roof, a large selection of goods that she/ he may look for ranging from grocery to cleaning products and even a possibility to have a quick meal. This leads to the assumption the consumers with limited time prefer to shop at one stop (Aksel, 2000).

Changes in the shopping and consumer behaviour, the increase in credit card ownership, car ownership, **shortening life- span of products**, **refrigerators** with deep freezers and the increase in the number of **working women** favour modern retailing. Today people prefer to obtain all their needs from one store instead of each item from different stores. The **least cost in less time** has become the most important factor that seems to affect consumer preferences.

Within the overall trend of growth in consumption, there is a shift in consumption towards **specialized products** and services, and in addition, behavioral patterns are becoming more fragmented (Groeppel and Bloch, 1990, cited in Davies, 1995).

In many cities **window-shopping** would appear to be a vanishing activity. Where there are display windows, people window-shop, and the stores that have them enjoy a competitive edge greater than before. With an attractive window, even a small, five meters wide store can draw up to three hundred shoppers an hour. How many become buyers is harder to tell, but the number of lookers and buyers correlate with the number of pedestrians. Window-shopping is highly selective. Pedestrians slow down or stop sometimes and even exchange comments with the people they are with.

Virtual shopping is shopping through computers in virtual space. One minute from the United States, and the other from Paris. The number of internet users in the world was 213 in 1981, whereas in 1994 it reached 25 million (Cumhuriyet: 22 July 1999). Shopping on the internet accustoms people not to go shopping, whether it is the city center or shopping centers. Above and beyond, virtual shopping destructs relationships established through consumption.

2.2.2.2. Consumption Places

Consumption spaces have continued to develop in response to the ever-**increasing power of consumerism**. New types of consumption spaces have been developed, usually in **decentralized locations**, while the largest town and city centers have retained their commercial dominance. (Thomas et.al., 2003)

The **traditional structure** of urban retailing is subject to a change in favor of **organized / modern / large-scale retail** organizations; the geography of large businesses might be quite different from that of small and independent retailers. The difference lies in the fact that for large domestic and international businesses, economies of scale do not necessarily come from agglomeration economies realized through the growth of business clusters. Rather, thanks to their own sizes and organizations, they benefit from some of the economies of scale typically associated with manufacturing. They operate with production functions and sensitivities to scale economies and distribution costs which are different from those of small retailers. (Boyacı and Tokatlı, 1998)

Modern-organized retail is the large retailer. It is less constrained with already existing business clusters or hierarchies. The organized retail might choose non-integrated locations. They, after all, possess adequate potential for internal linkages, which enables them to survive without others nearby. They also possess potential to influence customer attitudes through advertising campaigns, pricing policies, and variations in store image which would make the customer's perceptual image of the retailer more important than its actual physical location. Migros, Gima, Carrefour, Makromarket, Çağdaş are examples of organized retail.

Traditional Retail is the small-scale retailer. They are still located primarily in the residential areas and are heavily oriented towards demand in the immediate neighborhood. For traditional retail, one way to achieve some of the economies of scale is to come into closer association with a wholesaler. Among such forms of organization is the voluntary group whereby traditional retail undertakes to buy from a wholesaler in return for a discount and supporting services. Groceries, greengroceries, butchers are the examples of traditional retail.

Shopping Units

According to the research about the definitions, names, types and classifications of the shopping units a typology is formed below.

Shop: varies to a large extent in terms of their size. Although there are shops with a lot of rooms, and many floors selling different products like clothes, shoes, cosmetics and even food; shops, where the owners work and also accommodate in, still exist

Anchor store: is usually a large department store that serves as one of the main draws to the mall. Many malls will have two to five anchor stores strategically placed around the cluster of smaller stores that are found at the core of the layout of the mall.

Department Store: is a collection of various brands under one roof and one management. Department stores are mostly located in the city center or a large shopping center. Since it does not have any other activity than retailing, it should be supported with heavily pedestrian routes.

Supermarket: is the first self-service retailing unit trading with a limited range of non-food items which occupies not more than fifteen percentage of the sales area for storage and service facilities. The average sales area varies between $1000m^2$- $2500m^2$ with at least 10- $12m^2$ parking space for each customer car,. The interior spaces of the supermarkets have many features competing for attention, special promotions or displays, an avenue of specialist stores, a service counter, an access of information, shopping carts, kiosks and so on.

Discount Store: provides the customers cheap products and are generally located in cheap and easily accessible peripheral areas.

Hypermarket: is another self-service store, operated by a single retailer with a wide variety of food and non-food items with minimum capital, running costs and consequent competitive pricing. Besides a wide range of consumer and durable merchandise available in hypermarkets, small shopping units within the shopping frontage and also restaurants are situated within the main building or in other buildings adjacent to the car park (Corporation of Glasgow, 1971).

The word, hypermarket, coming from the French language *hypermarche* implies the developed idea of the supermarket and extends the techniques of self-service as direct as from the merchandiser to the customer. Hypermarkets are mostly located outside the city on green fields (Corporation of Glasgow, 1971) where land is cheap and available. The definition of hypermarket is given in the book of Corporation of Glasgow (1971) as a single-level, simple structure with windows along the frontage only having 5,000 m^2 gross sales areas on the ground floor, where storage and sales areas are both arranged in the same place, and seventy percent of the products are food whereas the remainig is non- food products, and has a minimum of 1,000 cars parking.

Product Specialized Mass Merchandiser: have a sharply defined role, but instead of size of coverage they have a depth of stock, covering an almost encyclopedic variety in their chosen slot.

Big box: is a term that refers to a style of a physically large chain store. The floor space is several times greater than traditional retailers; in North America, it is generally more than 5,000 m^2, sometimes approaching 20,000 m^2, though varying by sector and market.

In countries where space is at a premium, such as the UK, the relevant numbers are a fraction of that. They are located in suburban or rural areas, often in proximity to freeway cloverleaf interchanges, as opposed to downtown shopping districts.

Shopping Centers

There are currently **no standard definitions of the shopping centers**. But within this study the **shopping center** is regarded as a retail property that is **planned**, **built and managed as a single property**, comprising units and public areas, with a minimum gross leasable area (GLA) of **5,000 m²**. GLA is defined as the total floorspace excluding hallways, public areas, parking lots and servicing areas.

Kelly (1956) points out that the land of the shopping center and the buildings should be **owned by a single agency** whereas facilities can be **leased to different retailers**. And the types of retail outlets in the shopping center should offer a **balanced representation of goods and services**.

The concept of "shopping centers" is by no means new in the sense that wherever communities have grown, "shops" or markets have developed and over a period of time have become " unplanned shopping centers". This was true up until the 1939- 45 war, when a new building type emerged: "the planned shopping center" (Beddington, 1991). Actuallty before then, the very first shopping centers; *bedesten*s and *çarşı*s were existing in Anatolia (Aksel, 2000).

Shopping centers have incorporated **other services besides retailing** like movie theatres, skating rinks, even miniature golf courses within the site (Cadwallader, 1967). Besides, it is surrounded by **huge parking facilities** (Dunne et al., 1966). The "shopping center" is not a static structure, it continues to develop within itself.

According to sociologist Akçaoğlu (2008) from the Middle East Technical University's Sociology Department, shopping centers serve as "**touristic sites**" for people from the lower economic scale; as "**a part of social life**" for middle-class people; and as "**a station between work and home**" for the wealthy. Although the consumer profile could vary according to the center's location, shopping centers **generally serve middle-class people**.

Rising motorization rates have also facilitated more **car-dependent locations**. Shopping centers expected most people to drive there, requiring patrons to have a car. There was some **bus service**, but routes were carefully planned to bring nondrivingwomen from suburban towns, not urban dwellers. (Cohen, 2003)

The shopping centers **limit democratic rights of customers**. They are **depoliticized spaces** (Judd 1995, Hayward 2001, Salcedo, 2003). The shopping mall has long served as a symbol of stupid consumer culture – a **privatized, sanitized public space** where the only form of human interaction is shopping. (www.deadmalls.com)

Shopping centers consider themselves as **privately owned public spaces** over which property owners assume they have **fully controlled access**. In shopping centers the **tendencies of homogenization** and **segregation of consumption** and consumer are expressed (Davis, 1992, Judd, 1995, Connell, 1999; Oncu and Weyland, 1997, Salcedo, 2003).

The dreamlike quality of the mall helps to obscure the fact that everything is carefully orchestrated to **maximize shopping** (Judd, 1995, Yırtıcı, 2005), which is achieved through a **standardized, homogeneous mix of stores and store formats and products** (Judd, 1995). Shopping centers provide a place for communities where the only real purpose is nothing but an ideological cover: **to turn a profit**.

Shopping centers are geographically bound expressions of a negotiation between mall developers as representatives of a **global logic of capitalist accumulation**, on one hand, and **local characteristics**, on the other. (Salcedo, 2003) Malls might be characterized as **globalized spaces** with an internal logic based on **a free market ideology** and **partnerships with local firm**s to promote consumption and profits. (Salcedo, 2003)

Nowadays, malls do not even pretend to sell necessities. No dry cleaner's, no hardware store, no vegetable market, no laundry, no place to pick up eggs or milk or a bottle of sherry or a newspaper. Mall developers and their vendors prefer **theme and specialty stores** and **repetitious chain stores** like Adidas, Nike, Lacoste…. Etc.

Types of Shopping Centers

Shopping Centers are categorized according to the International Council of Shopping Center (ICSC) definitions for Europe.

A **traditional shopping center** is an all-purpose scheme that could be either enclosed or open-air and classified by size. **Specialized shopping centers** include specific purpose-built retail schemes.

Very large shopping center: has an extensive variety of general merchandise, apparel, furniture, home furnishing and a variety of services and recreational facilities. These shopping centers have a GLA of 80,000 m^2 or more (Aksel, 2000).

Large shopping center: has one or two department stores, thirty to fifty shops, recreational activities, a community meeting place, cinemas and parking facilities. It serves a population between 100,000 to one million or more residing within 30 minutes driving time of the site (Kelly, 1956) and has a GLA between 40,000m^2 and 80,000 m^2 and has open and landscaped malls within the site.

Medium shopping center: provides a wide range of facilities for the sale of soft good lines like clothing and hard good lines like furniture; has professional offices and usually a bank or bank branches. Parking facilities are also provided in these shopping centers. The typical size of a medium shopping center is between 20,000m^2 and 40,000 m^2 of GLA and it serves a 15,000 to 30,000 population.

Small shopping center: serves the needs of localized areas within the city and satisfies day-to-day living needs of the immediate neighborhood. It serves a minimum of 750 families and consists of a supermarket, a drugstore and a few service stores with a food court. Small shopping center is the smallest type of shopping center with a GLA between 5,000m^2 and 20,000 m^2.

Retail Park: comprises mainly medium- and large-scale specialist retailers.

Factory Outlet Center: provides discounted prices that may be surplus stock, prior-season or slow selling for the consumer with separate store units, where manufacturers and retailers sell merchandise.

Theme-Oriented Center: includes some retail units and typically concentrates on a narrow but deep selection of merchandise within a specific retail category.

Shopping Center Location Priorities / Standards / Criteria

In retailing, the decision-making unit is the firm, however many of its decisions may be conditioned by market demand, government intervention and technical considerations (Scott, 1970). These are:

- **Accesibility**: modes of transportation, highways, road intersections
- **Urban morphology:** choosing new locations in growth areas
- **Population**: at walking distance
  - density
  - purchasing power
- **Market Opportunities**: other shopping centers nearby
- **Availability and Cost of Land:** geryfields, brownfields

2.2.3. The Impact of Shopping Centers on the City Centers

By the 1990s, it became evident that **large and very large shopping centers** were having significant **negative impacts** on surrounding town and district centers (Crosby et.al, 1990).The larger the retail decentralisation, the greater the impact. Recently, there have been a number of attempts to represent Britain's large shopping centers and very large shopping centers as effectively being the **cores of suburban areas** (Lowe, 2000).

Throughout the period of change, central and local government planners have been mindful that the decline of the city centers is resulting in the **loss of the commercial and social foci** for the life of many communities. (Thomas and Bromley, 2002)

All these scattered shopping centers are signs of a major transformation. With the aim to accelerate the circulation of urban capital and to ensure the continuity and increase of consumption, shopping centers are reestablishing themselves by becoming a consumption tool (Yırtıcı, 2005). Allocating urban investment, with priority to transportation related projects instead of tackling urban matters holistically,in other words- socially and physically,could lead to the abandonment of the city to traffic issues. Shopping centers just "happen to be" where traffic congestions are frequently prevalent.

As the out-of-town shopping centers are **not organic growth**, they often **distort local infrastructure provisions** and **distort urban growth patterns**. (Ruane, 2004). The location of the new facilities is of great significance and have the greatest effect in their immediate proximity (Thomas and Bromley, 2002).

Out-of-town shopping centers **damage the sense of community**. They are managed by national firms and chain shops, whereas the city center normally has a larger proportion of locally owned shops. Not only does this encourage **a net outflow of money from the local community**, but it also **reduces local involvement in the city center**. (Ruane, 2004)

The private character of shopping malls stands in opposition to the public street as it leads to the **exclusion of some groups**. Out-of-town shopping centers **marginalise parts of society**. For example, people without access to cars like the poor and the elderly are effectively excluded from actively using them.

Moreover, in many cities, access roads were reconfigured to deliver shoppers directly into downtown parking garages, from where they entered privately policed, commercial centers without stepping onto city streets. Urban downtowns have also mimicked the **increasing privatization of public spaces** in the suburbs, blurring the lines between what is public and private, and civic and commercial, and threatening individuals' civil rights. (Cohen, 2003)

As residential sprawl begins to develop around the cities, trips to an out-of-town shopping center replace a trip into the urban area as the environmentally-preferable mode of shopping for suburban residents. For them, a trip to city center involves a longer travel distance on more **congested urban roads**.

In considering the cumulative effects of shopping centers, some important differences between the experiences in different countries must be acknowledged. In countries like Turkey; against a background of a relatively free market economy and the absence of a strong body of state and local government planning regulations; a large number of new suburban shopping developments have emerged.

2.2.3.1. Dead Mall[3]

A **dead mall** is a shopping center with a **high vacancy rate** or a **low number of consumers**. One of the first signs that a shopping mall is beginning to transform into a dead mall is the **loss of one or more anchor stores**. When the anchor stores choose to relocate, consumers have less incentive to shop at the mall. As **sales fall**, the **smaller stores** begin to **relocate** or go out of business. The end result is the mall falls out of favor and begins to die (http://www.wisegeek.com/what-is-a-dead-mall.htm).

Several elements may be the source of contribution to the gradual deterioration of a once thriving mall, including **changes in the economy** or the **surrounding neighborhood undergoing a socio-economic decline** (http://www.wisegeek.com/what-is-a-dead-mall.htm). Besides, shopping centers are becoming increasingly homogenous, with **too many stores offering too much of the same merchandise**. And also busy consumers are making **fewer trips to shopping centers** since they are **time-pressed**, consumers seek to **maximize their shopping time**; **fewer consumers** are saying they go to the mall because they **enjoy the experience** (Berry, 1996; Chandler, 1995).

Figure 2.3. Door Announcement of a Dead Mall in U.S.
(Source: www.deadmalls.com)

[3] Commonly used to refer to the entire shopping center

Dead malls are occasionally **redeveloped**. Leasing companies or management companies may change the architecture, layout, decor, or other components of a shopping center to attract more renters and draw more profits. Sometimes redevelopment can involve a **switch from retail usage** to office or educational usage of a building. Sometimes 40 hectares of prime shopping center space is developed **for mixed community use** like schools, libraries and new housing and the rest stays as a shopping center. As a last resort the structure is **demolished** and the property is redeveloped for other uses.

In considering the reasons of a thriving dead mall some important differences between the experiences in Turkey must be acknowledged:

- **Clumsy management** with unsuccessful marketing (*Atakule*, *Millenium, Planet*)
- **Inefficient design of** (*Millenium*)
- Too many branches and ill-balanced endorsement / rent ratio because of high rate in shopping center development (*Millenium*)
- **Unbounded mixuse profile because of privately owned shops** (*Ankuva, Planet*)
- Decrease in the purchasing power with the global economic crisis in 2008

2.3. Evaluation

Cities reflect the character of the society that both creates and sustains them. The urban form, similarly, reflects specialized forms of economic activities, social interactions the legal and administrative structures. Urban space hosts productive, distributive and reproductive activities, and exchanges with each having different requirements and preferences with regard to their location. Locational competition between functions with different economic powers, within the legal framework of planning systems, creates an urban structure in which different functions become inscribed (MacLaran, 2003).

To identify the fragmentation process of the city center and to analyze the nature and characteristics of this process, it was essential to overview the way that the city center was defined and considered by urban development theories. This overview was notably fundamental for the definition of the scope of our study. In this context, the urban development theories are studied in five groups. First, we overviewed the classical theorems, which define the land uses in urban space through the notion of "accessibility" and through their competitive superiorities. These theorems underline the existence of a unique and geometrically central city center. Secondly, the urban ecology theory considers the development of urban space as a spontaneous process and concentrates on the changing nature of the urban layout from center to the periphery. Marxist discourse, thirdly, as opposed to previous theorems underlining the self-regulated processes for the determination of the urban land uses within the competitive milieu, suggest that it is the capital accumulation process which results in distinctive area utilizations. According to this approach, the capital circulates so as to find the best and most profitable location. Fourthly, the post-structuralist approach, which considers the urban area as a part of the whole and as a reflection of the capital's mobility on the global level, underline the significance of locality, public investments and the physical components of the city. The theories were modified to reflect the changing urban structure with the cities' **spreading** further from the core. The extreme simplification of the mono-centric model was either modified by specifying more than on center or it was re-conceptualized by developing the conditions under which the **polycentric** structures would emerge.

Although these theorems are all consistent and correct in terms of their ontological positions, new ways of thinking about the city should be recaptured. In this context, the technological modifications, human behaviors and market outcomes should be considered with respect to the interplay between the profit-based **capitalist decisions** and **individual location choices**.

The increasing spread of the large metropolitan areas resulted in the destruction of urban theories based on the single-centered model and gave way to the rise of multiple-centered urban areas. The city center, consequently, lost its traditional significance and uniqueness, and it became bound to compete with the new rising centers. In this framework, there are three basic reasons behind the fragmentation of the city centers: suburbanization, employment sub-centers and retail decentralization.

The greatest impact was resulted by the shopping center which reflects the physical configuration of the changing consumption patterns. Today, people work harder and they have less time to meet their demand and needs. Consequently, their expectations from the shopping hours increased in such a way that they might expect to entertain or to relax in the time they devoted to shopping. They want to meet various needs at the same time. On the other hand, the developing technologies increased people's speed of circulation among different spaces. It is both the transport facilities and communication means which led to an increase in the speed of circulation. Today, shopping possibilities through the communication means is not advanced enough so as to be an alternative to the visit of the shopping spaces. The investments on the rapid rail transport systems and the increase in the number of private car ownership clearly reveal that the notion of accessibility among different spaces is now required on a different level. The increase in the capacity of fast and comfortable circulation among spaces first quested for alternative locations to the city center where the land prices, rents, and the level of competition, agglomeration and capital accumulation is high. The investments, by certifying the tenets of the urban theories', tended to leave the city center, and the best example for this sort of development is the shopping center.

The shopping centers do not offer an environment for the shopping activities only. They provide a hygienic, safe and air-conditioned milieu, and offer a comfortable background for the visitors' to meet their various needs and desires. As opposed to the spreading and widening structure of the city centers, the shopping centers have a compact structure. In addition, unlike the fragmented and congested structure of the city center, the shopping centers, which are all equipped with special parking areas, provide comfortable circulation areas for the visitors. Las but not the least, the shopping centers do not provide a uniform service for every social group, but they rather gather the uses addressing to the tastes of similar groups.

The impact of the shopping center on the city center is not necessarily negative. Through partially taking the load off from the center, the shopping centers could help to decrease the pressure on the center and they could consequently contribute to the projects of the preservation of the city center by emphasizing the public identity of the core of the city. However, the positive aspects generated by the shopping centers are valid only when the citizens and the capital do not abandon the center completely. They have to attach and stay loyal to the city center to ensure the sustainability of its public role. However, the abandonment of the stores, notably by those addressing to high income groups, for settling in the shopping centers reveals the tendency of capital to leave the city center. The capital's abandonment of the city center would give way for a fast process of growing obsolete and outwearing of the city center. Besides, the alienation of the citizens from the city center and supplying their needs only from the shopping centers disturb the social integrity of the city center and thus contribute to the fragmentation process.

CHAPTER 3

THE DEVELOPMENT OF ANKARA CITY CENTER

Many of the studies on Ankara review the city according to the planning periods while the economic, legal and administrative aspects of these periods remain neglected. Each city is shaped with the interaction of local and global processes within the planning framework. This chapter, in this respect, focuses on the spatial development of Ankara city center with respect to the national and international economic transformations and the changes in the legal and administrative structure within the planning process. Ankara, with respect to the structure of the city center, is viewed in three stages:

- Mono-centered city
- Dual-centered city
- Fragmented city center

Within these stages, the structure of the city and the city center is taken into account with respect to their condition during the planning process, the impact of the planning decisions on the city and the center, and the changes in the economic, legal and legislative structures.

3.1. Mono-centered City (1923- 1957)

Ankara, before its declaration as the capital, was a settlement with a population of 20.000 (Altaban, 1998). After the affirmation as the capital, the functions of a capital settled in the city and the population reached 25.000 within a short period of time. Although the residential areas mainly concentrated around the Citadel in the 1920s, there were some settlements in Cebeci and Yenişehir and some summer houses and vineyards in Çankaya, Kavaklıdere and Dikmen. The chaotic development in these years, the housing shortage and the useless housing stock caused a rapid spread with the development of poor quality and random structuring. That resulted in a pseudo macroform. With the sudden increase in the land values, the development tendency shifted to the northern part of the city and Ulus became the focus of these new developments.

The new functions of the new capital and the old functions of the traditional city came together at the two sides of the center. The center was linear with two parts having different qualities (Bademli 1986). The *bedesten*s (market) in front of the Ankara Kalesi, the roads surrounding them and the open market areas like Atpazarı, Koyunpazarı and Samanpazarı determined the limits of the traditional center serving the hinterland of the city (Bademli, 1986b). Also in Ulus, around Karaoğlan Market and Taşhan there was a new city center on the road to Istanbul and the west. The city center was equipped with administrative functions which served the merchant bourgeoisie and administrative bureaucrats (Bademli, 1986b).

Figure 3.1. Lörcher Plan (Source: Cengizkan, 1998)

In 1924, Ankara *Şehremaneti* was launched with the Act number 417 by the Ministry of Interior Affairs (Altaban 1998, Bademli 1986). *Şehremaneti* established and operated new flour and bread factories, constructed worker houses and established the first telephone communications (Altaban 1998).

In 1925, 400 hectares of marshland in Sıhhiye was expropriated by the “tax value” with the Expropriation Law number 583 and the Heussler firm prepared development plans for the Sıhhiye district. Lörcher’s Plan directed the developments and implementations and formalized the dichotomy between the old and the new Ankara. The plan determined the roads and the housing blocks between the station and the Cumhuriyet Boulevard. Although the plan was insufficient for the Castle district, it produced a local development plan for Yenişehir. This compulsory purchase paved the way for the southern development of the city and determined the direction of the Atatürk Boulevard connecting the old and new centers (Kızılay Kent Merkezi Çalışma Grubu, 2004). After the determination of the direction of Atatürk Boulevard, The Ethnography Museum, Turkish Society and The Ministry of Foreign Affairs were constructed. In 1926, Emlak Bank was founded as the central institution for the financing of the construction works of Ankara (Altaban 1998).

Only four years after the declaration as the capital, the population of Ankara reached 75.000 (Altaban 1998). Since the housing stock could not meet the demand, Atıfbey District came out as the first squatter area. At this period, the CHP Headquarters were launched in line with the 1st Parliament. The Court of Accounts, Main Post Office, Turkish Aeronautical Association, and the Headquarters of the Ottoman and Ziraat Banks were located in Ulus.

In the 1930s, public investments in Ankara extended to the Istasyon Boulevard on the west, Anafartalar and Kızılbey Streets on the east, and Mustafa Necati and Cumhuriyet Avenues on the south. Ulus, in the early years of the republic bare witness to the construction of various administrative structures such as the first parliament, the Parliament Building and the CHP Headquarter which were built in 1923; Ministry of Finance, Main Post Office and Turkish Aeronautical Association which were built in 1925; Etnography Museum, Turkish Stove and Ministry of Foreign Affaires which were built in 1926; Ministry of Customs and Excise constructed in 1927, state conservatory, and Ankara Palace which were built in 1928; Court of Accounts, the Agricultural Bank, Ottoman Bank, İsbank, Bank of Industry and Mining, Community Center (*Halkevi*) which were built in 1930.

In 1928, the "Directorate of Development of the City of Ankara" which was founded with the act number 1351 determined the planning of Ankara as the task of the central government (Altaban 1998, Bademli 1986). The aim of this institution was to prepare up-to-date maps and to make and apply the development plans and to take over all the public land when necessary (Bademli 1986).

In the same year, an international competition was held with the participation of three foreign planners among whom the German planner Jansen was the winner. Until the Jansen Plan, the administration of the republican era had constructed the government buildings in Ulus Square, Çankaya Hill, the Station and Atatürk Boulevard in monumental scales (Altaban, 1998, Kızılay Kent Merkezi Çalışma Grubu, 2004). At this period, Ankara Palace, CHP Headquarters, Tekel Headquarters, İş Bank Headquarters, İsmetpaşa Dame Institute and the Municipality Bus Station was constructed in Ulus. Besides, *Orduevi* was constructed between on the Atatürk Boulevard (between Kızılay and Sıhhiye); Ministry of Forestry on the Akay Hill in Kızılay, and the Presidential Palace in Çankaya. With the Act number 1351 (inaugurated in 1929), 20 hectares of land were compulsorily purchased for the Vekaletler District, but no land was kept for the Parliament. These developments were all significant inputs for the Jansen Plan (Altaban, 1998).

In 1931, Ulus was serving for various administrative and financial public investments with the location of notable structures such as the office of Prime Minister, (eight) government departments,Turkey Grand National Assembly, Presidency of Republic, Court of Accounts, State Council and the Statistic Agency, Police Headquarter, Land Resgistry Office and the relative offices.

The republican administration changed the legislation with five acts that they established between 1930 and 1935. Besides, they determined the principles on urban administration and planning and burdened cities over a certain size with plan preparation duties (Tekeli,1998). The five acts were, the Municipality Act number 1580 and General Sanitary Act number 1593 which were inaugurated in 1930; Construction and Road Act number 2290 and Municipality Bank Foundation Act number 2033 inaugurated in 1933;

Municipality Expropriation Act number 2722 inaugurated in 1934 and the act number 2763 on the foundation of Municipality Development Council inaugurated in 1935 (Tekeli, 1998).

The **Jansen Plan** acknowledged in 1932, projected the population of Ankara as 300.000 for the 50 years time period (Altaban, 1998). The urban macroform was designed along the north-south axis. The Atatürk Boulevard, in this sense, connected Ulus, Yenişehir and Çankaya (in a compact structure) and integrated the old and the new city (Günay 1988, Altaban 1998). The Vekaletler District, which would be constructed in Yenişehir, was designed as the administrative center while the southern part of the district was allocated for the Parliament. Yenişehir was designed as a middle density residential area (Altaban, 1998). In addition, new residential areas were proposed in Cebeci (in the east) and in the area between Vekaletler and Tandoğan districts (in the west) (Altaban, 1998). The area surrounded by Etlik Road, Bentderesi, İstanbul Highway, hippodrome and Çubuk Stream was planned as worker districts. In the plan, the commercial center was not considered distinctly; the development decisions, functional proposals and transportation network pointed Ulus as the city center (Tankut, 1993). The plan did not propose a new center and Ulus was decided to keep its inital functions before the declaration of capital. This plan considers Kızılay as a local center.

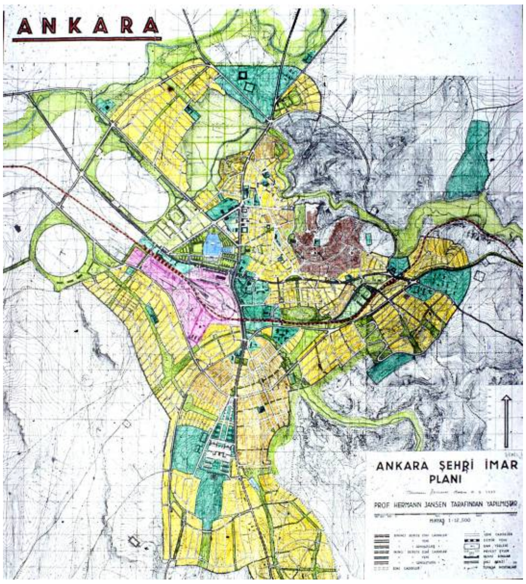


Figure 3.2. Jansen Plan (Source: Tankut, 1993)

The Jansen Plan was implemented in various parts of the city. Following the approval of the Jansen Plan in 1932, the locations of public institutions were decided. The Ministry Complex, the residential areas in Yenişehir and Cebeci, the academies and hospitals in Ulus, Gençlik Park, Hacettepe Park, hippodrome and stadium were all constructed in accordance with the plan (Altaban, 1998, Bademli, 1986). The plan allowed Bahçelievler Cooperative to build outside the development limits. Hence, the construction of the public institutions started between Bahçelievler and Emek (Bademli, 1986). Determination of the Yenişehir district as the administrative center and the residential area demonstrated that the development of the city shifted to the south (AMANPB, 1970). Between 1930 and 1935, Ministry of Internal Affairs, Ministry of Public Works, Ministry of Commerce, Ministry of National Defence, Ministry of Forestry, School of Land Registry, Court of Appeal and General Staff Courtwere construted in Yenişehir while the Ministry of Health located in Sıhhiye.

At this period, the Atatürk Boulevard connecting Ulus to Yenişehir became very significant. Shopping areas, parallel to the development of residential areas, developed around Yenişehir where the government officers resided (AMANPB, 1970). In Kızılay, this development initiated with the housing units leaving their place to the utilities in the city center and with increasing land values prestigious office blocks started to form (AMANPB, 1970).

Presidential Palace and the Palaces of Ministry and Foreign guests were constructed in Çankaya successively in 1932, 1935 and 1937. With this process, the pressures for making subdivisions outside the development limits increased and unplanned developments took place in Bahçelievler, Beşevler and Çankaya. Due to these developments, the Directorate of Development, with the sentence number 103 in 1935, allowed the construction in areas where there were not subdivision plans yet. In 1935, law number 3611 assigned the construction of public buildings to the responsibility of the Ministry of Public Works to achieve a central control. Only the state economic enterprises annexed budget administrations and the Ministry of National Defence had the right to build their own buildings.

Between 1930 and 1940, the expropriations were made for the construction of public buildings and military plants. In this respect, an area of 440 hectares was expropriated to prevent the housing development in the south of the Inönü Boulevard and the west of the TBMM. The administrative center forwards the central development.

In 1936, we see that Emlak Eytam Bank, 19 Mayıs Stadium, the shooting range, bookstore of the Ministry of Education, the department store of the Kavaklıdere Wine Factory, Wagon-lits sales agency and the first Art School were all situated on the Istasyon caddesi in Ulus. On the left side of the street, there were some hotels and inns addressing to low income groups. State Industry and Investment Bank (*Etibank*) and Faculty of Language, Histrory and Geography (Ankara University) were on the alignment of the Fire Department Organization and the İtfaiye Square. At the same period, Head Office of the Red Crescent, the Ministry of Public Works and Housing, the Court of Appeal, and the Ministries of Economy and Commerce were located in Kızılay.

A year after the separation of the Directorate of Development from the Ministry of Internal Affairs and its integration with the Municipality of Ankara (Altaban, 1998), the institution allowed at least 3,000 m^2 area of provisional allotment. Besides, with the sentence number 302, it allowed the constructions outside the development area and, with the sentence no 106, combined the development limits with the municipality border (Altaban, 1998). Thus, an area that expanded from 1,500 to 16,000 hectares was open to speculation (Altaban, 1998). In the same year, the south part of the Vekaletler District was open to construction. However, the oppositions of land owners and the death of Atatürk stopped the construction works. The parliament's new buildings could not come to service until 1961 due to the prior policies applied after the World War 2 (Altaban, 1998).

Following the Jansen Plan, prime ministry moved from Ulus to the Bakanlıklar Sitesi in the Vekaletler District. The construction of the Ministry of Justice, which was established in 1938, started in the place that was assigned for TBMM. The embassies were constructed on the southern part of the Atatürk Boulevard, expanding from Vekaletler to Çankaya.

Although Turkey was not actively involved in the Second World War, the country was significantly affected by the economic problems resulted by the war (Altaban, 1998). Housing shortage became a severe problem in Ankara in the course of the war (Altaban, 1998). While the land prices increased in the inner city, ¾ of the development parcels were empty (Altaban, 1998). At this period, government officers suffered from the housing shortage. The government charged the Emlak Bank for the construction of the “Memurin Apartments” (Altaban, 1998). In 1945, the first stage of the Saraçoğlu Memurin Apartments was completed (Altaban, 1998).

Between 1945 and 1946, the population of Ankara increased significantly due to the migration from the rural areas. The low income groups started to settle around Ulus. Initially, they settled on the slopes around the Castle, in the plain between Bentderesi and Babür Street and around the *Kazıkiçi Bostanları* which was on the west axis of the plain. In addition, they settled around the Asri Cemetery on the north east of the plain, and at the north, north east and eastern parts of Ulus (Şenyapılı, 1983). The invasion of the historical center by the low income groups averted the development of new and prestigious functions in Ulus. During the poverty period following the Second World War, some merchants who had benefited from the war economy established (new) markets for wealthy citizens (Keyder, 2003). Hence, Kızılay, in addition to the existence of presidency, ministries, university and embassies, was equipped with the commercial functions serving for the upper income groups.

In 1946, the multi-party era started and the opposition won at the elections. This was the introduction of a period of liberal economy, market-based capitalism and populist discourses on religious freedom (Keyder, 2003). These developments lead to the temporary legitimization of the squatters in Ankara in 1948, with the act number 5218 (Altaban,1998). In the same year, Construction Incentive Law number 5228 allowed the transfer of the lands of the national treasury to the municipalities. The Law also legitimized the selling of these lands to the houseless for the construction of houses with the exception of Tender Act (Altaban, 1998). The law numbered 5656 which was inaugurated in 1950, allowed the municipalities to build houses on the acquired lands and gave them the authority to redouble, derogate and transfer. This period also signifies a new political order of multi-party system with a new regard on the public bureaucracy and the establishment of new ministries. The headoffice of the Democratic Party was founded in Yenişehir, on the area between the Akay Hill and the Kavaklidere District. The Yenimahalle Development Project started in 1949, with the acts numbered 5218 and 5288, and the plans were prepared by the Directorate of Development (Altaban, 1998). 106 hectares of land were bought with 45% of the payment coming from the treasury and the rest from the owners (Altaban, 1998). The municipality also prepared the infrastructure plan, the site plans and the building projects of 2900 parcels. These parcels were then sold to the users as construction obligation.The project was completed in 1953 and people started to reside in the settlement (Altaban, 1998).

In these years, the Anafartalar Street in Ulus was the nucleus of the urban center (Bademli, 1986b). Ulus looked like a radial center with few extentions from the core (Bademli, 1986b). Traditional central functions were concentrated in Çıkrıkçılar, Hamamönü, Samanpazarı and Kale. The relatively newer manufacturing and commercial regions were established around Sıhhiye, İskitler, Dışkapı and Hergelen Square (Bademli 1986b). İller Bankası, Sümerbank, Halkbank, Denizcilik Bank, Military Court of Appeals, (Ankara) Faculty of Science, (Ankara) Faculty of Medicine, the Opera House, broadcasting studio, Ankara Community Center were the institutions that were in Ulus at that period. Kızılay, on the other hand, was a sub center for the upper income groups with the influence of the Bakanlık Complex (Bademli, 1986b). In addition to certain functions like patisseries and cinemas transferring from Ulus to Kızılay, the National Library was also located in the sub center. While Ulus and the (sub)centers extending from it included 65% of the commercial and small manufacturing workplaces, only 12% of the commercial facilities were situated in Kızılay, on Atatürk Boulevard, Meşrutiyet, Maltepe, Necatibey and Ziya Gökalp Boulevard (Bademli, 1986b).

In 1950s, the population of Ankara, with 300.000 habitants, had almost reached the figure projected for the year 1980 (Altaban, 1998) and 34% of this population was living in the squatters (Altaban 1998). In order to cope with the housing shortage, there was a significant pressure for increasing the number of floors in the city center. In 1951, with this respect, the Ministers Board gave permission for all of the houses in Ankara for the construction of an extra floor. On certain streets, the adding of an extra floor was also allowed (Altaban, 1998).

With this decision, Yenişehir and Cebeci districts were reconstructed with four-storey houses while the buildings alongside the Atatürk Boulevard reached five-storeys (Altaban, 1998). In 1950s, the campus of the faculty of science and the technical schools were constructed on the Maltepe-Bahçeli direction; the area on the east was expropriated for the construction of Mamak Military Zone and Rasattepe and its environment around Bahçeli was exproptriated for the construction of Anıtkabir.

In addition to the increasing mechanization of agriculture between 1950 and 1960, the employment opportunities in the cities increased rapidly owing to the new economic vitality and the migration from the rural areas. The squatter housing development was the consequent of the rural migration. The traditional city, which was in contact with the European metropolises and which belonged to the ruling class with the economic and cultural hegemony, started to vanish (Keyder, 2003).

In 1955, a new international competition was organized for the planning of Ankara and the **Yücel-Uybadin Plan** was the winning project. The plan was acknowledged in 1957 and became operative in a short period of time (Altaban, 1998, Bademli, 1986). The population projection of the plan was 750.000 for the year 2000 (Altaban 1998). The plan preserved the the existing municipal boundaries (Bademli, 1986) which meant that it was followed by an increasing pressure for the densification within the development boundaries. This triggered free and illegal construction outside the municipality and development plan limits (Bademli, 1986). The municipality did not have any stock of land at hand and the development in the new areas was not possible (Altaban, 1998). In 1957, the decree of Development Directorate (number 650) was inaugurated in order to put in practice the implementation of floor area ratio within the whole city (Altaban, 1998). The Ulucanlar Street was opened for development with the expropriation of a good number of buildings. Only one year after the competition, the Development Act number 6875 was inaugurated, and consequently, the contiguous areas of the municipal boundaries were also taken into consideration. The solutions were sought for the problems of a metropolis (Tekeli, 1998).

The Uybadin-Yücel Plan was a limited plan with some additions and manipulations of the Jansen Plan. It combined the existing settlement and infrastructure decisions. Instead of directing the future implementations, the plan was rather directed by the old developments (Bademli, 1986). The plan, which was based on a development along the north-south axis, did not consider the squatter housing problem. It proposed a dense and homogeneous city (Bademli, 1986). With the plan, Kızılay was projected as a denser center than Ulus but not evaluated in detail (Bademli, 1986)

The explanatory note of Uybadin-Yücel Plan (1957) states that:

> “The commercial center of the city is concentrated in Ulus and Samanpazarı and on the Anafartalar Street connecting these two. A new development started from Ulus to Yıldırım Beyazıd district. Apart from this center, a new

commercial region is developed in Kızılay where the existing housing units are leaving their places to the offices and commercial uses. In time, the functions in Kızılay will diversify with the recreational uses, restaurants, casinos and retail stores. Ulus will not change and will remain as the main center."

Figure 3.3.Uybadin- Yücel Plan

The low-income groups which were mainly concentrated around Ulus prevented the tendency of upper income groups to settle in the northern part of the city, and hence, negatively affected the attraction of new and prestigious uses (Bademli, 1986b). This situation had a counter effect on the development of Ulus center. The future of the center is left to the conditions of the market (Bademli, 1986b). The protocol area was located near Ulus. The plan increased the settlement density in Ulus and the squatter settlements around the center became denser. While the wide public uses on the south and southwest could not develop due to the railway dividing Ulus and Kızılay, Eskişehir Highway and the ring road (Konya-Samsun) increased the accessibility of Kızılay (Bademli, 1986b).

The Development Law inaugurated in 1956 declared the municipalities and the ministrial office as the responsible authorities for planning. Ministry of Developmnet and Housing was established in 1958, and first functioned in a rented hotel on the Necatibey Street. Again in 1958, Investment Institutions of Technical Research Units, which were administrated by ministries and which had their own decision authority and separate budget, were established. General Directorate of Highways, Public Waterworks Administration, State Institute of Statistics, and State Supply Office were established in this respect, on the Eskişehir Road. In the same period, METU was founded on the Eskişehir road with the pressure of USA. The land at the south part of the METU Campus was expropriated for the military plant and communication facilities. In 1958, the Ministry of Development and Housing was established with the law number 7116. The Ministry, which was equipped with an expert team on the planning, housing and building material issues, aimed at producing solutions for the increasing rate of urbanization (Tekeli, 1998).

The military coup in 1960 destabilized the existing order. The establishment of the State Planning Organization, following the coup, aimed at introducing a planned economic development. The State Planning Organization did not assign any source for public administrative structures and proposed the settling of public bodies in rental buildings. In this respect, the ministries of development and housing, tourism, transport, culture, social security, rural affairs, youth and pport and the Constitutional Court and State Council functioned on rental buildings. In addition, from 40% to 70% of the ministries of labour, agriculture, industry and technology and customs and excise were in the rental buildings.

Interim Conclusion

Ankaranın başkent ilan edilmesi ile with the sudden increase in the land values, the development tendency shifted to the northern part of the city and Ulus became the focus of these new developments. The new functions of the new capital and the old functions of the traditional city came together at the two sides of Ulus. Lörcher's Plan directed the developments and implementations and formalized the dichotomy between the old and the new Ankara. Although the plan was insufficient for the Citadel district, it produced a local development plan for Yenişehir. Ulus, in the early years of the Republic bare witness to the construction of various administrative structures.

With the Jansen Plan, the administration of the Republican Era had constructed the government buildings in Ulus but Yenişehir was designed as the administrative center. In the plan, the commercial center was not considered distinctly. It did not propose a new center and decided to keep Ulus with its inital functions before the declaration of capital. This plan considers Kızılay as a local center. With the determination of the Yenişehir district as the administrative center and the residential area demonstrated that the development of the city shifted to the south.

At this period, the Atatürk Boulevard connecting Ulus to Yenişehir became very significant. Shopping areas, parallel to the development of residential areas, developed around Yenişehir where the government officers resided. The administrative center forwards the central development. This development initiated with the housing units leaving their place to the utilities in the city center and with increasing land values prestigious office blocks started to form.

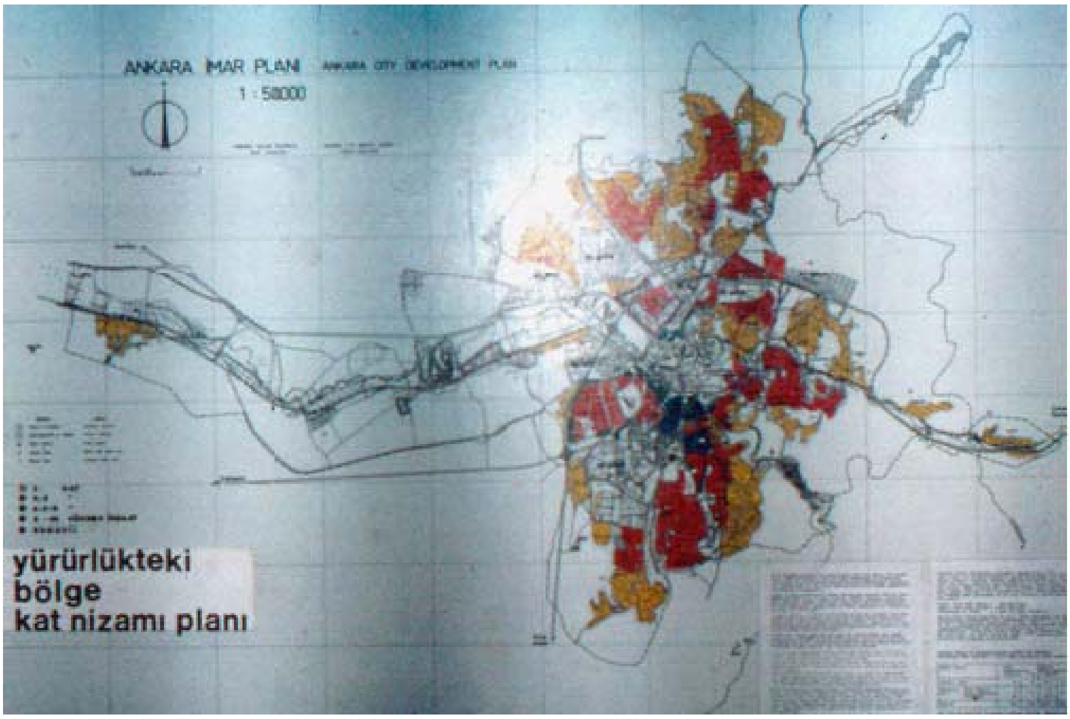
Although Turkey was not actively involved in the Second World War, the country was significantly affected by the economic problems resulted by the war. The population of Ankara increased significantly due to the migration from the rural areas. Housing shortage became a severe problem in Ankara. The low income groups started to settle around Ulus. The invasion of the historical center by the low income groups averted the development of new and prestigious functions in Ulus. Kızılay, in addition to the existence of presidency, ministries, university and embassies, was equipped with the commercial functions serving for the upper income groups.

A period of liberal economy, market-based capitalism and populist discourses on religious freedom developments lead to the temporary legitimization of the squatters. The transformation of the lands of the national treasury to the municipalities and legitimized the selling of these lands to the houseless for the construction of houses.

In this period there was an increasing pressure for the densification within the development boundaries. This triggered free and illegal construction outside the municipality limits and also implementation of floor area ratios within the city and the center. Yücel-Uybadin Plan did not go any further then Jansen Plan.It proposed a dense and homogeneous city like there wer no pressure of polulation and development. With the plan, Kızılay was projected as a denser center than Ulus but not evaluated in detail. So it lead to an unbalanced and uncontrolled central activity allocation.

3.2. Dual Centered Ankara (1959- 1990)

In 1960, following the military coup and the import substitution policies, the concept of planned development was institutionalized and the legal and administrative framework was settled (Işık and Pınarcıoğlu, 2003). The basis of all these policies was to create and protect the national economy gathered around the inner market protecting the local industry of imported commodities (Keyde,r 2003). Thus, the conditions for the creation and preservation of a state-bound national bourgeoisie were maintained. Providing the continuity of economic growth was the basic condition of this process (Işık and Pınarcıoğlu, 2003). Besides, the State Planning Organization which was administratively superior to the ministries on economic level was also founded in this period (Keyder, 2003).



3.4. Regional Floor Regulations

In 1959, **Regional Floor Regulations** that was signed by the mayor and governor was presented to the Ministry of Development (Altaban, 1998). This plan permitted the construction of extra floors within the city (with the exception for 2-3 storey houses in Etlik, Keçiören, Yenimahalle, Dikmen and Çankaya). The plan was approved in 1960 with some modifications (Altaban, 1998). Later in 1968, a plan note of three articles was added to the **Regional Floor Regulations**. According to the note, the attic floors were banned while an extra floor was permitted (Altaban, 1998). This shows that the decisions pertaining to the development of Ankara were no longer taken through the plan but rather defined by the market mechanism (Altaban, 1998). After this period, the construction-demolition stage gained pace.

In 1965, the 6/4970 resolution of the Council of Ministers defined a new duty of planning for the Ministry of Development and Housing. In 1969, the Ankara Master Plan Bureau was founded in connection with the Ministry of Public Works (Altaban, 1998). The Bureau didn't have the authority to approve the plans and they were not directly corresponded with other institutions and municipality (Altaban, 1998). In the same year, the Floor Ownership Law number 634 was inaugurated and opened the way for the construction of housing units with multiple owners on a single parcel. That led to a vertical densification process through the reconstruction of the existing fabric. Local administrations could not resist the demands of capital and started a legal reconstruction process in order to keep capital within the city. The regeneration of the city centers has brought the loss of urban identity and memories along with them.

The Squatter Act number 775 which was inaugurated in 1966 provided a new legitimation framework for the squatter areas which was not in accordance with the development plan. In this sense, the act was more than an Amnesty Law (Tekeli, 1998). The squatter act, defining the areas to be eliminated, rehabilitated and prevented, (Tekeli, 1998) brought about the commercialization of squatter housing production. The meaning of squatter went beyond the simple need of shelter provision; they became the tools to benefit from the urban rents (Tekeli, 1998).

At the same date, Cabinet decision of 6/ 4970 allowed the Ministry of Development and Housing to establish offices in Istanbul, İzmir and Ankara in order to make the master plans. With the 1970 cabinet decision, municipal housing departments gained the right to make the plans independently. The amendment number 1605 which was inaugurated in 1972 left the big cities out-of-service. At this period, the relative departments of the State Planning Organization, municipalities, Ministry of Public Works and Settlement, General Directorate of Highways, General Directorate of Public Waterworks, Ministry of Industry and other relative ministries and institutions were the units that were responsibe with the city planning issues. Metropolitan city could not develop because of the planning and construction processes and the market mechanism has found the opportunity to create its own city.

In the 1970s, we see a dual center composed of Ulus and Kızılay, or two different sections of a center, where the relatively newer capital functions were settled in Kızılay. As an example, the extensive public utilizations divided the south and north of the center. In the east, the hospitals of Hacettepe, Numune, High Specialization and Maternity; Kurtuluş and Hacettepe Parks; and the educational facilities such as Faculties of Language, History and Geography and Social Sciences, Faculty of Science Complex and conservatory were situated. On the west side of the Atatürk Boulevard, there were storage and industrial units ended with the Cebeci Stadium. On the north, Gençlik Parkı and hippodrome and on the west Faculty of Science, Gazi Faculty of Education, and School of Technical High Teacher and Atatürk Forest Farm were situated.

Research Laboratories of the Turkish Petroleum Corporation were established on the Eskişehir Road in 1975 and Turkish Electricty Board in 1980. The National Library was moved from Kumrular Street in Kızılay to Bahçelievler. Between 1975 and 1985, Cement Industry, Testaş, Havelsan, Desiyab, The General Directorate of State Airports Athority, Bank of Tourism, Ministry of Customs and Excise, General Directorate of Mineral Research and Exploration, Halkbank and Police College were all established either on the Eskişehir Road or in Gölbaşı. Palace of Police, General Directorate of Highways and the storage departments of General Directorate of Water Power Road, Faculty of Agriculture, the Institues and the School of War were launched on the Konya-Samsun road at the northern part of the Eskişehir Road.

In the 1970s, financial decision and public administration functions operated in Ulus. While the General Directorates of the Banks, the Ministry of Finance, The Main Post Office and provincial departments were situated around the Ulus square, the government agencies were intensively located in Bakanlılar in Kızılay. Besides, the headquarters of political parties, trade unions, student unions, meslek odaları and the clubs which were in direct contact with the state were also situated in Kızılay (Akçura, 1971). The Chamber of Industry which was established in 1963 in Şehit Teğmen Kalmaz Street also moved to the Atatürk Boulevard in 1977.

The 1970 analysis of Akçura and AMANPB reveal that, besides the physical differentiation, there was a clear differentiation between the professions, income level and life styles of the inhabitants of Kızlay and Ulus. While Ulus was specialized in non-commercial production, Kızılay was specialized in the service sector. In 1970, 32% of the offices of Ankara were situated in Ulus and 14% in Kızılay.

In 1970, Ulus was surrounded from the north by the university that used extensive land, health-service buildings and administrative structures; squatters and the historical housing area from the northeast and southeast; Industry Market of auto repairers, presses and workshops on the west of the Çankaya Street; Gençlik Park on the southwest and Railway storage units, university and hospital on the south. Aside from the Ankara Chamber of Commerce, General Directorates of the Banks and a number of firms in Koç Han and on the Postane street, the decision-making functions of commercial and business areas were not situated around the Ulus Square. Considering the assistant business services, there were the offices of advocacy and law as well as the bureaus of financial experts and other relative services. Besides, personal services like tailoring were also situated in Ulus. On the Anafartalar Street, there were shops and intensif retail services serving for different income groups. On the upper floors where there was no retail trade, there were personal services such as the doctors and advocates and craftsmen. From Samanpazarı towards the castle, the type and the quality of the products changed; the products and the potential clients became rather rural in character. Food storage departments, modest hotels, potteries and the artisants situated on the Ulucanlar Street. Furniture and upholstery stores and warehouses situated on the Konya and Denizciler Street (Akçura, 1971).

In 1970, Kızılay, which hosted many public structures within its limits, differentiated from Ulus with the public institutions situated on large areas. The part of the Atatürk Boulevard that was between Kızılay, Sıhhiye and Lozan Square and the connecting streets were the densest part. The ground floor shops were occupied by a variety of shops selling more qualified and more expensive goods. Bakeries, kiosks, stores selling jazz and classical music discs, bookstores with foreign books and magazines, foreign and domestic travel agents and the Turkish Airlines Terminal were some of the functions settled in this area. Similarly, the representative offices of foreign firms, the agencies of Istanbul newspapers, the architectural offices and other technical bureaus, all of which serving high income groups were located on the boulevard (Akçura, 1971).

On the Sakarya Street, there were delicatessen of foreign products and in the Izmir Street, there were shops selling illegally selling American products. The upper floors were mostly occupied by personal services like male and female barbers/coiffeurs, women tailors, the doctors, advocates and the luxury sevices such as photography workshops, advertisers, insurance companies, housing estates and photocopy centers. (Akçura, 1971)

In 1970, intercity bus terminal, some public buildings and economic state enterprises were situated on the Necatibey and Mithatpaşa Streets. With the move of the Court House to Sıhhiye, the number of the law offices, which are still active today, increased in a significant extent around the Strasbourg Street.

In 1973, the studies of the Ankara Nazım Plan Bürosu assigned the organization of central administration functions in Bakanlıklar and around the parliament building, with the decision that the public land in the south of the Military school was proper for the ministries and relative institutions. In addition to the lands determined for the localization of the public institutions, Bahçelievler junction, the section between the Konya-Samsun junction and the Eskişehir Road were proposed. The public functions requiring large land with relatively weaker public relations, were assigned to the Eskişehir Road, AOÇ and the road between the AOÇ junction and Ümitköy.

The Land Office which was founded with the act number 1164 in 1969 aimed at strengthening the role of the Ministry of Reconstruction and Housing in the provision of urban land for directing urbanization. However, due to the inadequacy of resources, it did not operate effectively (Tekeli 1998).

On the other hand, the act number 1605 founded in 1972, introduced important modifications in the Development Law 6735 (Tekeli, 1998). The Ministry was given the authorization to prepare master plans especially in the metropolitan areas (Tekeli, 1998).

In 1970, the population of Ankara was 1.200.000. Only 49% of this population was settled in legal housing stock (Altaban, 1998) while 44.5% of the urban land was made up of irregular housing areas. In addition, only the 5% of the necessary green areas, 8% of the health facilities, 9% of the cultural and educational facilities, and 14% of recreational centers were available (Altaban 1998). Apart from these, air pollution severely affected the city (Altaban, 1998).

According to the studies of Akçura, the central functions of Ankara were collected in two centers apart from each other. The northern and southern parts of the city were differentiated in terms of the occupation, income, education and lifestyle of the inhabitants. Similarly, there were clear physical differences between the two parts. Atatürk Boulevard was the single strong axis connecting Ulus and Kızılay (Akçura, 1971). The research studies of the 1990 Ankara master plan in 1970 revealed this duality between the city centers. 60 % of the retail expenditures of Ankara were made in Ulus and Kızılay (39% in Ulus and 21.9% inYenişehir).However, the central functions were richer in Ulus than Kızılay. The non-residential functions were wider in Ulus than in Kızılay. While 60% of Yenişehir composed of housing area, the non-residential functions constituted the 60% of all usages in Ulus. These ratios reflect the differences between the two centers.

In these years, government agencies such as Public Waterworks Administration, public highways and General Directorate of Mineral Research and Exploration, military barracks, METU, Military Schools and socio-cultural facilities were situated on Eskişehir Road while Konya-Samsun Road hosted the structures like Palace of Police, storage departments and industrial military plants, public highways and the storage units of YSE, specialized industrial units and educational institutions(Akçura, 1971).

The roads reaching Ulus were mainly connected to the squatter areas and sometimes middle class neighborhoods.The main axis coming from the north went from the south of the Kale and reached İstanbul highway and Yenimahalle passing from the two sides of the hippodrome and the southern branch passed from Kızılay and reached Bahçelievler (Akçura, 1971). The east west axis of Dikimevi and Bahçelievler passed from upper and middle class neighborhoods, and the upper class southern neighborhoods crossed in the point where the Atatürk Boulevard and Ministries are in Kızılay and this place formed the center for these groups (Akçura, 1971).

This duality is also reflected in the public transportation system which is served to the city center. The middle and upper social groups had direct accessibility to Kızılay while the poorer groups could access Ulus without direct accessibility to Kızılay. Ulus and Kızılay were tightly connected by the densest public transport services of the city (Akçura, 1971). The squatters were mainly served by the relatively cheaper minibus services, while the *dolmuş,* which were relatively more expensive, was used by the middle classes and mainly in Kızılay. The minibus and *dolmuş* lines tightly connected Ulus and Kızılay and formed a unique system. On the other hand, buses intersected with the traffic of the neighborhoods in their routes from Dışkapı to Bakanlıklar. In Ulus, the buses serving the low income and middle class neighborhoods connected the north south axis (Akçura, 1971).

The public offices were mainly in Bakanlıklar, either in or by Kızılay. Between 1930 and 1970 the buildings in Kızılay were rebuilt at least once, planned roads were constructed and the topography was very proper (Akçura, 1971). The business density of Kızılay was lower than Ulus.

Although the resolutions of the **1990 Ankara Development Plan** were completed in 1973, they were not approved until 1982. The 1990 Ankara Development Plan was not an implementation plan but it was rather a “structural plan” with determined principles. The general target of the plan was:

- to provide service-production balance in the economic structure,
- to solve the dual urban structure,
- to provide equal distribution of the public services within the city,
- to create an urban environment in which one can live decently,
- to efficiently use the existing transportation and technical infrastructure ,
- to emphasize public transport,
- to take into account the tendencies which are applicable and realizable,
- to adopt the development strategies of the authorized- investor public institutions,
- to transfer settlement areas to public use and
- to provide housing for low income groups (AMANPB; 1977).

According to the plan, the urban macroform would shape along the development corridors and decentralize on the west and southwest axes for 20-30 km. Most of the resolutions were shaped by the local development plan and development plan alterations.

1990 Development Plan foresaw that the spread of the central accumulations, especially the workplaces would lead to the spread of the residential areas as well. Similarly, the density of the housing area and the service sector would increase in the new development areas, and the shopping functions would develop in the existing and new sub-regions. The administrative, cultural and specialized commercial functions would persist in the urban center.

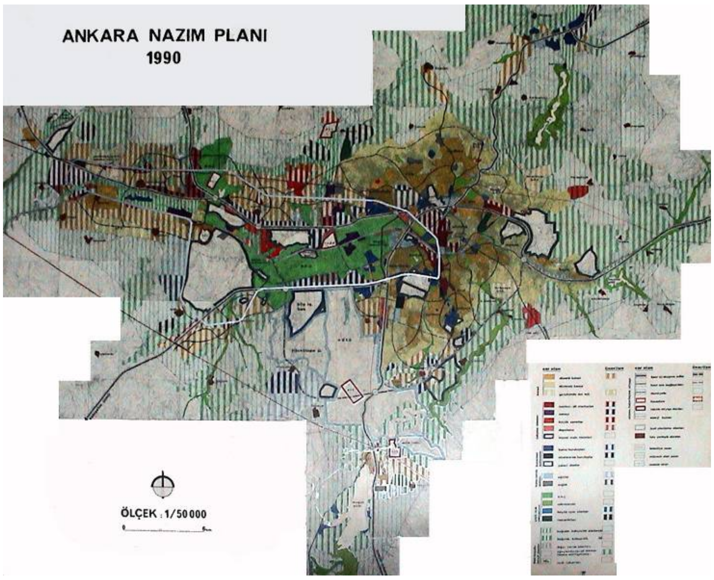


Figure 3.5. AMANPB Plan (Source: AMANPB, 1977)

According to the plan, Ulus was still important in the hierarchy of the centers and it would develop along the İstanbul Road in the Kazıkiçi Bostanları area which reaches the Konya-Samsun ring road. The tendency of spreading to the south was supposed to be prevented by using the vacant areas in the north and by evaluating the potentials for the development.

Contributions of the 1990 Ankara Development Plan:

- Squatter Prevention Zone in Sincan
- Expropriations in Batıkent (started in 1974 and completed in 1978)
- Ankara Organized Industrial Area

- Kızılay Pedestrian Area
- Conservation of the historical center
- Atatürk Cultural Complex
- Altınpark
- Abdi İpekçi Park
- Road project for the exclusive use of (X)
- Expropriation of a large amount of urban lands

In 1978, the Sakarya Street and the connecting streets were closed to the vehicular traffic and assigned for the pedestrian use only. Following the studies of EGO, the circulation in the Izmir and Yüksel Streets, similarly, were limited only for the pedestrians.

The 1990 Master Plan, which takes into account both the existing and proposal housing and industrial areas, did not offer any proposal for the existing squatter zones. At that time, there was not a plan prepared taking into account the sectoral development areas and processes determined by the system. (Akın, 2007)

The resolutions of January 24 in 1980 proposed the abandonment of the import substitution (Işık and Pınacıoğlu, 2003) and the organization of mixed economy model (Kılıçbay, 1984). This provided the integration of Turkey with the global market and required the involvement with the globalization process (Tekeli, 1998). A period of liberalization began with the attraction of liberal enterprises (Kılıçbay, 1984). Following the September 12 coup, the role of the inner market diminished: the resources were gathered for foreign oriented growth, the state took on a passive role in the economy, the services began to be privatized and the mechanism providing the redistribution of social income by the state came to an end (Işık and Pınarcıoğlu, 2003). After these years, the income gap between the poor and the rich grew tremendously. And also the policies giving more opportunities to actors and which change according to the strengths of the actors and the features of the place, were formed (Işık and Pınarcıoğlu, 2003). Post 1980 period signifies a serious transformation process not only for Ankara but for the whole Turkey. The new approaches in the planning discipline, radical changes in the institutional structuring, new legal and legislatives regulations also constituted the base of a new spatial organization.(Akın, 2007).

In 1984, the Ankara Metropoliten Alan Nazım Plan Bürosu was closed with the decree law number 195 and the succesive law number 3030. In 1985, with the law number

3194, the AMANPB was transferred to the Ankara Metropolitan Municipality and was connected to the Directorate of Development (Altaban, 1998, Bademli, 1986). Thus, the Directorate of Development of Ankara which was founded privately turned into a municipal agency. At this period, the municipality had the authority to prepare, approve and apply plans (Altaban, 1998, Bademli, 1986). Between 1985 and 1989, the unit (Metropolitan Planning Office) operating in dependence with the Metropolitan Municipality was shifted to the structure of the Ministry of Housing in 1989 in order to provide the hierarchical integration of the plans. (Akın, 2007)

In the same year, the act number 3030 defined the metropolis related to the municipalities in which there is more than one district were defined as metropolis. In the decree law number 504 concerning the metropolis, the lower level municipalities did not have to be district municipalities, and the municipalities that formed the Metropolis Administration were called "Lower Level Municipalities" (Ünal, 2004). Altındağ, Çankaya, Keçiören, Mamak and Yenimahalle district municipalities were founded under the Ankara Metropolitan Municipality. Following that, the Sincan, Etimesgut and Gölbaşı districts were founded. (Akın, 2007)

Between 1985 and 1989, the planning activities in Ankara were realized within a triangle: The Municipal Planning Unit within the municipality boundaries, Ankara Directorate of Development and the Master Plan Office. The Master Plan Office, which was under the Directorate of Development were responsible from the peraparation of a master plan on the metropoloitan scale. In the 1/5000 scale, the unit responsible from the coordination of the planning activities in the metropolitan area was the Directorate of Development. Municipality's planning department, which operated on the lower scale, controlled the municipality's projects and the urban design and architectural projects. Within this triangle of planning, the preparation of the plans was rather in a patchwork-like; the hierarchical structure of the plans was neglected. (Akın, 2007)

In 1985, the act number 3194 shifted the authority of plan making from central government to the local administrations and municipalities. It was then the municipalities which had the authority to make and approve plans. The second important modification was the establishment of the metropolitan municipalities. Until this period, the Development Plan Bureau, the Directorate of Development of Ankara and the Planning Unit of the Municipality were working side by side (Bademli, 1999).

Thus, three planning authorities were gathered within the Directorate of Development. In the same year with the Amnesty Act number 2981, revision plans, which dismissed all the false constructions, were made. Beginning from 1983, the inauguration of the amnesty laws number 2981, 3290, 366 and 3414 eased the preparation of the revision plans for the squatters and illegal urban development areas (Altaban, 1998). The amnesty acts gave way to the apartment block developments in the squatter areas (Tekeli, 1998). With this amnesty law, the illegal developments in the authorized neighborhoods were also dismissed. While the rehabilitation plans proposed a westward development, the amnesty laws paved the way for eastern expansion.

The Ministry of Reconstruction and Housing did not only give the municipalities the authorization to prepare plans, but also created many planning authorities. In this period the Ministry of Tourism, Ministry of Environment, Ministry of Cultural Works, Environmental Protection Agency for Special Areas and the Military were also the institutions preparing plans. The district municipalities had the same planning authority with the Metropole Municipality (Bademli, 1999). They could prepare development plans independent from the metropolis with the resolutions of the parliament and could establish housing and industrial areas (Altaban, 1998).

In opposition to the 1990 Ankara Development Plan which proposed a western development, the real density was on the east (Bademli, 1999). The damages that this development brought to the infrastructure and the insfrastructure that was constructed according to the 1990 Develoment Plan were foreshadowing negative future developments (Bademli, 1999). Besides, since the revision plans could be prepared and approved within the authority of the district municipalities, vast areas could be available for housing with no relation to the development plan decisions (Altaban, 1998).

The İvedik Industrial Complex which was the second biggest business project of the Middle East and the Balkans after the İkitelli was being constructed. The workplace and housing balance of the 1990 plan was totally upside down (Bademli, 1999). Unexpected developments began in Çayyolu, İncek and Nenek regions (Bademli, 1999). Gölbaşı was declared as an Environmental Conservation Area and, from then on, planned by a different authority (Bademli, 1999). At the same time the Ankara Ring Road, which did not exist in the 1990 plan decisions, was constructed by the General Directorate of Highways.

In 1984, the foundation of the Institution of Public Housing institutionalized the provision of public housing (Tekeli, 1998). The Ministry of Reconstruction and Housing that was founded as a specialist institution to direct the urbanization was abolished (Tekeli, 1998). With the acts approved in 1983 and 1984, the resources of the municipalities were increased considerably, the controls of the central government were decreased and the authority for preparing and approving development plans was transferred to the municipalities (Tekeli, 1998).

Researzhes made by Raci Bademli for Ankara 2015 plan, underline the differenciation between Ulus and Kızılay. While Ulus served mostly to low income groups and hosted the commercial and service functions, retail commerce and the storage units serving mostly the rural area; the commerce and the services in Kızılay were rather more prestigious in 1985. The central blocks of Ulus were developed towards the northwest. In addition to the increasing specialization of the Ulucanlar and Çankırı streets and the developments of the new *Hans* on the Rüzgarlı and Fevzi Çakmak Streets and on the İskitler extension, a development tendency toward İskitler is observed. In 1985, Ulucanlar and Çankırı Streets were observed to be highly specialized. The wood and coal depots and the body shops (*kaportacı*) were located on the Bentderesi Street. In 1985, the central blocks of Kızılay had developed towards south (Çankaya). In 1989, in this respect, Shopping, Business and Entertainment Center of Atakule was constructed at the end of the Cinnah Avenue. In 1985, the development of public investments went on the Inonu Boulevard and on the Eskişehir Yolu.

In the same year, the METU Planning Group prepared a policy plan and the **Ankara 2015 Structural Plan** studies were conducted. The main decision of this plan was the decentralization of the new settlement areas outside the existing topographical basin. According to the plan, decentralization would be within a 35-40 km. ring along the İstanbul road, Eskişehir Road and Samsun Road. The settlement areas would have populations less than 300,000. Besides with the diversified employment opportunities the labor distribution would be used as a tool for decentralization. The center and the parts of the city of Ankara would be connected with an effective road and railroad network, would be based on public transportation. The decentralization would be a star shaped with developments on main roads connecting the city to the surroundings.

The **Ankara 2015 Structural Plan** considers the 1990 Ankara Master Plan decisions. The new settlements areas which were opened to development after 1985 were the areas determined by the Master Plan Bureau. In this period, the implementations on the determined areas and the small scale plans were perpared. The projects of Etimesgut, Sincan Squatter Prevention Area, Batıkent, Eryaman, Çayyolu Housing Zone, Dikmen Brook, İmrahor Valley, Etlik-Kasalar, Portakal Çiçeği Projects were realized with respect to the 1990 master plan decisions (Akın, 2007).

According to the Ankara 2015 planning studies, the population is projected as 5,000,000 and basic employment as 902,000. The plan also proposed that the 27.5% of this labor force would be outside the urban macroform. It is assumed that the basic employment on the first ring of the urban center would grow faster, and with the increase of the basic employment, the housing areas in the center would decrease.

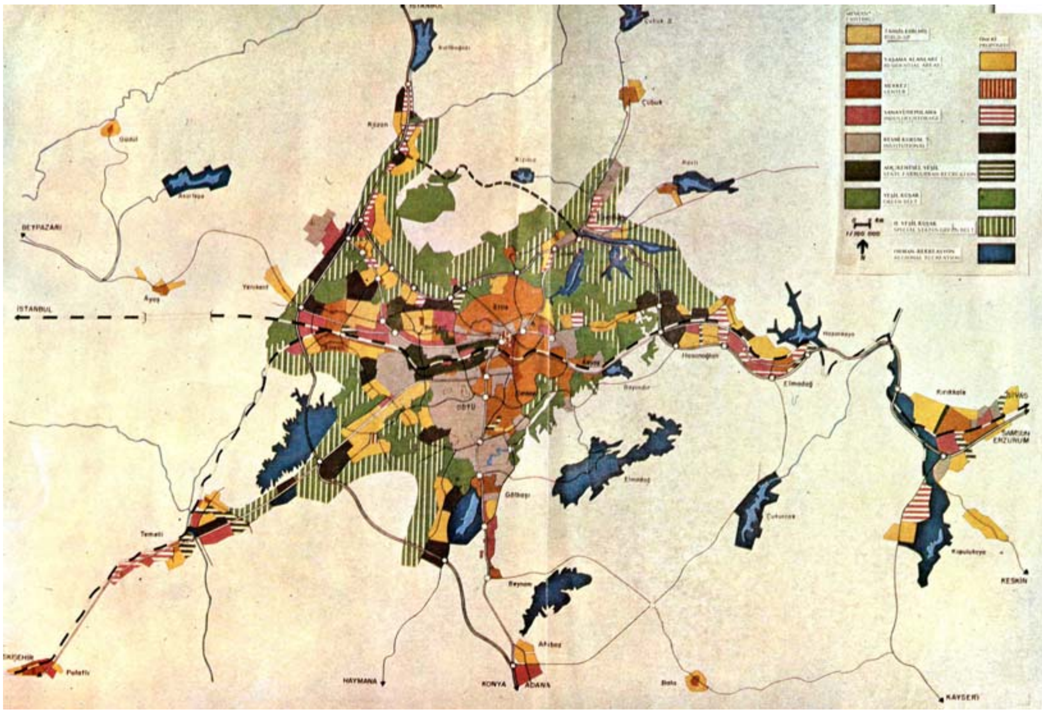


Figure 3.6. Ankara 2015 Plan

Ankara 2015 studies proposed high level of specialization on administrative, cultural, business and commercial functions for Ulus and Kızılay. In addition, multi dimensional development, renewal, revitalization and conservation policies and projects were proposed for these districts.

At the time when the planning studies were conducted, Ulus was considered to be advantageous in attracting the CBD functions. While the residential fabric surrounding Ulus from the north and north-east acted as social and topographical thresholds for the development of a center, the northwest of İskitler connecting to the dominant development corridor was an open development axis. The dense residential area surrounding Kızılay did not allow the densification of CBD functions in Kızılay. According to the plan, the business areas on the western corridor were to be diversified with the public services, institutional functions and relative developments. These developments were thought to direct upper income groups to the northwestern residential areas and to start a center dynamic beginning from Ulus to the west (Altaban, Bademli et. al, 1986).

2015 Structural Plan proposes a decentralized model with the solidification of the existing center (Altaban, Bademli et. al, 1986). The conservation and development projects for the Ulus historical center, the development project for Ulus business center, cultural center project and the underground route connecting Batıkent to Ulus and Kızılay were developed for this purpose (Alataban, Bademli et. al, 1986).

The location and distribution of institutional functions are significant planning decisions for the decentralization of the cities. In this respect, the public buildings, such as educational, cultural, health and research institutions were assigned to locate on the Eskişehir Road. The foreign representatives that were mostly on the Atatürk Boulevard were planned to move to the diplomatic complex which would be founded in Oran (Altaban, Bademli et al., 1986). The central administrative functions such as the parliament, the ministries and the relative institutions with intense public relations, however, were to be kept in the city center.

The planning studies revealed that the private car ownership was 38/1000 car/person in 1985 and the share in total car travels was 15%. This share was projected to be 135/1000 in 2015 and 30%. With the increase in the private car ownership, the squatter rings surrounding the city will be transcended and sub-settlements were formed (Tekeli, 1998).

The significant projects to influence the urban development:

- Batıkent housing development project
- New settlement project on the north of Sincan (around Eryaman)
- The second Squatter Prevention Zone for Sincan
- Çayyolu Mass Housing Project (by Ankara Metropolitan Municipality)
- Altınpark Recreational Development Project (by Ankara Metropolitan Municipality)
- Mogan Lake Recreational and Tourism Development Project (Cultural and Tourims Ministry)
- Two Hotel projects in Çankaya (by foreign investment)
- New Otogar Project in Söğütözü district
- Industrial development project in Osmaniye- Sincan
- Tusaş Akıncı Airport Project
- International flights in Esenboğa Airport
- Ankara canalization project

The Ankara 2015 plan is acknowledged with a protocol between the Ministry of Construction and Housing, the Governance of Ankara and the Metropolitan Municipality but it was not approved (Altaban, 1998). Besides, the institutions, which have the authority to prepare the planning stages, were set free (Altaban, 1998). However, the Ankara urban transportation studies were prepared with respect to the 2015 structural plan.

The key strategy of the Ankara 2015 structural plan was **decentralization**. Decentralization, here, was not taken as a normative stand of the study group but it was taken into account as an actual trend experienced in time (Çalışkan, 2004). This trend was supported by certain urban phenomena:

- Current tendency of public institutions to require huge campuses and to locate in the periphery.
- Tendency of large and small-scale industry to locate away from the center in the formation of organized industry.
- Decreasing influence of the petty-capital housing producers within the city and empowering housing production by housing cooperatives in the urban fringe.
- Rapid increase in private car ownership.
- More effective and common use of bus service by the institutions (ODTÜ Şehir ve Bölge Planlama Bölümü Çalışma Grubu, 1986).

In **1993, Ankara Transportation Master Plan** was prepared. That plan was principally based on the assumptions of the previous study (1985) and envisaged an extensive rail transit system for the year 2015 (EGO, 1993). In that study, four rapid underground routes were proposed: from the center to the south-west, north-west, north and south directions. Although urban population did not show any noteworthy changes between 1985 and 1990, a gradual increase was observed in the overall urban land coverage. In 1990, urban population exceeded 2.5 millions while the overall urban land covered more than 55.000 hectares. In addition, vehicle trips generated in the city exceeded 3 millions. At 2005, the population of the city has reached 3.5 millions and total coverage area has spread over 70,000 hectares (Çalışkan, 2004). Although this form of urban redevelopment is dominated by planning studies, the growth of the residential areas at the outskirts of the city is interdependent with the increase in the car ownership. (Zorlu, 2006)

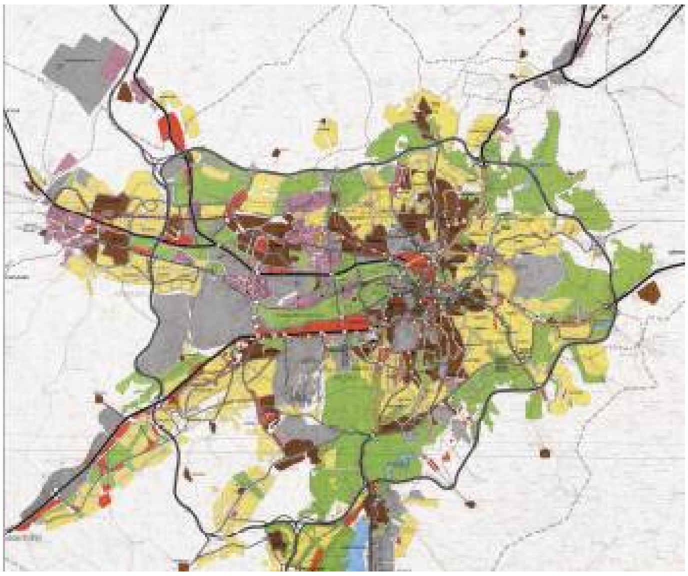


Figure 3.7. 2023 Transportation Plan

Since the urban rents are important sources for capital accumulation, the private capital started to involve in the investments made for the built environment (Şengül 2000). Especially beginning from the 1990s, shopping centers, 5 star hotels and business centers are located in metropolitan cities. In this context, with the (yap işlet devret) model of the Ankara Metropolitan Municipality (Ağaçlı 1999), the *Atakule Tourism and*

Commercial Center, Hilton Hotel and Convention Center according to the 2015 plan in 1989, Sheraton Hotel and Convention Center in 1991 and *Karum Business and Shopping Center* were constructed in Ankara.

Atakule Tourism and Commercial Center was the first shopping center of Ankara and was built close to the developing city center of Köroğlu Street and environs. Atakule, bringing different kinds of products and services together under one roof for the first time in Ankara became the showcase of the new life-style and the emerging consumer society and became the symbolic image of the new consumer ideology (Uludağ, 2004).

Following *Atakule*, *Karum Business and Shopping Center* was established in 1991 with the motto of 'A New Center in Ankara'. It was built as a part of the Sheraton Hotel complex. Like Atakule, Karum was also developed in one of the existing city centers of Ankara. The location of Karum is very important with two significant public parks (Kuğulu Park and Seymenler Park) around, and also the newly developed shopping street of Tunalıhilmi (Uludağ, 2004). In a single decade, both *Karum* and *Atakule*, changed their surrounding residential areas with commercial activities.

Interim Conclusion

After the import substitution policies, the concept of planned development was institutionalized and the legal and administrative framework was settled. The national economy gathered around the inner market protecting the local industry of imported commodities providing the continuity of economic growth was the basic condition of this process

In 1959, with **Regional Floor Regulations**, the development of Ankara were no longer taken through the plan but rather defined by the market mechanism. Local administrations could not resist the demands of capital and started a legal reconstruction process in order to keep capital within the city. The regeneration of the city centers has brought the loss of urban identity and memories along with them.

The Acts provided a new legitimation framework for the squatter areas which was not in accordance with the development plan.

Again in this period the problems in the planning processes of Ankara, and complications in the authority of the planning structure caused the production of various partial plans instead of comprehensive plans which created opportunity to market mechanism to create its own city.

In the 1970s, we see a dual center composed of Ulus and Kızılay, or two different sections of a center, where the relatively newer capital functions were settled in Kızılay. Besides the physical differentiation, there was a clear differentiation between the professions, income level and life styles of the inhabitants of Kızlay and Ulus.

1990 Development Plan foresaw that the spread of the central accumulations, especially the workplaces would lead to the spread of the residential areas as well. Similarly, the density of the housing area and the service sector would increase in the new development areas, and the shopping functions would develop in the existing and new sub-regions. But the administrative, cultural and specialized commercial functions would persist in the urban center.

According to the plan, Ulus was still important in the hierarchy of the centers and it would develop along the İstanbul Road in the Kazıkiçi Bostanları area which reaches the Konya-Samsun ring road. The tendency of spreading to the south was supposed to be prevented by using the vacant areas in the north and by evaluating the potentials for the development.

The abandonment of the import substitution and the organization of mixed economy model in 1980s provided the integration of Turkey with the global market and required the involvment with the globalization process. The state took on a passive role in the economy, the services began to be privatized and the mechanism providing the redistribution of social income by the state came to an end. The income gap between the poor and the rich grew tremendously. And also the policies giving more opportunities to actors and which change according to the strengths of the actors and the features of the place, were formed.The new approaches in the planning discipline, radical changes in the institutional structuring, new legal and legislatives regulations also constituted the base of a new spatial organization.

The Amnesty Laws eased the preparation of the revision plans for the squatters and illegal urban development areas gave way to the apartment block developments in the squatter areas, the acts increased the resources of the municipalities, the controls of the central government were decreased and the authority for preparing and approving development plans was transferred to the municipalities.

The differenciation between Ulus and Kızılay still continued. While Ulus served mostly to low income groups and hosted the commercial and service functions, retail commerce and the storage units serving mostly the rural area; the commerce and the services in Kızılay were rather more prestigious. The central blocks of Ulus were developed towards the northwest wherea the central blocks of Kızılay had developed towards south (Çankaya).

Since the urban rents are important sources for capital accumulation, the private capital started to involve in the investments made for the built environment. *Atakule Tourism and Commercial Center* was the first shopping center of Ankara and was built close to the developing city center of Köroğlu Street and environs. Atakule, bringing different kinds of products and services together under one roof for the first time in Ankara became the showcase of the new life-style and the emerging consumer society and became the symbolic image of the new consumer ideology. Following *Atakule*, *Karum Business and Shopping Center* was established in 1991 with the motto of 'A New Center in Ankara'. In a single decade, both *Karum* and *Atakule*, changed their surrounding residential areas with commercial activities.

3.3. Fragmented City Center of Ankara (1995-)

In 1994 local elections an Islamist Party, Refah Partisi (Welfare Party_ RP) won the administration of Ankara municipality. While the main actors of the central political arena were changing, the whole country was dragged into turmoil with an important incident was the first major economic crisis after the coup of 1980 in 1994, as a result of implementation of neo-liberal policies, budget deficits, increasing debts and populist policies (Şahin, 2007).

A year later ABB changed the symbol of Ankara from the Hitite Sun Statue to the Kocatepe Mosque and Atakule shopping center in Çankaya which shows the political and spatial changes in the city symbolically. From then on, the city will not be celebrated with the cultural and historical values but the shopping center that is a sign of capital and the mosque a sign of Islamist view.

The Old Logo **The New Logo**

Figure 3.8. Logos of Ankara

During this period decisions made in a national level contributed to the fragmentation processs of the city centers. Capital markets, free trade and production zones were founded and major reforms were made in the banking sector. As as a result of these developments, the importance of İstanbul compared to the other cities increased (Tekeli, 1998). Almost all the banks Garanti Bankası, İş Bankası, Akbank, Yapı Kredi Bankası moved their headquarters to İstanbul between 1990 and 1999. The prominence of Istanbul became further pronounced by AKP with strategies to carry Central Bank. Besides insurance companies and financial institutions underwent an agglomeration tendency to İstanbul in this period. Also the newly founded banks at this period (HSBC, TEBB) located their headquaters in İstanbul. Besides foreign company agencies and some national firms (Bayındır Holding, Çukurova) moved their companies to İstanbul and some foreign company agencies like Procter & Gamble, Loreal, Nestle, Roche were located directly in İstanbul.

According to the research report that ABB studied within the Ankara 2025 plan the boundaries and functions of the Ulus center were similar to those of 1985, whereas the Kızılay and Tunalı centers had almost detached and had fringed the southern part of the Tunalı center (Gökçe, 2008). Kızılay is functionally the most concentrated area within the center lying between Dışkapı and Köroğlu. In Ulus wholesale and production services, drapers, paper wholesalers, stores selling machine components and construction material suppliers compose the majority and the region is also specialized on textile, leather production and metal goods production. Kızılay reveals a specialization on textile, leather production, printing and publishing.

The most concentrated part of Kızılay was the region between Hitit Güneşi and Yüksel Street. Within the İzmir Caddesi, Gazi Mustafa Kemal Bulvarı, Atatürk Bulvarı triangle clothing services prevailed whereas between Atatürk Bulvarı, Mithatpaşa Caddesi, Ziya Gökalp Caddesi around Sakarya Street which has been pedestrianized in 1978 restaurants and entertainment services were placed. In the eastern part of Mithatpaşa Street office uses, in the northeast part of Kızılay square on and around Yüksel Street pedestrianized in 1982 and on Kumrular Street entertainment and cultural facilities prevailed, and also on and around İzmir Street there were travel agencies.

Along Atatürk Boulevard there were business and occupational services and public institutions like Tübitak, Local of Social Insurance Instutition, atatürk Culture Center, MNG Construction Co. ve TV8, Banking Regulation and Supervision Agency. As it can be seen there are important utilities which use the entire buildings on the boulevard which is a factor demolishing the relationship with the pedestrians. Akün Cinema on the boulevard has been transformed into National Theater building in 2004.

Beginning from the midof 1980s art galleries, international company headquarters, and prestigious service units like Hilton and Sheraton have started to search places outside Kızılay along GOP, Çankaya. Hilton Hotel was opened in Kavaklıdere in 1989 and Sheraton was opened on the corner of Tunalı and Arjantin Streets in 1991 with Karum, a business and shopping center. In 2004 an apart hotel and conference room has been added to this complex. In 1998 on the intersection of Atatürk Boulevard and Kennedy Street Ankara Çağdaş Sanatlar Galerisi has been built.

In Arjantin Street luxurious cafes, bars and stores selling foreign brands can be seen along with Sheraton Hotel complex. They are searching for places outside where everything is accumulated and which is economically prestigious. Because in these prestigious places the users display an effort to differentiate from "others", and to see and to be seen by alikes.

A structural analysis of Ankara's centers illustrates that although the northern parts of the CBD was surrounded by low-income group residents and transition zone activities, the southern part of the center surrounded by high-income residents, embassies, foreign representatives and public institutions. In other words, strong and prestige transportation infrastructure and high-income residents steered the movements of service activities from the beginning of the Republic (Bademli, 1987; Tekeli, 1998; Gökçe; 2003). For example while only French and German Cultural Associations are still in Kızılay, British Council has moved to Filistin Street from Kızılay and the American Association to Cinnah. While Ankara Trade Center has moved to Eskişehir Road in 1998, The Ministry of Finance left Kızılay for Dikmen, the Courthouse has moved to Sıhhiye, and eventually legal and financial services have showed a tendency to leave Ulus.

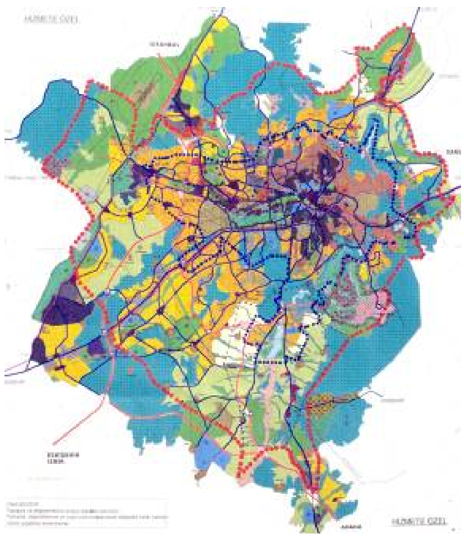


Figure 3.9. Ankara 2025 (Source: ABB, 2006)

2025 Plan was prepared in between the years of 1997 - 1998 based on the analysis of the existing situation, integrated to previous planning studies and keenly determined new development areas. It has been proposed to Metropolitan Municipal Council in 1998 but has not been approved. With this plan the authorization area that expands the influence area of the metropole was defined. A new contiguous area of 202.000 ha that lies until Temelli, Ahiboz and Kazan centers was determined. With the plan scheme of 2025 Plan under the mission to stop the partial developments and to control the unplanned developments, the framework of the structural plan of Ankara 2015 was developed. Although adequate housing stock was provided in a period when the population-increasing rate has slowed down, it concentrated in new residential areas as a result of exaggerated population projections. The 2025 Plan does not produce any proposals for the existing urban fabric and the city center. In other words, uncontrolled decentralization and market mechanism-based locational dynamics were the main keywords of the Plan (Gökçe, 2008). Ankara 2025 plan diagram represents an original image of certain planning process, which produces dispersed urban forms according to the dynamics of free-market mechanism (Çalışkan, 2004).

With the 2025 Plan almost all developable locations in the outskirt of the metropolitan built-up area are left to urban development without any significant criteria (Çalışkan, 2004). The main plan principles of Ankara 2025, which are related with urban form are as follows:

- Population projection of 7,200,000 for the whole metropolitan area of Ankara
- To avoid attending any new planned population to existing inner city, produced by Yücel- Uybadin Plan and keeping the population and densities of the areas constant within the areas formed by the plan. Rehabilitation of unbalanced population distribution by decentralization of congested/cramped functions in existing urban fabric to newly created nodes, corridors, axes and attraction centers.
- Support of the regeneration and transformation projects within inner city.
- Preventing further growth of industrial areas in existing crocks of development and decentralize them to peripheral areas of the city.
- Searching for the possibilities of the decentralization of military areas in the boundary of existing fabric, by their functions.
- Providing gaps as breathing spaces in a citywide open-space system within dense urban districts.
- Encouraging high-qualified sub-center developments in potentially developable growth poles and corridors.
- Developing housing estates in southeastern corridor of Eskişehir axis for high and high middle income families.
- Directing public foundations requiring large area usage towards the node of Elmadağ through Samsun axis. (ABB, 1998)

The locational choice of public institutions is a process that is shaped independently from both the municipality, and also the central government most of the time, and is made by the decision-making processes of the public institutions of themselves. In Ankara, public institutions are made to choose locations on the western axis, outside the urban macroform. In the 1990 development plan an area around Dikmen was proposed for TRT, but it has been moved to Oran. According to the decisions made in 1990 development plan, the embassies have also been moved to the diplomatic complex in Oran towards the end of 1990s.

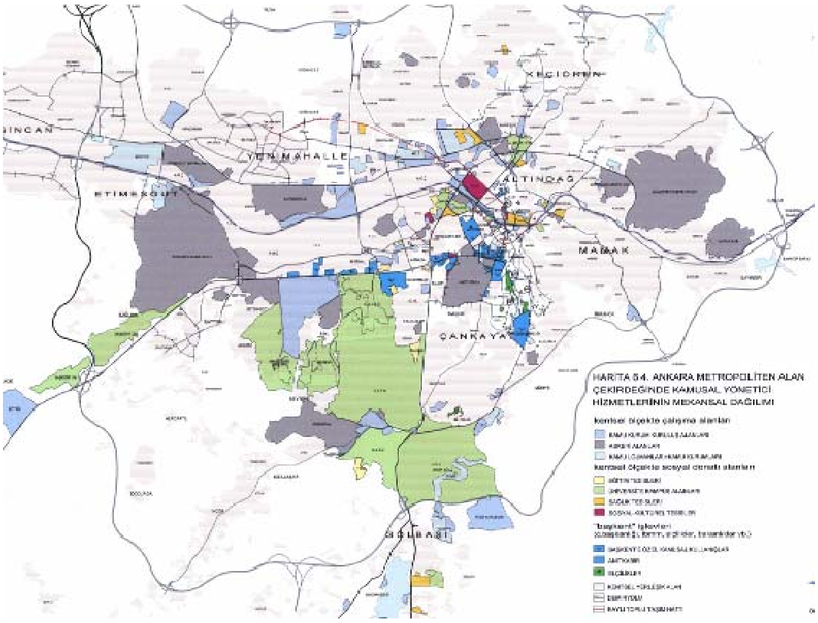


Figure 3.10. **Spatial Distribution of Public Services (ABB, 2006)**

(Source: ABB, 2006)

Of the 343 public institutions in Ankara 46.64% took place outside the city center by the year 2003. 95 of these were outside the city, and 65 were in the city but outside the city center. 26 of these institutions have moved outside the city center between 1986-2003.

The employment in direct relation with the public institutions also decentralize and form employment subcenters. Most of these are construction companies like Mesa, Yüksel and Başyazıcıoğlu, and the Political Party Headquaters like ANAP, DYP, MHP, AKP. In this period, the headquarters of Anavatan Political Party moved to the junction of Konya and Eskişehir Roads, DYP moved to Çetin emeç from Kızılay and MHP moved to Çetin Emeç as well. This moving out of the city is experienced as taking away all the functions with it from the city center, and they do not show the tendency of leaving the parts that are in relation to the public or the decision making parts in the city center.

Thus, this is a situation that triggers the fragmentation process of the urban center. The location choices of public institutions outside the city not only lead to the separation of the employees from the center, but also affect the location choice of business and institutions in direct relationship to these public institutions outside the city. At the same time, with the movement of public institutions outside the city, the investments in transportion and communication infrastructure also accumulated with this movement. Although the locational choice of public institutions is a process that is shaped independently from both the municipality, and also the central government most of the time, and is made by the decision-making processes of the public institutions of themselves.

In addition to the tendency of employment subcenters to break away from the city and the development of transportation as a support for this process, the increase in the number of suburbanization of the gated communities on the western, southwestern and northern axis affected the fragmentation of the center. Such groups that prefer living away from the inner city reproduce the concept of “gated” in the commercial and business environments of the city of Ankara. Thus, these groups do not prefer the city center as their workplaces or places to fulfill their needs.

The integration of workplaces and urban facilities with the national and international market, shaping of the relations according to their types and their locational choices, increasing mobility of capital on the international level, economic processes operating independently from the national scale, low land values outside the city, necessity of broad lands, strong transportation connections and the suburbanization caused the shopping centers choose their locations outside the city center. The first shopping center Atakule constructed in Çankaya and Karum constructed on Tunalı Hilmi are the first and last examples located within the city center.

While the traditional spatial patterns at the old city center, with its conventional commercial culture and the public life was still preserving its identity and existence, the new shopping malls were offering different identities, emphasizing a popular public life with a new spatial pattern.

After this period, the regional shopping centers constructed in Ankara were located on the western axis. At 1995, Ilk out-of-town shopping center Ümitköy Galleria were introduced in the growing suburban areas of Ümitköy, Konutkent and Çayyolu on the western corridor of the city. Ama büyük ölçekteki first example is the Bilkent Center made in 1998 in the Bilkent district that is formed with the Bilkent university. This center is not only a shopping center, but also residential areas, public and private workplaces, sports and recreational units are all gathered to create a sub-region that is self-sufficient. Besides the public institutions like TOKİ, Botaş, Rekabet Kurumu and RTÜK have all left their places in the inner city and moved here.

Only one year later, the Migros Shopping Center was opened in Akköprü, on the land of Meat and Fish Firm. The story of the construction of Migros Shopping center has a 6 year history. With the development plan prepared by the Ankara Metropolitan Municipality, the land of Meat and Fish Firm was defined as "urban service area". In the application development plan report the area between Ulus and Varlık Neighborhood was designed as CBD with reference to the 1990 Development Plan and with the realization of Ulus historical urban center project, the region would be turned into a commercial center. Within this framework, the construction of a shopping center in Akköprü was thought to accelerate these developments. Thus, the Akköprü Migros Shopping Center was made. This transformation caused an increase in land rents, the land market was affected and in the Varlık Neighborhood near the shopping center, there was an increase of density with a plan modification resolution (Eke, Sönmez 2003). The construction of the shopping center here did not only accelerate the transformation, but only caused a nodal, independent, self-operating and closed system. The shopping center could not be in an economic or commercial relation with its surroundings and could not transform it. This enclosed system is caused by the nature of the shopping centers.

These shopping centers were followed by the Carrefour Retail Trade Center constructed on Batıkent junction, on İstanbul Road, in 2001; and with Armada Shopping Center constructed on Eskişehir Road, Söğütözü District, in 2002. In the 1990 Development Plan the Söğütözü district was considered to be an appropriate area for the institutional uses and commercial services.

Apart from these, there is an authorization confliction on the national and urban transportation systems. The construction of Ankara Ring Road by The Ministry of Reconstruction and Development without consulting the municipality is a good example for this. More importantly since the ring road is constructed far away from the urban macroform, the land that is between the road and the macroform was made vulnerable to land speculation. The excess housing stock in Ankara did not create enough demand for the investments made in these areas so the demand was created by the evacuation of the existing urban fabric. Thus, these developments lead Ankara to become an unplanned urban center in multiple parts with cavities.

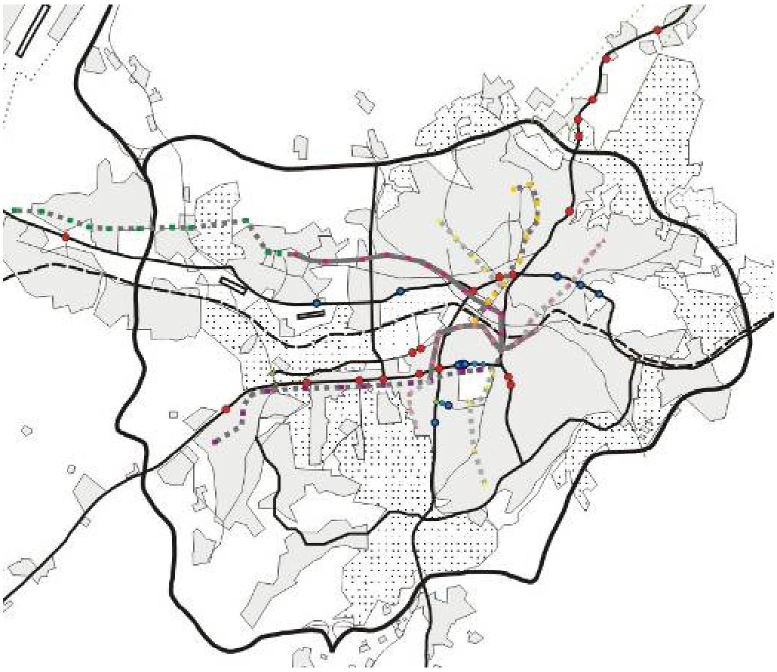


Figure 3.11. Spatial distribution of transportation investments of ABB in 2008
(Source: Data obtained from ABB in 2008, spatialized by the author)

Beneath all these is the concern of The Mayor of Greater Municipality, Melih Gökçek to keep the capital under his control and manipulate. With the effort of producing plans in accordance to this partial development plans covering large areas including ecologically sensitive areas were tried to be realized at the outskirts in the western corridor of the urban macro form in late 1990's and the beginning of 2000's (Şahin, 2007).

The lack and complication of authority in planning results in the production of partial plans where each institution produces based on its own interest. With the influence of the 2025 plan, the development on the southwestern axis (section between Eskişehir-Konya Road and ring road) was approved in the Ankara 1990 development plan partial revision prepared by Ministry of Public Works and Settlement and Ankara Metropolitan Municipality at the sacele of 50.000 in 2001. With these plans the star shaped development defined in the Ankara 2015 planning studies and the decentralization axis (Eskişehir Road, İncek, Taşpınar) were lost to a great extent. Besides with partial approaches investments were concentrated in the regions where upper-middle and upper income groups concentrated, as well as the infrastructure, transport and employment subcenters, and this supported the social and economic diversification to spatialize. Planning studies executed by the ministry, aroused radically the land market in Southwestern Ankara and environs and accelerated the transformation of the ownership pattern.

Ankara Master Plan Partial Revision Plan includes 107 separate development plans, (Çalışkan, 2004). Speculative movements gained speed and became widespread all around the urban macro form. Not only in the western corridor but in all directions new housing settlements started to emerge. This development started to exert pressures on the eco system and natural resources around the urban macro form. In addition, as a result of polarization and sociospatial fragmentation of the city and building of shopping malls, central business district started loose its quality of being a common space for all city. In a way, as a result of neoliberal policies, planning lost its directing initiative and majority of the population of Ankara became rent-seekers (TMMOB Şehir Plancıları Odası Teknik Toplantı, 2002).

By 2006 there are 5 more upper scale plans which have been approved in different years and which play an important role in the formation of urban macroform apart from Ankara Master Plan Partial Revision Plan. These are:

- Gölbası Özel Çevre Koruma Bölgesi Çevre Düzeni Planı_ date of approval 1990
- Kazan-Sarayköy Çevre Düzeni Planı_ date of approval 1993
- Temelli-Malıköy Çevre Düzeni Planı_ date of approval 1997
- Çubuk-Akyurt Çevre Düzeni Planı_ date of approval 2000
- Güneybatı Ankara Metropoliten İmar Planı_ date of approval 2004

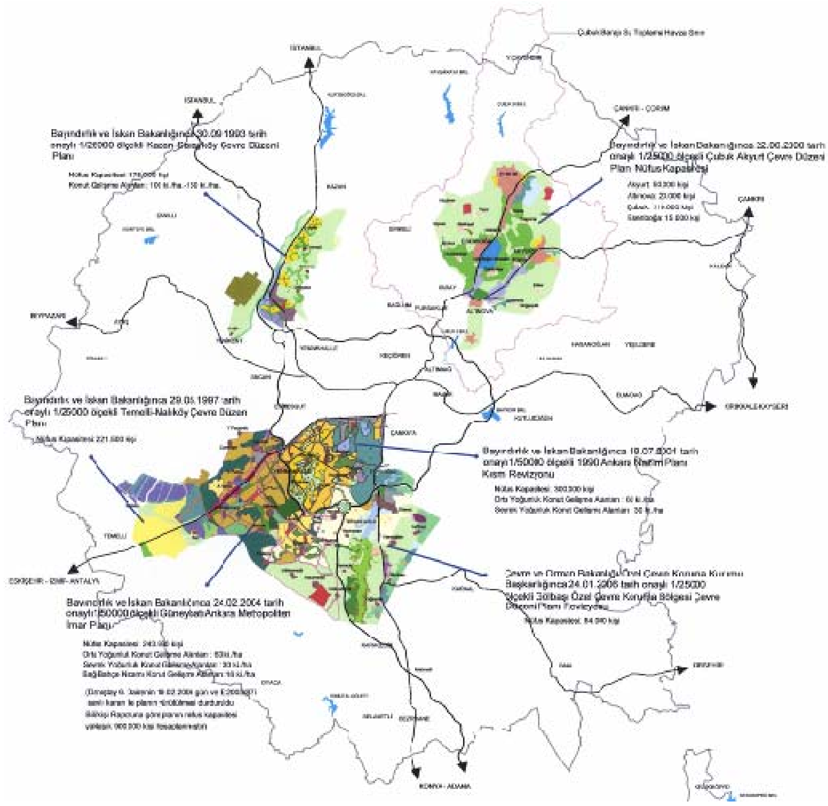


Figure 3.12. Current Plan of Ankara (Source: ABB, 2006)

Within this period, the new development areas of the city were considered, but there were not any decision made for the existing structure and especially for the urban center. No renewal, revitalization or conservation projects were made for the urban center. The infrastructure rehabilitation projects were very few and insufficient. The building stock was high, but the building quality was low and neglected. The historical urban centers are not appropriate for modern workplaces in terms of infrastructure and the size of the area. With continuously renewed sidewalks, exhaust, signboards, garbage and noise (car, street peddlers) pollution was over the limits. The aspiration for land rents, the stone and concrete built up environment formed as a result of the speculations and all kinds of pollution were felt in the urban center.

When we examine the land use within the central planning zone, it can be seen that housing areas have the highest density. As we move to the north, housing function is cleared from the center and some slum areas can be seen around Ulus. On the other hand, on the southern fringes of CBD and the soutern and southwestern parts of the central area housing utilities are concentrated even in some places in the form of prestigious housing areas. In the parts where housing has left the center some transitory functions of small scale production started to choose place. This tendency may also be seen with the textile workshops and other production places which have entered to the Kızılay part of CBD from the Sıhhiye direction.

The transportation investments are also being made to outer city instead of the urban center. Especially the highway extensions on Eskişehir Road, the junctions with bridges and the metro constructions all support the southwest development corridor. There are some highway investments for the İstanbul Road, Çetin Emeç Boulevard and Konya Road as well.

On the other hand, accessibility of the urban center is rather weak. Although junction and bridge constructions were made to provide the fast flow of vehicles to the center, there are still traffic congestion problems in the center. Also for the vehicles succeeding in reaching the center, there is the problem of finding available car park service. The sidewalks that have to belong to the pedestrians are used as parking space by the cars. Even the playgrounds of the schools in the urban center are used as parking spaces. Such a situation shows that the urban center is still an important attraction point, however the fact that there are not enough car parks in the center shows that the accessibility of the center is not considered as important. The Ankara Metropolitan Municipality has investments that support the transformation of Kızılay to a center providing the transit passage for vehicles, instead of providing priority for pedestrians and an accesible center.

Apart from all these discussions there is a confusion of authority among the Metropolitan and district municipalities on the issues of planning and implementation. There are 8 district municipalities and 8 (*belde*) town municipalities in Ankara. In order to get a share from the big capital there is competition and illegal practices of the municipalities in the CBD. In addition to that with the "code on the preparation and modifications of development plans" the authorization of preparing plans is assigned to the Ministry of Reconstruction and Housing. In the official gazette no 24220 published in 2000 with the "regulation on the preparation of environmental order plan" the approval authorization of plans is given to the Ministry of Environment (TMMOB Şehir

Plancıları Odası Teknik Toplantı, 2002). This added a new dimension to the confusion of authority. Apart from these, the Ministry of Forestry, AOÇ, Ministry of Culture and Organized Industrial Zones (*OSB)* have to be involved in the planning process at different periods. Each institution examines the situation from its perspective and priorities and produces solutions, but since there cannot be a common denominator, this causes problems in comprehending the city as a whole and solving the problems.

When the independent planning processes of the (*belde*) town municipalities like Bağlum, Pursaklar, Sarayköy, Altınova, Esenboğa, Kutludüğün, Sincan Yenikent and Gölbaşı Karagedik are added to this, important potentials that affect the population-employment balance in the whole city are created. The industrial investments that are close to the metropolis but are out of the metropolis in terms of their legal status choose Altınova, Sarayköy, Esenboğa ve Pursaklar municipalities to locate in when they are in need of using the "promotions" given for the investments. Also the transfer of Esenboğa airport which is the only international airport in Ankara and its surroundings to the authorization of Esenboğa Municipality in 1997 is very important in terms of the planning and authorization chaos of the whole city.

Because of the legal problems between the different plans, the planned environment is interrupted and urban development is shaped with the conditions of the market mechanism. Eventually a situation which prevents planned decentralization and which encourages fragmentation is produced.

Melih Gökçek, the Mayor of Greater Municipality seemed to benefit from this gap, developed urban transformation projects as well as fund raising projects in order to overcome the authority problem. For this reason, Gökçek has put weight on housing projects and neglected the urban center. In this period while Ulus and Kızılay urban centers were turned into physically and socially collapsed areas in terms of both the traffic organization and neglect, all urban investments have been made to recreation areas and the surrounding housing on the fringe of the city (Mutlu, 2007).

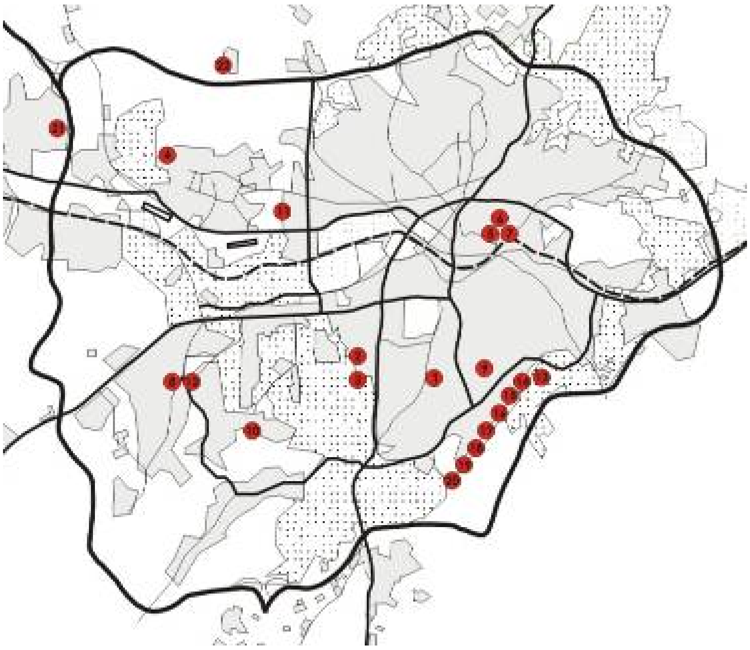


Figure 3.13. Spatial Distribution of Source Improvement Projects of ABB in 2008

(Source: Data obtained from ABB in 2008, spatialized by the author)

In urban redevelopment, the illegality, localization and privatization policies have been put together and used as a tool. For short term purposes, urban redevelopment projects considered as tools that can be implemented in most of the city are being seen as an alternative to urban planning (Mutlu, 2007).

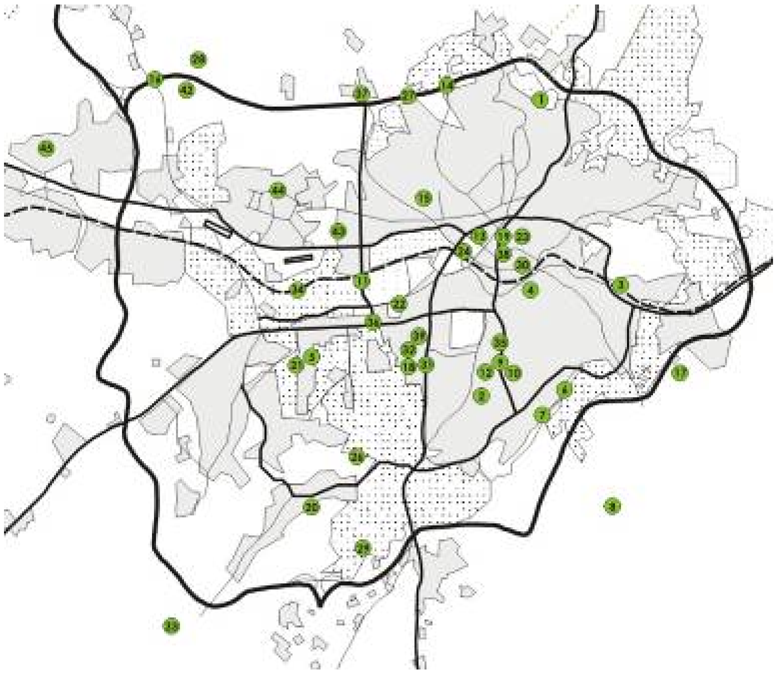


Figure 3.14. Spatial Distribution of Urban Redevelopment Projects of ABB

(Source: Data obtained from ABB in 2008, spatialized by the author)

Moreover, with urban transformation programs and a large program of housing production, squatter areas and the vacant land around the cities which could not be transformed because of the limitations of the planning legislation, started to be transformed into settlement areas by large capital holding firms and global real estate companies. The urban planning process became secondary to the direct derivation of urban rents through urban transformation projects. In a way, urban land rent distributed through petty builders and market mechanism started to be directly collected by partnerships between politicians and global capital (Şahin, 2007).

Until 2006 7 more shooping centers have been built in Ankara: FTZ, Arcadium, ODC, Optimum, Plaza, Planet, Dolphin, KC Göksu. Among these Optimum is an outlet center while the other 5 are small shopping malls acting as subcenters. Some of these have been built to benefit from the lack of subcenter in dense housing areas developed as piecemeal (Arcadium, Plaza, Planet, Dolphin), while others have used the lack of subcenters in the existing housing areas (FTZ, ODC). The other is a medium sclae shopping center in Eryaman which is the furthest from the city created as an alternative to the city center

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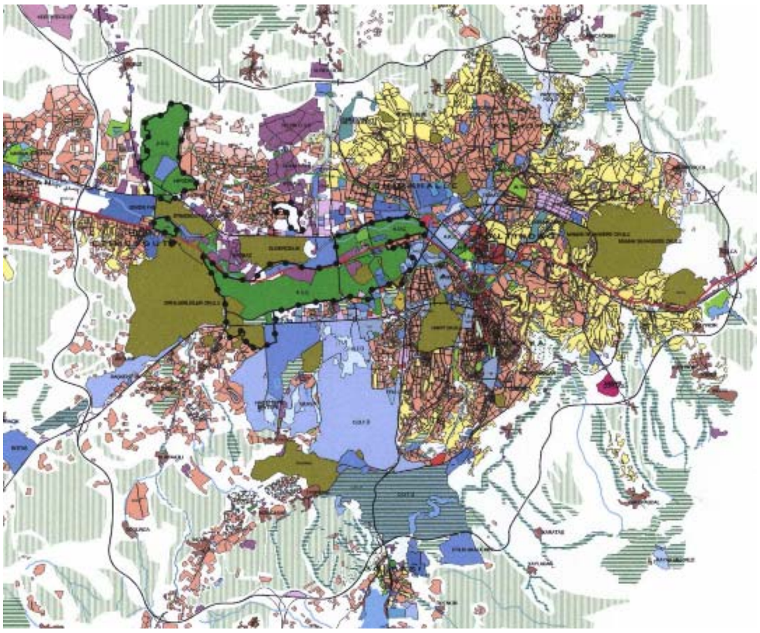


Figure 3.15. Urban land use of Ankara in 2005 (Source: ABB, 2006)

In 2006, in terms of the distribution of education and culture structures to districts Çankaya has the highest ratio. Yenimahalle, Altındağ and Keçiören follow this district. Again in health, social and sports facilities Çankaya has the highest ratio and Yenimahalle and Altındağ follow. While in Altındağ hospitals significant on a national scale take place, Çankaya and Yenimahalle stand out in terms of private hospitals, sociocultural facilities and the number of sporting facilities as well as the public institutions constructed for the same purpose.

Of the public institutions 42%are in Çankaya, 18% in Yenimahalle, 14% in Etimesgut and 10% in Altındağ. When we compare the districts in terms of the public and nonpublic institutional buildings to the entire buildings Çankaya, Etimesgut, Sincan, Gölbası, Altındağ, Yenimahalle, Keçiören, Mamak order may be followed. In this sorting Sincan, Etimesgut and Gölbaşı that are housing areas developed after the 80s attract attention because these areas are the subjects of mainly planned social facilities as well as some major public buildings.

When the total number of buildings in the district is examined, the existence of squatter settlements may be suggested. In Mamak and Altındağ districts with half the population of Çankaya there are 1.3 times more buidings than the most populated district of the city, Çankaya. This fact alone suggests the existence of squatters in these districts and defines the limitations of these districts in the development of central and productive functions (ABB, 2006). In the location choice of the service sector in the city and the housing of the employees in this sector a significant differentation can be seen. The managerial sections of the service sector are located on the western, southwestern and central parts of the city just like the qualified employees of these facilities.

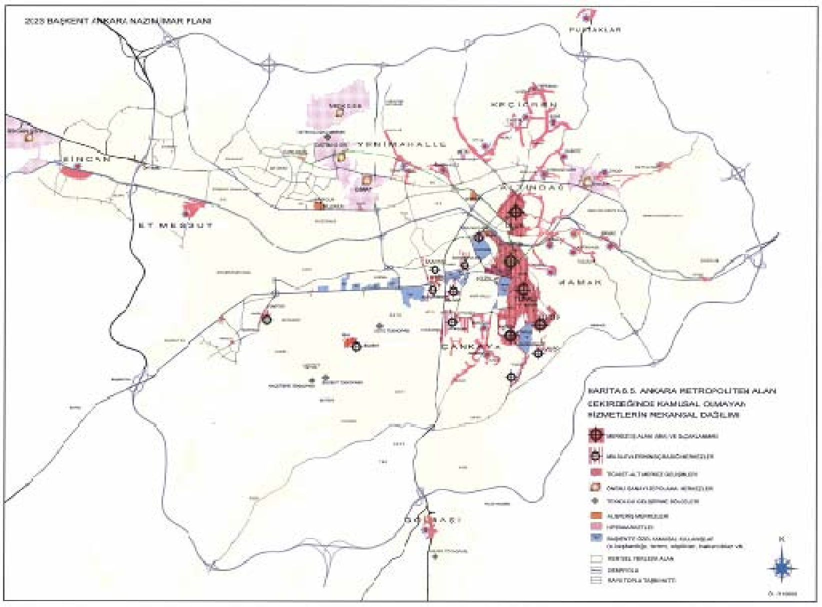


Figure 3.16. Spatial Distribution of Services which are not public
(Source: ABB, 2006)

In the eastern (Mamak, Elmadağ, Kalecik), and northern (Keçiören, Altındağ, Akyurt, Çubuk) regions where an important portion of the urban population resides, the development of service secto

r reveals itself in retailing defined as lower retailing and consumer retailing services. In this manner, northern and eastern parts of the city can be considered as the least developed portions of the city in terms of other indicators as well.

The central regions is composed of Ulus, Kızılay, Kültür, Devlet, Kocatepe, Maltepe, Bahçelievler, Kavaklıdere, Çankaya, Ayrancı, Öveçler, Balgat, Çukurambar, Gazi Osman Pasa, Seyran, Söğütözü, İncesu, Cebeci, Demirlibahçe, Hamamönü, Hisar, Yenidoğan, Altındağ, İskitler, Hipodrom, Varlık, Gazi, Çalıskanlar neighborhoods determined by Ankara Metropolitan Municipality Development and Planning Department.

Right after the law of metropolitan municipality 5216 approved on 10.07.2004 **2023 Capital Ankara** planning studies were completed by ABB at the year 2006 and approved in 2007. With this law, the municipality enjoyed the right to make plans in any scale and to approve them. 1/25000 plan covers an area of 850,000 hectares.

With the 2023 plan a compact urban form that could improve the existing pattern was determined. In the plan Ankara was expected to have a 6,000,000 population on the 100th anniversary of the Republic. With this plan it was projected that the population within the city would also develop towards the southwest corridor as well as the western corridor, concentrations in the district centers would be encouraged and instead of the spreading of the metropolitan city, development with defined focuses were planned. This was the objective of creating a polycentered city. ıf it is not defined accurately or if the proposals for the city center are not neatly addresses, it would accelerate the fragmentation process of the urban center.

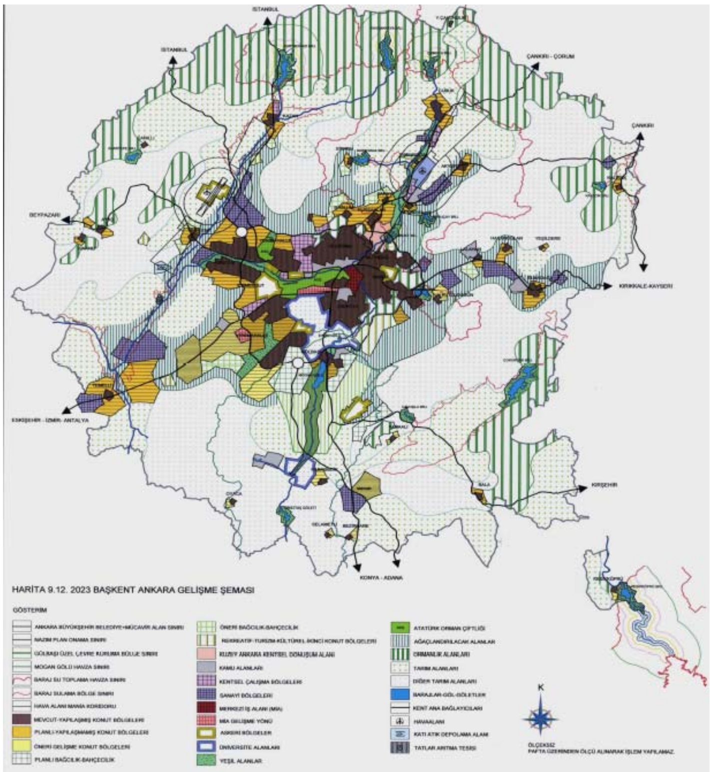


Figure 3.17. 2023 Capital Ankara Master Plan (Source: ABB, 2006)

While preventing the formation of a spread urban macroform, the developmetns of the corridors were planned to accommodate mixed uses like business, housing and recreations areas. In this respect in the important locational choices that may be significant in the development of urban macroform (like mass housing areas, big shopping malls, utilities in the form of campus) analyses on their impacts on the urban macroform will be considered. The impacts of such a plan on the shopping centers is general, independent from space and flexible. Eventually this has a capacity to control the fragmentation process and the spatial distribution of retail services.

The 2023 plan produced separate decisions for the center differently from the previous plans and presents these as Main Plan for Centers. The boundaries of this plan encompass the areas where center functions exist within the trade routes-regions and also the areas which accommodate central utilities although they do not have trade routes-region status formed with the Regional Regulation Plan.

It is proposed that CBD office functions to be placed around Dodurga in southwest Ankara and on the Eskişehir Road corridor and arund Mustafa Kemal neighborhood which have been defined as urban service and business area by the plan in action. While it has been defined in plan decisions as focus, CBD has been proposed on Eskişehir Road, in a region between Söğütözü and Bilkent and also in Bağlum Village. While "focus" means a central point, in the plan the urban center is not porposed as one but in three different parts of the city.

Besides 15 strategic subcenters have been proposed by 2023 Ankara Capital City Development Plan. These are: Bahcelievler, Demetevler, Cayyolu 8. Cad., Turan Gunes, Or-An, Batıkent, Eryaman-Goksu, Pursaklar-Saray, Siteler, Hatip Cayı-Mamak, Natoyolu, Beytepe, Tuluntaş, Sincan-Saraycık, Etlik Cad.- Ovacık, Susuz-Yuva.

Plan decisions have been produced for large shopping centers and hypermarkets which have not been defined clearly. Both were were just described as "the ones over 1,500m^2 closed area". Considering shopping centers and hypermarkets as similar in terms of their impacts on the city is improper. While the existing and under construction shopping center analysis was not made properly the research on the increasing shopping center trend has been neglected. The plan acknowledges that the allocation of shopping centers creates a problem, but some gaps have been left in the plan in order to preserve the attraction of the city in terms of these investments.

In the time that passed until the preparation and approval of 2023 plan eleven more shopping centers have been built in Ankara and nine more are under construction. Among these, three of them (Antares, Panora, Forum) are very large shopping malls in north-south direction with a size, location and functional variety that enables them to serve the whole city. The region where Antares exists has been defined as strategic subcenter and special planning zone in the plan. In such region it is proposed that "special planning studies that require comprehensive analysis and socio-economic and financial organizations..." should be implemented. Proposing research in an area which currently undergoes transformation and where the seconnd biggest shopping center is located is improper. In the area where Panora is located, there were TBMM quarters when the plan was prepared. Thus, the plan decision on the area suggests "other capital city functions". However, in 2005 it was obvious that these quarters would be demolished and alternative uses were considered. The region where Forum is located was proposed as urban service area. According to the plan in such areas “private and public institutions, trade and business centers, education and health facilities, car service stations, social, cultural and recreational facilities can be lcoated”. Under these circumstances investors could do whatever they found appropriate.

3.4. Evaluation

Ulus which is the first center of Ankara has been composed as the administrative control center, but with the movement of administrative functions to Kızılay, it has become a secondary urban center where housing of high income groups and bureaucrats also accumulated.

This dual structure that is based on the differentiation of consumption centers has been varied with the addition of new centers beginning from 1995. The most important factor lying under this fragmentation is the different life styles of different income groups and the location selections within the city. The efforts of different social groups in segregation from one another can be clearly seen in the consumption and business centers, which are located close to their residential areas.

The international and national capital accumulation processes; political concerns of governmental and local administration; transformations in the legal framework; development and partial plan decisions; and natural – autonomus development trends of the city of Ankara led to the fragmentation process of the city center.

CHAPTER 4

IMPACT OF SHOPPING CENTERS AND CHAIN MARKETS ON THE FRAGMENTATION PROCESS OF THE CITY CENTERS

In this chapter the retail decentralization process in Turkey is evaluated through the examination of shopping centers and chain markets. First the retail structure of the country is examined with the main focus on traditional and organized retailing. Then the national and international impacts beneath this transformation are discussed. The shopping centers and chain markets in Turkey are compared with the European counterparts. Finally, a thorough examination of Ankara chain markets has been introduced for the year 2008. Their influences on the city and especially the urban center are discussed.

4.1. Retail Structure of Turkey

Despite the fact that the retailing sector in Turkey is still dominated by a large number of small, independent, and single location retailers, large scale retailing market share have been increasing rapidly (Kompil, 2004). Especially in major cities of the country, international and domestic retail chains have been changing the urban retail hierarchy, restructuring the urban retail environment and imposing a transformation process.

The food retailing sector is fragmented and has neither horizontally nor vertically integrated (Kumcu & Kumcu, 1987). The street peddlers, traditional family-run groceries, and open-air public bazaars are three basic types of food retailing and are widespread all over the country. These traditional retailers are especially important in rural areas and small towns where modern grocery formats do not yet exist (Koç & Aksoy et al., 2007).

The spatial pattern and hierarchy of Turkish retailing is as follows: at the bottom of the hierarchy the basic three (butchers[1], greengrocers and groceries) are primarily located in residential areas, mostly adjacent to one another so that together they offer a richer merchandise mix. On top of the hierarchy sits the central business district. In the middle lies shopping malls, hypermarkets and supermarkets.

Figure 4.1. Groceries together

4.1.1. 1950 - 1980

Before the 1980s, the development policy of the country was based on import substitution. This policy gave rise to a scarcity of capital to finance the production of urban built environment as well as the provision for basic utilities in urban areas (Balaban, 2008). In this period the economic structure showed little responsiveness to changes in international circumstances. The business environment was protected and directed to the internal market, and there was an overall discouragement of direct foreign investment. This strategy delivered quite successful results in the early phase of creating an industrial base in consumption goods, as is indicated by the economic boom that the country experienced during the early 1960s (Boyacı, Tokatlı, 1998).

Governmental establishments gradually became inefficient over time as they were used as instruments for political favours (Kompil, Çelik, 2006). However, after the mid-1960s, it became clear that the strategy would not be as successful as it had been during the phase of producing intermediate and capital goods, due to the crucial dependency of

[1] Butcher is used for the Turkish word "kasap", greengrocer for "manav" and grocery for "bakkal"

domestic performance on the availability of imports. A deep economic crisis emerged in the late 1970s, when the oil prices and rampant inflation created problems for that strategy (Boyacı, Tokatlı, 1998).

When the country maintained a steady economic growth of 6 % per annum on average between 1950 and 1975 (Tokatlı et.al., 1998) income distribution deteriorated (Bulutay et.al, 1968; Bilen and Es, 1998) and subsequently the mass urbanization at the country began. Rapid migration from rural areas to urban centers took place as a result of a significant spatial segragation. Within thirty years, urban population increased from 18.5% in 1950 to 50% in 1980 (TUİK, 1983). An overwhelming majority of migrants moving into urban centers established low income households and became dependent upon the commercial food supply instead of self-sufficiency (Kumcu & Kumcu, 1987).

Under these economic conditions from the 1950s to the 1980s, despite a perid of economic development and urbanization, there was no change in the structure of retailing. Until the 1980s empirical evidences (in Kumcu and Kumcu, 1987) briefly show neither a decline in the share of small-scale retailers nor an increase in the share of large-scale retailers. Tokatlı et.al. (1998) and Boyacı et.al. (1998) define the dominant type of retailing as small-scale, capital-weak, independent and family-owned such as, groceries, greengrocers and butchers. Also, in order to deal with high inflation environment, the state encouraged the formation of consumer cooperatives, which included supermarket formats with municipal ownership and other types of retail (Tokatlı and Özcan, 1998).

The only organized retail investments in this period were the state initivatives. The first one was Sümerbank which was a state-owned company that included a commercial bank, textile manufacturing plants and consumer textile product stores. Then in 1955 Migros[2] which was a Swiss retailer cooperative was invited to invest in İstanbul in Turkey. Migros made its first sales via trucks, travelling from one neighborhood to another. (http://yenisafak.com.tr/Pazar/?t=30.10.2008&i=146736). In 1956 the supermarket Gima A.Ş., which included a textile department, a food department and an

[2] The country's largest conglomerate, Koç Holdings, bought the capital of the Turkish affiliate of Migros from the Swiss cooperative in 1975, keeping the right to use the name 'Migros' only in Turkey.

electro-domestic department, was established in Ankara as a state owned initiative, and sold textiles, electro-domestic and food products (Koç & Aksoy et.al., 2007).

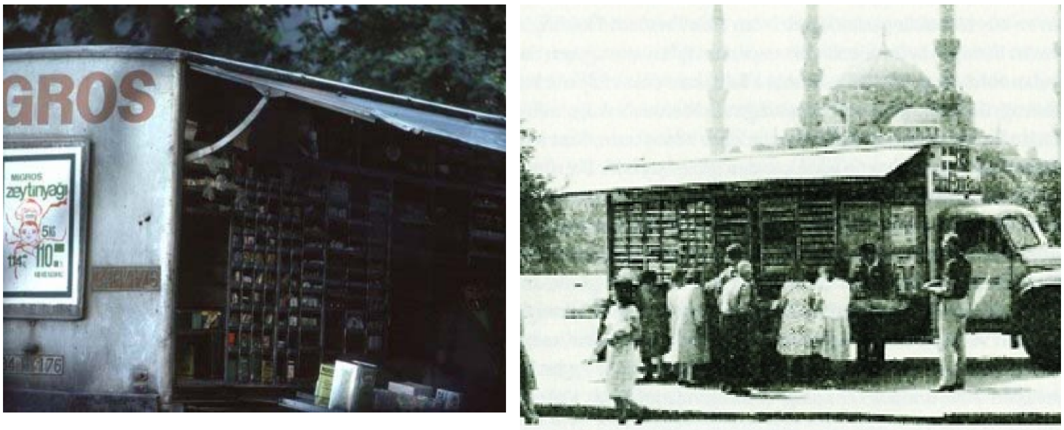


Figure 4.2. Migros sales via trucks

(Source: http://wowturkey.com/forum/viewtopic.php?t=15419&start=816
http://yenisafak.com.tr/Pazar/?t=30.10.2008&i=146736)

4.1.2. 1980 – 2003

The structural reform in the economy at the beginning of the 1980s, a liberal, market-oriented, and outward- looking development strategy, which aimed to develop the export potential of the country by recognizing and coming to terms with global competition conditions replaced the previous strategy and affected both production and consumption patterns in the economy (Boyacı, Tokatlı, 1998), and resulted in the rise of corporate power and the introduction of foreign capital through partnerships with Turkish firms (Erkip, 2005).

The state intervened in the urban processes with several new instruments and policies. Not only were new legislations, policies and institutional arrangements introduced but also the amount of public resources allocated for the production of the built environment and urban infrastructure was increased (Balaban, 2008).

After the 1980s the following progress and policies about the macro-economic situation and urban spatial structures were observed:

a. The national economy was opened to international markets and communities. Since exporting was accepted as the major instrument of economic growth, exports of domestically produced goods and commodities were promoted and encouraged (Balaban, 2008). Opening of retailing to international markets has provided the entrance of foreign investors into Turkey with either Turkish partners or by themselves. Thus modern retailing was introduced. The result has shown that imported products have opened new markets for consumption and these new products have brought new markets with them.

b. A rapid growth in the production of built environment, especially in housing production, was achieved through massive state intervention and support. Major forms of state intervention and support have provided for this of development, this include squatter amnesties, the foundation of a mass housing administration and mass housing fund, the decentralization of planning powers, the provision for substantial amounts of public finance to housing production and to infrastructure and transportation investments (Balaban, 2008). Growth of the built environment resulted with the expansion of the city and this caused the urban center to beccome insufficient. Thus, modern retailing spread to compensate the deficiencies of the city.

The export-oriented development strategy has introduced a proper retail growth environment by:

1. improving incomes from interest, rent and profits caused by the high growth rates of the economy with the main recipient being the urban population.
2. removing the initial restrictions and providing necessary governmental infrastructure and externalities for large-scale retailers to emerge and grow;
3. integrating with the international market and allowing import liberalizations which increased the variety of goods available in the domestic market;
4. cheating high cash flows while there is high inflation and in downgrading the nominal interest rate environment (Tokatlı and Özcan, 1998; Kompil, Çelik, 2006).

The urban population, whose share in the country's total population exceeded 65 % in 2002, has been associated with a disproportionate share of the increases in income, consequently indicating a transfer of resources from rural areas to large cities. The result has been a growing and sizable consumer market promising a large, steady and consistent demand for products, which has made Turkish retailing prone to increasing pressure from large domestic and international corporations (Boyacı, Tokatlı, 1998) especially concentrating on the few largest cities of İstanbul, Ankara, İzmir and Bursa.

4.2. Driving Forces Behind the Retail Restructuring

Urbanisation and closeness to the urban marketplaces: Turkey has a very fast-growing urban population, mainly due to rural–urban migration in the 1950s and 1980s. Only 29 per cent of the total population in 1970 was urban, while in 2007 it was 70.5 per cent (TUIK, 2008). There are ten metropolises (with more than one million inhabitants) and more than 100 cities with a population of more than 100,000.

Increasing per capita income: There has been an eight-fold increase in per capita income since the beginning of the 1970s. Even if there is a skewed distribution of income among the different socio-economic classes, this increase has a very positive impact on global consumption patterns of urban households (Koç & Aksoy et al., 2007).

Increasing percentage of credit card ownership: In modern retail the rate of using credit cards is higher than the traditional retail. According to the research conducted in Bursa by (2006)Koban, while the rate of using credit cards in modern retail is 76,6%, it is only 9,1% in traditional retail and 1,8% in markets (This study has been prepared in response to project call of AMPD in Bursa in 2006 for "Retail and Formal Economy").

Higher education level and demand for quality: The percentage of the population who had graduated from secondary school, high school, and university increased from (Koç & Aksoy et al., 2007).

Strategy of international actors and foreign direct investment: The first foreign investment in food retailing was made by the French company Prisunic who collaborated with the Municipality of Istanbul to open the BELPA hypermarket in the Merter district of Istanbul in 1990. Carrefour started its joint venture with Sabancı

Holdings in 1993, while the Dutch hypermarket chain Spar arrived in 1994. Kipa hypermarkets, a Belgian–Turkish joint venture, opened its first hypermarket in Izmir in 1995, followed by the Metro Group, which arrived in 1998. In 2003, the British company Tesco entered the Turkish retail market by buying the Kipa supermarket chain (Koç & Aksoy et al., 2007).

Government policies supporting the retail sector: Since 1985 successive governments have supported the modern retail sector, but mainly those with a certain format and size. The government's aim was to increase tax revenues thanks to greater sales while reducing the level of unrecorded commerce. In the mid-1980s government support was granted to business centers, entertainment centers that host social events, and to the construction of two shopping centers through investment subsidies, credits, and tax reductions. Among the different retailer categories, hypermarkets have been the major beneficiaries of increasing government support since 1992. In 1994, almost all government support was captured by the hypermarkets being established in large cities, partşcularly in Istanbul. Over time, retailers from other regions also benefited from government support, which was oriented mostly toward importing the technology used by hyper and supermarkets (Ozcan, 1997 in Koç & Aksoy et al., 2007).

4.3. Restructuring of Chain Markets

The restructuring began in Turkey's retail sector in the agro-food chains. It is documented that the food retailing restructuring process started with the foundation of Migros Türk in 1954 in Istanbul (as a joint venture between the Swiss Migros Cooperatives Union and the Municipality of Istanbul), Gima Department Stores in 1956 in Ankara (as a state parastatal), and Tansaş in 1973 in Izmir (a municipality-owned business in Izmir) respectively. Restructuring continued slowly until the 1990s, then gained momentum in the early 1990s and took off during the second half of 1990s and the early 2000s (Koç & Aksoy et.al., 2007). The true take-off of supermarkets in Turkey took place in the early 1990s with the arrival of Carrefour in 1991 and which established a joint venture with the second-largest Turkish conglomerate Sabancı Holdings in 1996 and its name become CarrefourSA in 1997 (Ozcan, 1997 and www.carrefour.com.tr in Koç & Aksoy et.al., 2007).

It is estimated that today, the share of modern retail is approximately 65% and traditional retail is 35% in Turkey (PricewaterhouseCoopers, 2007). Thus, the size of the modern retail sector may be calculated as almost 47,9 billion USD. The highest share in the Turkish retail sector belongs to the food sector with approximately 52,8% of the total sales (about 72,3 billion USD). The share of the organized retail sector within the food retail sector is yet about 16 billion USD. This sum includes the organized retailers as well (PricewaterhouseCoopers, 2007).

Hypermarket and supermarket food retail sales comprised about 40% of total food retail sales in 2002 and is currently approach 50%, but this figure is higher in cities where per capita income is above the national average, especially cities with populations of more than 1 million (Koç & Aksoy et.al., 2007). The number of active large food-retailer groups (local, national, regional, and global actors) is increasing, as are the number of stores, of new retail formats, and of department stores, as is national and local concentration. The top five food-retail chains have about a 40 per cent share of fast-moving consumer goods (Koç & Aksoy et.al., 2007).

Table 4.1. Major Retail Store Properties

Store Brands	Ownership	Retail Formats	Number of Outlets (2003)	Number of Outlets (2007)	2003 Market Share	2005 Market Share
Migros / ŞOK	Turkish	Hypermarket/ Supermarket/ Discount Stores	436	676	6.2	5
CarrefourSA / ChampionSA / DiaSA	French & Turkish	Hypermarket/ Supermarket/ Discount Stores	93	569	3.8	4.1
BIM	Turkish, US, Saudi Arabian	Discount stores	921	1707	3.7	3.1
Tansaş* / Makro	Turkish	Hypermarket/ Supermarket	193	253	2.5	
Gima / Endi**	Turkish	Supermarket/ Discount Stores	130		2.4	
Yimpaş	Turkish	Hypermarket/ Supermarkets	50	42	2	2.3
Tesco - Kipa - Kipa express	UK–Turkish	Hypermarket/ Supermarkets	5	56	1.2	
Metro	German	Cash and carry/ club centers	9	10		2.7
Real	German	Hypermarkets	7	11	1.2	N/A
Kiler	Turkish	Supermarkets	37	126	0.8	N/A
Afra	Turkish	Hypermarket/ Supermarkets	22	29	0.7	N/A
Pehlivanlıoğlu	Turkish	Supermarkets	N/A	89	N/A	N/A
Maxi	Turkish	Hypermarkets	N/A	8	N/A	N/A
Beğendik	Turkish	Hypermarket/ Supermarkets	N/A	12	N/A	N/A
Özdilek	Turkish	Hypermarket/ Supermarkets	N/A	8	N/A	N/A
Marketim Bin&Bir	Turkish	Supermarkets	N/A	92	N/A	N/A
Contour	Turkish	Hypermarkets	N/A	4 (2004)	N/A	N/A
Booker (JV)	UK–Turkish	Cash and carry	N/A	12 (2004)	N/A	N/A

(Source**:** Company websites, www.planetretail.net, PricewaterhouseCoopers, 2004; Koç & Aksoy et al., 2007)

* changed ownership to Koç Holding in 2005
** changed ownership in 2005 and renamed to CarrefourSA express
*** Acquired by Makromarket in October 2007

Although the foreign grocery retailers such as Metro, Tesco and CarrefourSA are increasing their presence, the domestic chain Migros[3] Türk remains the market leader.

[3] Migros Türk A.Ş. was purchased in February 14, 2008 by Moonlight Capital owned by BC Partners in UK

There are other local successful retail chains, such as BIM and YIMPAS, which are effectively competing with the global actors (Koç & Aksoy et.al., 2007).

Table 4.2. Types of Retailer and Their Number of Units

Type of Retailer	1997	1998	1999	2000	2001	2002	2003	2004
Organized Retailers	1682	2135	2421	2979	3640	4005	4242	4809
Traditional Food Retailers (groceries)	170580	167610	162170	149990	141790	135890	138820	137970
Total	187400	188960	186380	179780	178190	175940	181240	186060

(Source**:** AC Nielsen - Turkey Company Data in Ak Yatırım, 2003; Bocutoğlu et.al. ,2001; AMPD, 2007)

Table 4.3. Market Share of Retailers According to Their Types

Type of Retailer	2001	2002	2003	2004	2005	2010*
Organized Retailers	26.4	27.5	28.8	32.2	34	45
Traditional Food Retailers (groceries)	73.6	72.5	71.2	67.8	66	55

(Source: AMPD, 2007)
* estimated

The most easily observable transformation of Turkish retail structure has occurred in the floor-space size of individual stores. Large national and international corporations' retail activities tend to require large floor areas to accommodate the wider variety of goods they carry. Spatial requirements of large retailers are also different simply because self-service stores require more space for the same quantity of articles than do stores in which sales assistants attend to the customers. Accordingly, this trend is also true for supermarkets, hypermarkets and department stores. There were 4,809 organized retailers in 2004 in Turkish cities. The number is not very impressive for the country as a whole given that the same year there were over 137,970 traditional retailers in urban areas.

Table 4.2 indicates the change in the number of retail outlets and Table 4.3 shows overall market shares and gives an understanding of retail transformation.

Supermarkets first developed in the cities with more than three million people: Istanbul, İzmir, and Ankara. Recent investments have targeted medium-sized cities (population more than 600,000 or where the commerce, manufacturing, and tourism sector is intensive) such as Adana, Gaziantep, Bursa, Kocaeli, Konya, Mersin, and Antalya. Still, most of the large retailers are concentrated in the few largest cities of the country (Boyacı and Tokatlı, 1998).

Traditional local grocery stores, because they are convenient, will continue to play a major role in most large cities, but especially in rural areas. The modern retail sector has not yet developed in all parts of the country because income is very unevenly distributed among the regions and provinces. For instance, in many parts of south-eastern and eastern Anatolia, where some provinces produce less than 0.1 per cent of the gross domestic product (GDP), supermarkets are still the exception (Koç & Aksoy et al., 2007).

The Turkish retail sector is similar to the European market of the 1970s with its 65% traditional retail share (PricewaterhouseCoopers, 2007). However, while there are 150 supermarkets for every one million European population, there are only 3 hypermarkets and 17 supermarkets in Turkey (PricewaterhouseCoopers, 2007).

Besides the top three retailers have almost dominated the whole market (Sweden 95%, Norway 86%, Holland 83%, France 66%, Portugal 57%, Spain 42%) in other countries, whereas, organized retailers in Turkey are at the very beginnings of their growth phases (Turkey 11%) (AC Nielsen - Turkey Company Data in Ak Yatırım, 2003). In this case there are considerable similarities with some of the European Countries, such as Spain, Portugal, Greece, Hungary and Poland as well as some other developing countries. If Turkey keeps up with even part of what Portugal has experienced recently, the retail structure will continue changing as rapidly as in past decade (Tokatli and Boyacı, 1998; Kompil, Çelik, 2006).

Consolidation of large supermarket chains in large cities

The retail sector is faced with lower profits due to increasing inflation rates and competition. In order to reinforce the strength of negotiation, reach better scale economies and a larger consumer potential, the retail chains have to see a rapid consolidation. While the modern retailers have grown organically during 2003 and 2004, the consolidation estimated was realized in food retailing in 2005.

There are about 50 chains operating in the Turkish retail business (USDA, 2004). An important concentration process during the summer of 2005 deeply restructured Turkish retailing: Carrefour, bought the Gima supermarket chain and Migros acquired Tansaş supermarkets. At the same time, local players like Kiler, an Istanbul-based supermarket chain, bought 51 per cent of the capital of Canerler, the largest supermarket chain in the Ankara region (Kobifinans, 2005) and 100 percentage of Güler markets which has 14 branches in the Trakya Region 2006 (http://www.haber7.com). In 2003 the British leader Tesco also entered the Turkish retail sector by buying the Izmir-based medium-sized regional chain Kipa (Koç & Aksoy et al., 2007).

Finally, the domestic regional supermarket chain AFRA, based in Konya and with 35 outlets, is being bought by an Ankara-based domestic regional supermarket chain called Makromarket. The agreement between the two chains surfaced in October 2007. Before the acquisition by Makromarket, Nazar which was a domestic regional supermarket chained based in Ankara was bought. At this point the outlets had reached to 66. In September 2007 Makromarket also purchased the Uyum supermarket chain (based in Istanbul). After these acquisitions, Makromarket will have 130 outlets (www.makromarket.com). Further consolidation is expected and the market is likely to become increasingly more concentrated (Koç & Aksoy et al., 2007).

The modern retail market is being shared by four local chains along with numerous middle scale retailers composing almost 33.1% of the market. The chain markets are: **Migros** (it is active as the brands of Migros, Şok, Tansaş and Makro, in the form of hypermarket, supermarket and discount stores), **Yimpaş**, **Kiler** and **BİM,** the discount store, and three multinational firms: **CarrefourSA** hypermarkets, Gima supermarkets, Diasa and Endi discount stores, the **Metro** Group (Real hypermarkets and cash and carry shops) and **Tesco**.

Half of the 250 firms that are active in the organized retail sector sell clothing products, with the highest market share regarding to the markets with 38% of the total endorsement. 50 different chain markets are active in the retail sector of Turkey. While Migros is the first in the market category with 2,690 million TL consolidated endorsement, BİM follows it with 1,673 million TL consolidated endorsement. BİM is ahead of several market like Tansaş, Metro Cash&Carry, Gima and Kipa with this number. (http://www.sabah.com.tr)

According to the Global Retailers Report in 2008 there are 20 out of 250 global retailers in Turkey. Migros Türk (with the rank of 236) owned by Koç Holding, the largest conglomerate in Turkey, joined the Top 250 global retailers in 2008. Also the company became the 12th out of the 50 fastest-growing retailers between the years 2001-2006.

4.4. Shopping Center Market

The growth of shopping centers across Europe has facilitated the growth of modern retailing. Since the late 1950s 86 million square metres (m^2) of retail floorspace have been created across Europe through the construction of shopping centers. Countries that have seen the greatest proportional increase in shopping center floorspace over the last five years are almost exclusively located in Eastern Europe. (Court, 2008).

New shopping centers in Europe with a record 15 million square metres of retail floorspace will have opened by the end of 2008 according to the latest European Shopping CenterDevelopment Report from real estate adviser Cushman & Wakefield (Court, 2008). The annual figure is the highest since 1965 when Cushman & Wakefield began monitoring the introduction and growth of shopping centers in Europe. Looking further ahead, the development pipeline figure for the 18 months from July 2008 to the end of 2009 is even larger and stands currently at 26 million sq m with the emerging European markets of Russia, Ukraine and Turkey accounting for 58 per cent of the total (Court, 2008).

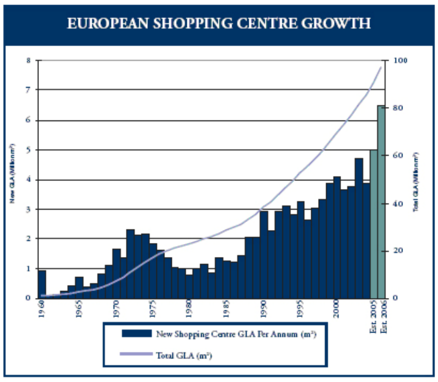


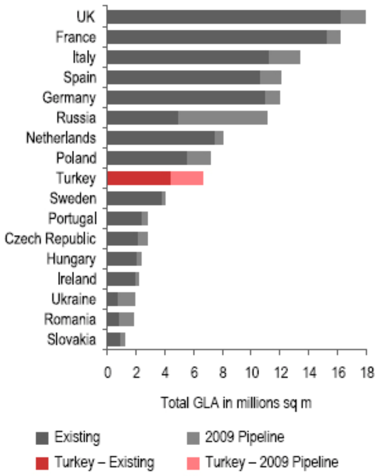
Figure 4.3. European Shopping Center Growth (Source: Court, 2008)

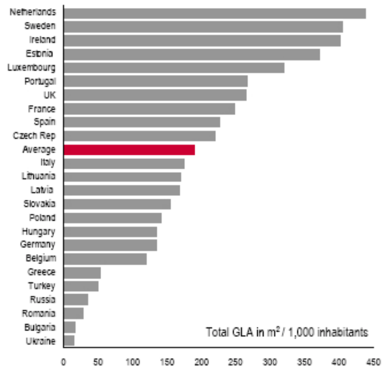
Despite the significant pipeline, Turkey is still well under the European average in terms of shopping centerstock per capita, and the strong demand from domestic, as well as increasing numbers of international tenants are expected to continue to drive rental growth in the prime schemes. (JLL, 2007) According to the Cushman & Wakefield (Court, 2008) and JLL (2008a) reports, Turkey's pipeline is significant with 70 new centers planned for 2008-2009, but the country is still well under the European average in terms of shopping centerStock per Capita which mean that new space is being easily absorbed into the market by both domestic and international retailers.

Table 4.4. European Shopping Center Pipeline
(GLA m^2; July 2008 – December 2009)

Country	**m^2**	**Percentage increase in provision of space**	**Population**
Russia	9,642,500	118.1	141,900,000
Ukraine	2,890,795	142	46,162,000
Turkey	**2,801,326**	**67**	**71,158,647**
Poland	1,450,000	25.9	38,518,241*
UK	1,249,291	8.2	60,943,912
France	1,236,542	8.7	62,177,676*
Italy	1,144,107	10.1	58,145,321*
Spain	1,021,922	10	40,491,051
Germany	931,690	7.5	82,369,548*
Portugal	839,677	33.4	10,676,910*

(Source**:** JLL, 2008, http://www.internetworldstats.com/europa.htm)
* December 2007





Total GLA in millions m^2 Total GLA in m^2 / 1,000 inhabitants

Figure 4.4. Shopping Center Stock and Shopping Center Space per Capita in 2008

(Source: JLL, 2008a)

According to the reports prepared by JLL in 2008, the huge scale of projected growth in Romania, Greece, Russia and Turkey with a low level of prime shopping centers is obvious. It is important to note that the ratio that consists the basis of the comparisons of shopping center and development is GLA per capita (thousand population). Thus, when we consider the relative retail market size of Turkey, it can be seen that although it is much higher than Hungary, Chez, Netherland, Sweden, it has an unsaturated market. Therefore, real values suggest that investments on shopping centers are still rational for a long period of time. This fact may be interpreted as the speeding up of the constructions of new shopping centers. However, consumption is closely related to national economy. Thus, real values may reveal an unsaturated market whereas the unbalanced distribution in the purchasing power and the high ratios of lower income groups endangers this assumption. Eventually we may suggest that if the rate of construction of new shopping centers persists, the number of dead malls will increase and contaminated built masses will be generated within cities.

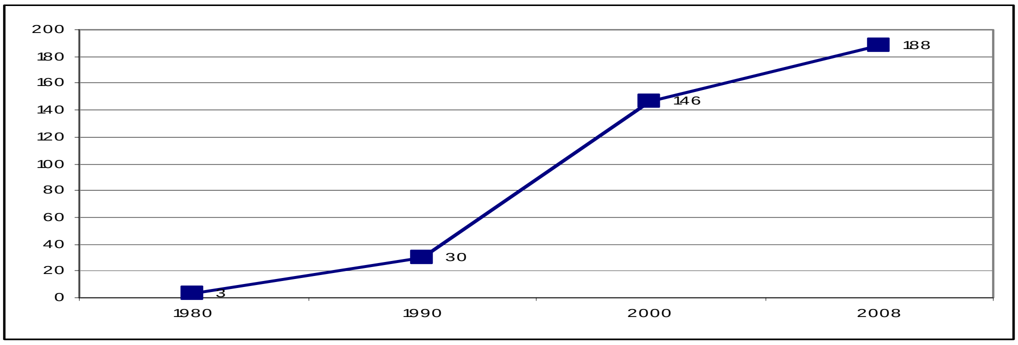


Figure 4.5. Number of Shopping Centers Increase in Turkey
(Source: AMPD, 2007; JLL, 2008b)

Before 1995 there were only in- town shopping centers in Turkey and had a very little GLA that of 190.000m^2. Later the out- of- town shopping centers started to grow and increased their GLA gradually. Following 1998, the rate of increase of the out- of- town shopping centers almost tripled the rate of the in- town shopping centers and reached a rate of 125,000m^2/ year. In 2003, the total area of the out- of- town shopping centers was 1,000,000m^2, and the in –town shopping centers was around 400,000m^2. In the Autumn of 2005 1,7 million square metres of retail shopping centerspace with a GLA per capita of a 23.58m^2 was built in Turkey, about half of which is in Istanbul. Over 60 new shopping centers are due for completion before the end of 2008. Today the GLA per capita is 57.4m^2 in Turkey, whereas it is around 200m^2 in Europe.

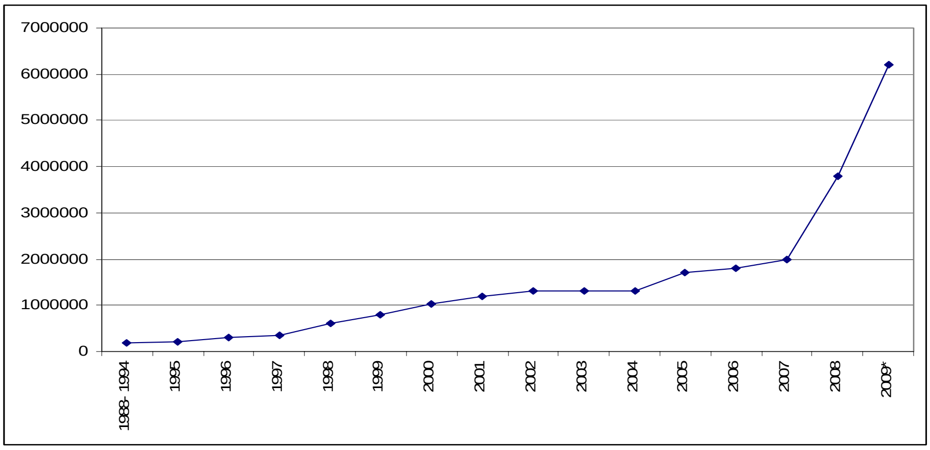


Figure 4.6. Total GLA of Shopping Centers in Turkey in 2003 (Source: AMPD, 2007)

The shopping center market in Turkey has seen significant development after 2007. The number of centers has increased by 33 since the beginning of 2007 and totalled 199 by the end of 2008 and over the next 10-15 years 300 new shopping centers in Turkey will be built (JLL, 2008b; AMPD, 2007). Istanbul leads the way with 61 centers, with a total GLA of 1,5million m^2. There are 43 shopping centers under construction and another 35 planned in Istanbul (JLL, 2008b). The AMPD research suggests that the opening of every shopping center creates around 1,000-4,000 new jobs and approximately 1,500 in one region. AMPD supposes that with the opening of new shopping centers in five years, at least 150,000 new jobs will be created. (AMPD, 2007)

Table 4.5. Shopping Center Development in Turkey as of the Beginning of 2008

	Operational	**Under Construction**	**Planned**	**Total**
Turkey	188	125	151	464
İstanbul	61	47	42	153

(Source: AMPD, 2007, JLL, 2008b)

It was not so long ago that the shopping center sector extended well beyond İstanbul and Ankara into secondary and tertiary markets. Turkey remains hugely underdeveloped in terms of shopping center space, as only a quarter of the average European per capita floor space (63 m^2 per 1,000 inhabitants as of the second half of 2008). Per capita stock remains considerably lower than in European cities that have comparable population and GDP per capita, but a number of shopping centerinvestors are critical about the current level of development freedom, which is leading to overdevelopment in some city centers. (JLL, 2008c)

The shopping center stock distribution among the Turkish provinces are as follows: 39% in Istanbul, 33%. Ankara, İzmir, Bursa, Kocaeli ve Antalya'da and the rest in Tekirdağ, Adana, Denizli, Konya, Muğla, Gaziantep, Eskişehir, Manisa, Mersin, Kayseri, Bolu, Kırklareli and Sakarya in the year of 2008 (JLL, 2008b). Despite the rapid pace of development, 57 of the provinces in Turkey do not have any shopping centers. Located mostly in the northern and eastern parts of Turkey, these provinces historically have had relatively low levels of economic activity. (JLL, 2008b)

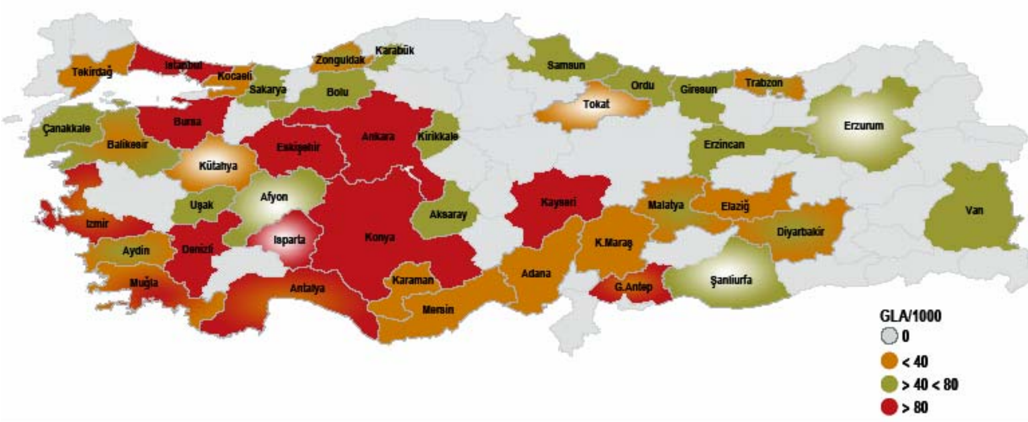


Figure 4.7. Shopping Center Density GLA/1000 population by province: February 2008 (Source: JLL, 2008c)

Provinces with a comparably higher market density of shopping centers (with GLA per 1,000 inhabitants over 80 m^2) include Denizli, Eskisehir, Konya, Antalya, Isparta, Kayseri and Gaziantep. These are emerging industrial centers with growing middle income strata, and thus still provide opportunities for developers and investors in spite of their relatively mature shopping center market. (JLL, 2008c)

Turkey’s shopping centerstock is expected to increase by over 2 million m^2 through 68 new schemes by the end of 2009, to reach nearly 6.7 million m^2. Most of the currently planned shopping centers were to be located in Istanbul, but since a slow down in development is expected here, developers will be increasingly focusing on the country’s regional cities, where the combination of growing purchasing power and expanding urban population will continue to attract retailers. Ankara and Antalya already have a significant number of schemes and there has been a debate about the potential oversupply in these cities, and to a lesser extent in Bursa and Kocaeli. Denizli and Eskişehir, currently have the highest per capita stock after Ankara and Istanbul. (JLL, 2008a)

There has been only 100 million dolar direct foreign investment in the sectors of wholesale and retail sectors since 2005 while by the end of 2006 it reached to 1.2 billion dolars (AMPD, 2007). Besides direct investments there have been transactions by local shopping centers by the foreign capital (http://www.haber7.com).

Table 4.6. The Major Shopping CenterTransactions during 2007

Property Name	**City**	**Estimated Purchase** (million Euro)	**Purchaser**	**Openning Date**	**Totoal Floor Area** (m^2)
Elysium Shops	İstanbul	10	Vastned	2006	4,850
Prestige Mall	İstanbul	55	Quinn Group	2007	12,000
Neo Shopping Mall	İstanbul	69	Merrill Lynch & Krea	2007	35,890
Adacentre	Adapazarı	48	Corio	2008	25,000
Zirvekent Shopping Centre	Ankara	32	Corio	2008	27,700
Teras Shopping Centre	Eskişehir	54	Corio	2008	46,500
Akkoza Shopping Centre	İstanbul	44	Corio	2009	45,000
Edip Shopping Centre	İstanbul	22	Corio	2009	65,000
Forum Kayseri	Kayseri	130	Union Investment	2009	66,500
Tekira Shopping Centre	Tekirdağ	30	Corio	2009	30,000
Acıbadem Project	İstanbul	6	Corio	2010	N/A

(Source: Deloitte, 2007)

4.5. The Overview of Ankara's Retail Structure

In Ankara it is possible to observe all the consumption levels existing in Turkey. Since it is one of the most populated urban settlements in Turkey and serves the nearby cities in terms of retail, the type of the shopping centers in the city vary from groceries to regional shopping centers. Furthermore, the size of the shopping center rental area per person of Ankara is the highest in Turkey and it has the second biggest shopping mall, Antares Shopping Center within its boundaries.

In Ankara, small size groceries continue to exist in every part of the city. However, according to the declaration of Ministry of Industry and Commerce (2008) from 2004 to November 2008 507,861 tradesmen have quit their jobs, and 911,852 tradesmen have started working. In Ankara in accordance to the general trend in Turkey small markets are spreading rapidly opposed to the groceries. While the number of groceries cannot be calculated, the number of chain markets has increased to 520 from 123 and the number of shopping centers has increased to 28 from 8 since the year 2000.

In order to continue their commercial lives and compete with the supermarkets, the groceries have to be located along with other small scale units (delikatessen, greengrocery, butcher, bakery etc.). However, the markets can either move with the shopping centers or compose independent units.

Furthermore, the insufficiency of the variety of products in the groceries forces them to choose locations within walking distances (see photos). Shopping malls and markets provide free transportation and provide carparks, thus may be located in the middle of nowehere.

After the 1990s the population of Ankara, and car ownership has increased (see Figure 4.8) (with the highest rate of 163.7 cars per capita in Turkey) (Motorlu Kara Taşıtları İstatistikleri, 2008). Mass transportation facilities (metro, light rail) and transportation investments have been made resulting in speeding up vehicular traffic; TOKİ's mass housing Projects and Ankara Büyükşehir Belediyesi'nin urban regeneration have increased both the mobility and urban dispersion. All these factors have caused a rapid increase in the number of independent commercial units and their locations outside the city center near the new residential areas

	population	number of cars
1985	2,304,166	84,384
1990	2,584,594	*207,000
2000	3,237,679	433,758
2004	3,481,522	556,924
2007	4,466,756	731,208

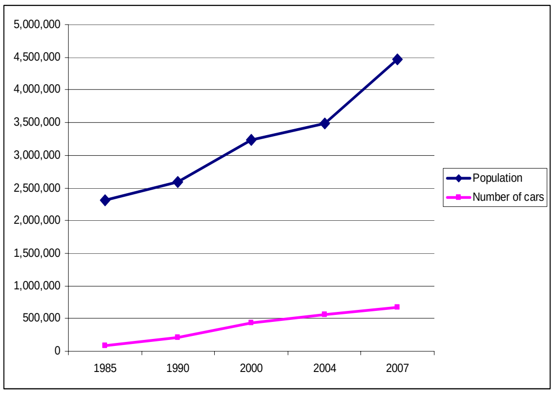


Figure 4.8. Population Distibution and Number of Cars per 1000 capita
(Sources: TUIK, 2000, EGO (1993), Motorlu Kara Taşıtları İstatistikleri, (2008))
*1992 values

Some markets and shopping centers have taken advantage of the development of residential areas with no center (i.e Arcadium). Also there is the creation of a "city within the city"; residential areas, business centers and shopping centers all provided by the same capital, forming their own customer potential (i.e Bilkent center). Also there are the ones providing different consumption space alternatives in order to accommodate the consumption habits of different income and cultural groups (i.e Panora – KC Göksu).

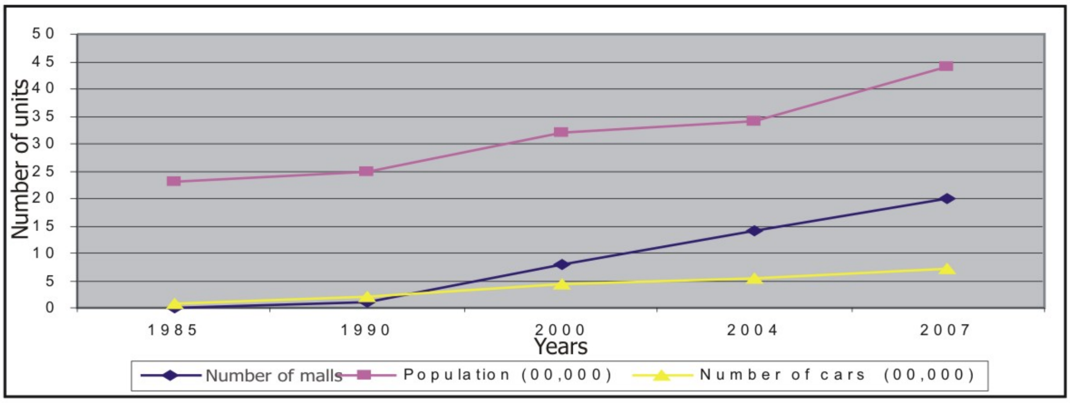


Figure 4.9. Increase in Population, the Number of Shopping Centers and Cars

4.5.1. Chain Markets

In 2008, in Ankara 22 chain markets of varying sizes (from hypermarkets to discount stores) are in service. Among them are Akyurt, Öğütler, Soykan, Meşhur Peynirci, Altunbilekler, Gimsa, Çelikler, Şekerciler, Başgimpa and Macit. There are local ones that cannot be found in any other city in Turkey. There are 526 chain markets in total. Five of these are bigbox Çetinkaya, Metro, Yimpaş, Beğendik; 19 are hypermarkets (Real, Kipa, Adese, 5M, Carrefour, 3M Migros); and 115 serve as discount stores and supermarkets.

Table 4.7. List of Chain Markets in Ankara

1999	**unit**	**2008**	**unit**
5M Migros	1	5M Migros*	1
3M Migros	5	3M Migros*	6
2M Migros	2	2M Migros*	7
M Migros	3	M Migros*	6
		Adese****	7
		Adesem****	8
		Akyurt	24
		Altunbilekler	34
		Başgimpa	20
Beğendik	3	Beğendik	2
Bildirici	2	*closed*	
		BİM	82
Binkoz	2	*closed*	
Canerler	17	*Bought by Kiler*	
		Carrefour**	3
		Carrefour Express**	8
Contour	3	*closed*	
Çağdaş	7	Çağdaş	32
		Çelikler	17
		Çetinkaya	1
Endi	4	*Bought by Carrefour*	
Gima	14	*Bought by Carrefour*	
		Gimsa	10
Gipa	5	*closed*	
Hacıbeyli	2	*closed*	
Hosta	4	*closed*	
		Kiler	49
		Kipa	1
		Macit	4
Makromarket	9	Makromarket	56
Metro	1	Metro***	1
		Meşhur Peynirci	37
Nazar	19	*Bought by Makromarket*	
Öğütler		Öğütler	15
Oypa	6	*Bought by Tansaş*	
Real	1	Real***	2
		Şekerciler	8
Şok	7	Şok*	33
Soykan	8	Soykan	32
		Tansaş*	21
Tempo	4	*closed*	
Yimpaş	7	Yimpaş	1
TOTAL	**136**		**526**

(Source: Aksel, 2000, Research Findings in 2008)
* belong to Migros Türk T.A.Ş. brand
** belong to CarrefourSA Carrefour Sabancı Ticaret Merkezi A.Ş. brand
***Metro Group
**** Adese A.Ş.

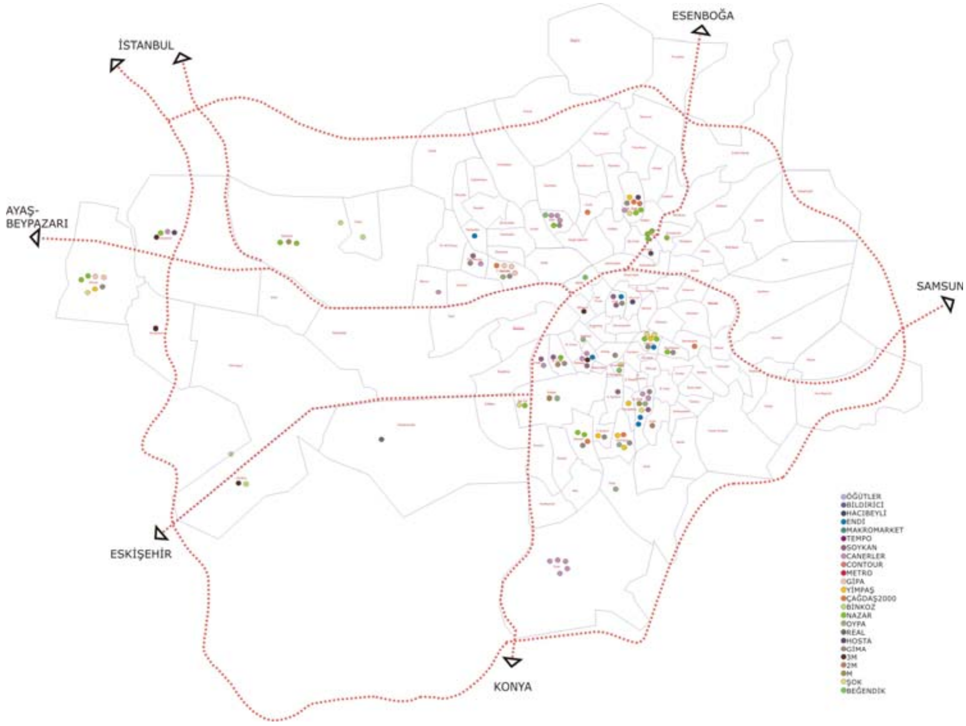


Figure 4.10. Chain Markets in Ankara in 1999 (Source: Aksel, 2000)

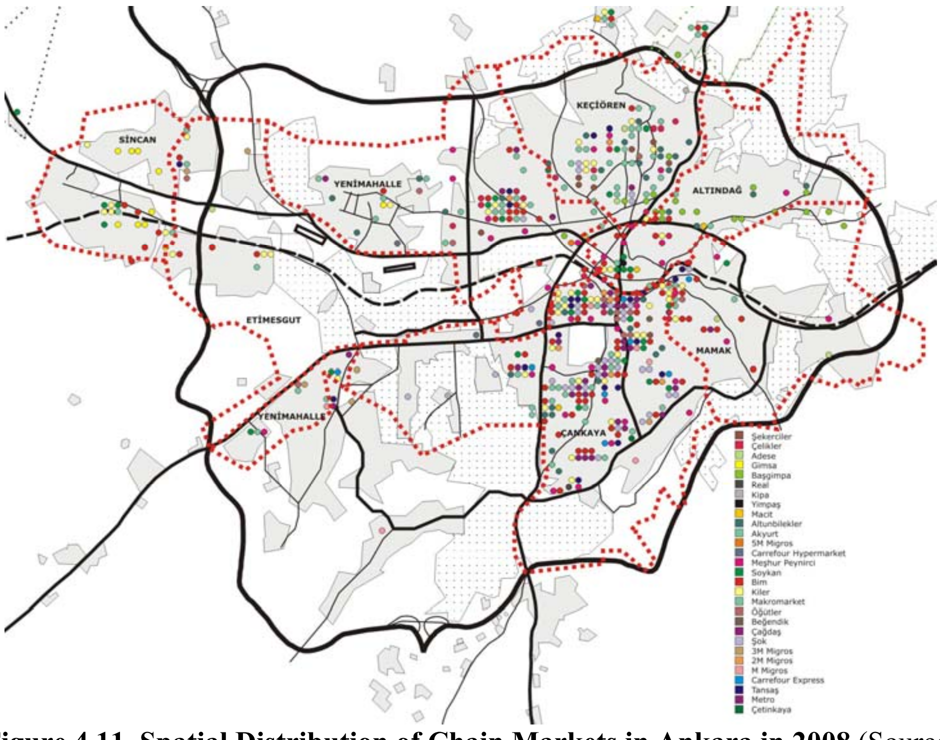


Figure 4.11. Spatial Distribution of Chain Markets in Ankara in 2008 (Source: Research Findings, 2008 August)

In 1999, in Ankara there were 21 chain market brands and 136 markets. Out of these 15 were bigbox, 11 hypermarkets, 7 discount stores, and the rest supermarkets. When the situations in the year 2000 and 2008 are compared, it can be seen that the number of markets have increased 3.86 times. While the number of hypermarkets has decreased by 2, the increase in the number of supermarkets is 355% and of discount stores is 1,542.85 %.

Çetinkaya, Metro and Yimpaş which are bigbox stores serve with one branch each in Ankara, located in Yıldız, Etlik and Ulus respectively. While Beğendik chose to stay within the city center with two branches, are in Kocatepe and one in Çankaya, the hypermarkets Carrefour with three branches, 5M Migros with one, Real with two and Kipa with one exist within the shopping centers placed on the main transportation axes. Carrefour hypermarket is located in the Carrefour Retail Center, Armada and Cepa, 5M Migros in Ankamall, Real in Bilkent Center and Forum and Kipa in Panora shopping centers. 3M Migros has with a total of 6 branches among which 1 is in Sancak, 3 in Çayyolu, 1 in Elvankent, 1 in Batıkent. Adese has with a total of 7 branches in Akköprü, Elvankent, Etlik, Keçiören, Natoyolu, Optimum Shopping Center and Mamak.

Şok and BİM which are both discount stores do not have any branches in southwest Ankara (except for the ODTÜ and Hacettepe campus branches of Şok) and Şok does not have any branches in northwest either.

Metro, Adese, Şekerciler, Başgimpa, Gimsa and Çelikler chain markets are only located in the northern part of Ankara whereas Kipa, Beğendik, M Migros, Carrefour Express, Çetinkaya are located only in southern Ankara.

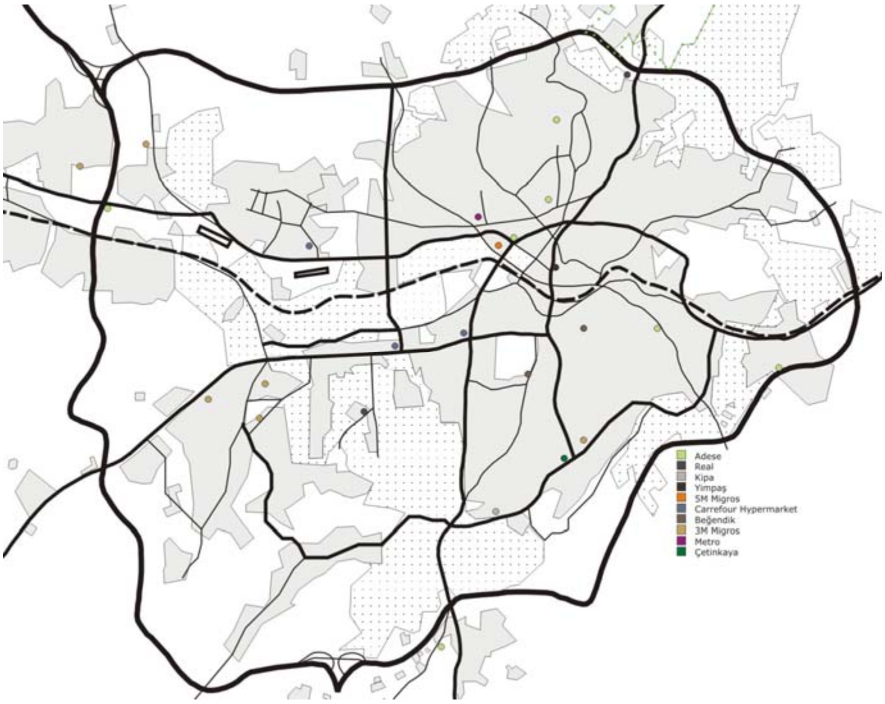


Figure 4.12. Spatial Distribution of Bigboxes and Hypermarkets
(Source: Research Findings, 2008 August)

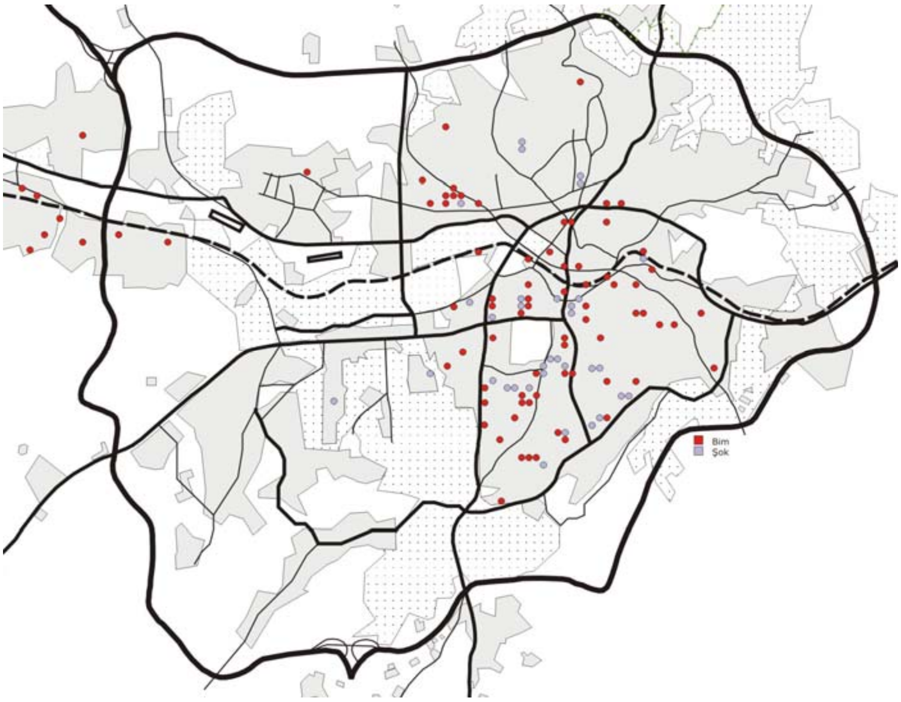


Figure 4.13. Spatial Distribution of Discount Stores (Source: Research Findings, 2008 August)

While Tansaş does not serve in Batıkent and Altunbilekler does not serve in southwest and northwest, Gimsa is only located in Sincan, Elvankent, Eryaman and Ostim.

Başgimpa, Macit, Şekerciler, Çelikler, Gimsa, Altunbilekler, Akyurt, Bim and Şok, with a total of 232 branches, do not have any stores in the southwest of the city.

There are 16 supermarkets serving the eastern part of Esenboğa boulevard and the northern part of Samsun-Konya highway. These are 2 branches out of 37 of Peynirci, and 14 out of 20 branches of Başgimpa.

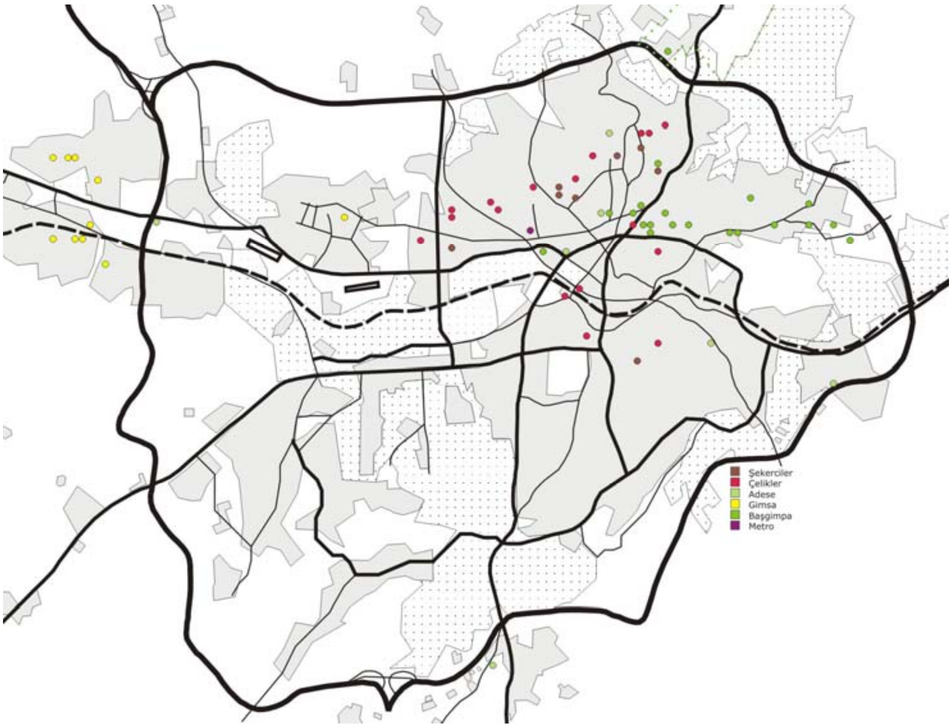


Figure 4.14. Spatial Distribution of Chain Markets Which Located Only at North
(Source: Research Findings, 2008 August)

Figure 4.15. Spatial Distribution of Chain Markets Which Located Only at South (Source: Research Findings, 2008 August)

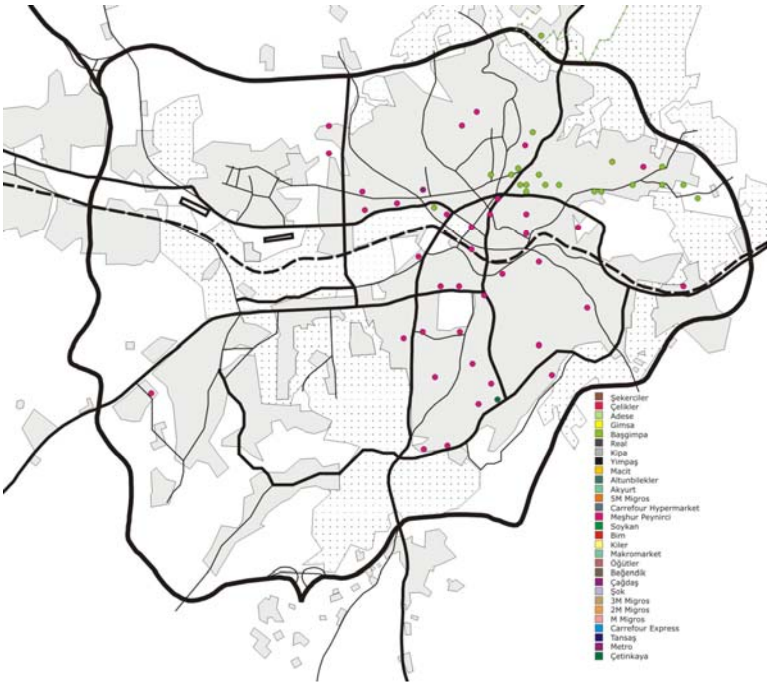


Figure 4.16. Spatial Distribution of Başgimpa and Meşhur Peynirci (located on east at most) (Source: Research Findings, 2008 August)

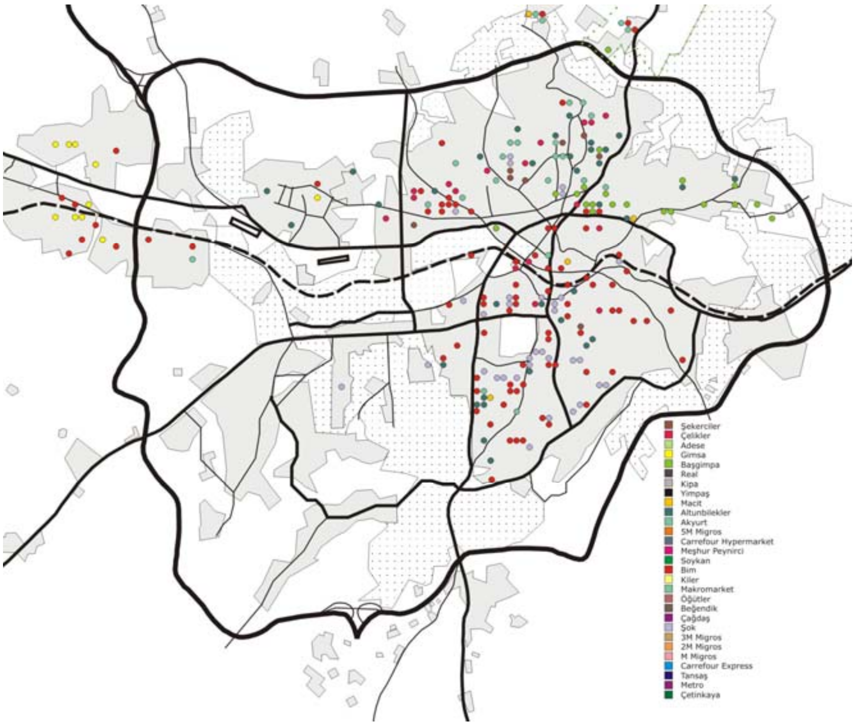


Figure 4.17. Spatial Distribution of Chain Markets which not Located at Southeast

(Source: Research Findings, 2008 August)

Table 4.8. Population Growth throughout the Years

İlçe Adı	1990	2000	2007	Growth Rate
Altındağ	422,668	407,101	370,735	**-1.34**
Çankaya	714,330	769,331	792,189	**0.42**
Etimesgut	70,800	171,293	289,601	**7.50**
Keçiören	536,051	672,817	843,535	**3.23**
Mamak	410,359	430,606	503,663	**2.24**
Sincan	101,118	289,783	413,030	**5.06**
Yenimahalle	351,436	553,344	614,778	**1.50**

(Source: TUIK 1990, 2000, 2007)

41.82% of the chain markets, namely 220 stores, are located in Çankaya. Yenimahalle follows this with 16.15%, and Keçiören with 79 markets, and 15%. 4.37% and 23 of the markets are in Sincan, 8.17% and 43 of them are in Altındağ, 7.41% and 39 of the markets are in Mamak and the lowest number of markets is in Etimesgut with 3%. When we analyze the spatial distribution of the markets under the light of Güvenç's study, it can be seen that the branches are mainly located in neighborhoods where wealthy employers are residing, thus economic wealth is much more effective on the location choices of the markets rather than population density.

When the chain markets are located close to markets and settlements where groups with high purchasing power live are the main criteria, or they choose central places where CBD activities prevail. The retail market in Ankara is shared by different chain markets. This division is related to the common cultural and social bonds between the customers and investors. This way both the brands that are sold and the types of products differ. While in the south more foreign products are sold in the markets, in the north locally known brands take place. Naturally this differentiation is reflected to the prices.

This figures shows what triggers the fragmentation of the urban center. It is a spatial demonstration of segregation in the retail sector. Both the customers from different socio-economic groups and the differetn brands that serve them do not coincide in urban space.

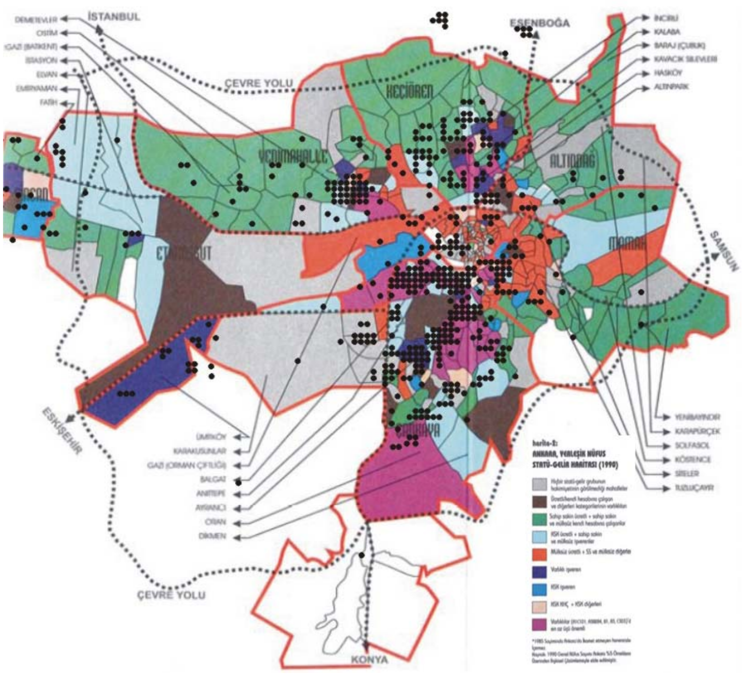


Figure 4.18. Spatial Distribution of Chain Markets and Socio-Economic Structure of Ankara (Source: Map of Socio-economic sturucture is obtained from Güvenç, 2001, chain markets are obtained from field study)

Interim Conclusion

Chain markets and especially hypermarkets are considered as indicators for the location choice of shopping malls. They evaluate the market locations in line with their target consumer profiles. Therefore, determining their locations may give clues on where the shopping malls will potentially be located in the future.

Hypermarkets and supermarkets constitute the origins of shopping malls. It should be noted that they are the reasons for the foundation of shopping malls. A shopping mall is supported with a supermarket or hypermarket according to its size. Sometimes a small shopping mall may choose to be located next to a hypermarket and benefit from its synergy. Supermarkets and hypermarkets satisfy daily and essential necessities, thus are units that are indispensible and the frequency of their visits is high.

Chain markets do not accommodate public and entertainment spaces like shopping malls but their management strategies are similar. Variety (product, brand), accessibility (proximity to transportation axis, customer transport facilities), customer satisfaction (promotions, campaigns, hygiene, security, carparks), competition between brands. Chain markets are not as strong to affect the dispersal of retail in the urban center. However, they certainly have an influence on the traditional retail in the center and the city in general. Besides it can be suggested that they reinforce social segregation. It can clearly be seen that organized retail considers, evaluates and shares the city of Ankara in four parts spatially and socially. Different firms serving different income groups choose to be located in places appropriate to their target customers.

In the central parts where accessibility and the accumulation of urban population is high, markets accumulate as well. Besides on the south west and north west axes urban sprawls are also places where the markets accumulate. Despite this especially the east and northern fringes of the city are weak in terms of markets services as in other service areas.

4.5.2. Shopping Centers

With the completion of the construction of 9 shopping centers by the end of the year 2009, Ankara will have 38 shopping centers within its metropolitan municipality.

Although Ankara is not in the pioneering position of İstanbul with the number of shopping centers (61), Ankara is ahead in terms of the m^2/1000 persons. The rapid development in the retail sector has led to concerns of possible saturation in certain markets. Although the total GLA in Istanbul is significantly higher than Ankara, the market concentration is higher in Ankara, at 210 m² per 1,000 population, compared with 118m^2 in Istanbul. But compared with Warsaw (500m^2) and Prague (400m^2), the density of shopping centers in Ankara is still relatively low. (JLL, 2008)

Ankara has the highest GLA per capita within Turkey. However, when we consider the shopping center projects, it can be seen that in 5 years the average of İstanbul will be higher than Ankara. According to the research and arguments of the leading real estate firms of Europe, the most important reason for the potential leading position of Ankara is it is a city of students and public servants. An advantage of being a city of public officials is that officers can get credit cards easily. Another reason is that, during the circumstances of an economic crisis, salaries of civil servants are still regularly paid and are guaranteed. This brings consistent consumption even in the time of crisis. As it has been mentioned in the previous chapter, many government institutions have moved to İstanbul from Ankara. This in turn causes a decrease in the number of government officials in Ankara. When we consider the numbers, it can be seen that there are 185.865 officials in İstanbul and 170,923 officials in Ankara (http://www.habervitrini.com/haber.asp?id=293682). Being a student city brings the advantage of students having more spare time and this is an important opportunity for the shopping centers. Another advantage of Ankara is that, it is easier and cheaper to find land in Ankara to construct the shopping centers.

Table 4.9. Shopping Center Development in Turkey

	Operational	Under construction	Total
Turkey	188	125	313
İstanbul	61	47	143
Ankara	29	9	38
Others	98	69	132

(Source: JLL, 2008c)

While the biggest shopping center in Turkey is the Cevahir Shopping Center in İstanbul with 118,000 m^2 rental space, the Antares Shopping Center in Ankara follows with 112,000 m^2. The demand for renting a spot in the Antares Shopping Center was over 3,000 requests when it was first established. Foreign investors had also applied to the management of the shopping center to buy it.

Table 4.10. According to International Standards for European Shopping Center Types

Format	Type	Name	Units
Traditional	**Very Large**	Ankamall Antares Panora Forum	4
	Large	CEPA Zirvekent 365 Malltepe	3
	Medium	Karum Armada KC Göksu	3
	Small	Atakule Galleria Ansera Ankuva Mesa Plaza FTZ Arcadium ODC Plaza Planet Dolphin Galaxy Galleria Eryaman	13
Specialized	**Retail Park**	Bilkent Center CarrefourSa Trade Center Üstün Dekocity	3
	Factory Outlet Center	Optimum Acity	2
	Theme-Oriented Center	Minasera	1

Today there are 29 operational shopping malls in Ankara: 4 very large, 3 large, 3 medium and 13 small. There are 6 specialized shopping centers, 3 retail parks, 3 outlets, and one theme-oriented center. The GLA of the shopping centers of Ankara is approximately 939,315 m^2 with 3,323 shops. Despite the 210 GLA m^2/1000 person average, Ankara is still below the European average.

Within a year an addition of 300,000m^2 shopping center GLA is expected to be added. Ankara features strongly in terms of potential and activity. Despite a large shopping center stock and pipeline, when compared to other Turkish cities, the capital city still has a rather limited modern retail offer when compared to Central European capitals such as Warsaw or Prague. (JLL, 2008c)

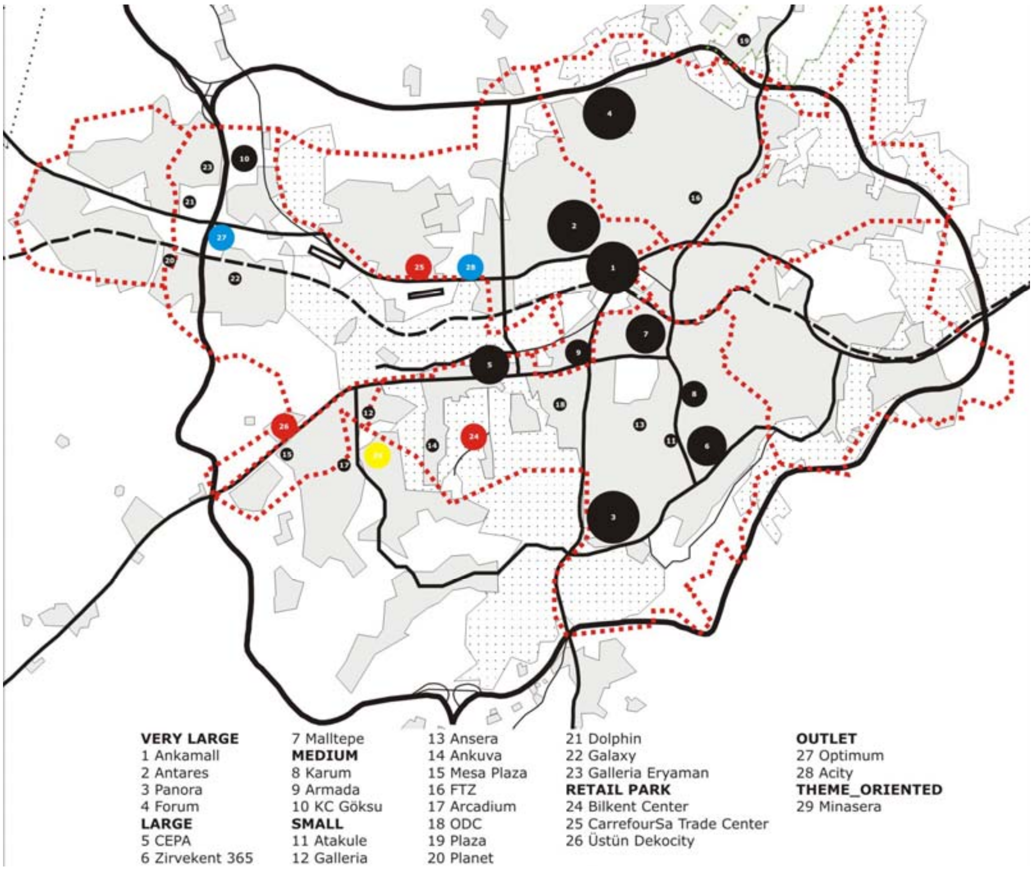


Figure 4.19. Shopping Centerstock in Ankara

The very large shopping centers have chosen locations within the city on the north-south axis along the main transportation arteries. Except for KC Göksu, other large and medium sized ones act similarly and are located along the western and southern axis outside the center. Smaller ones are within the city on the extensions of the center and in big residential accumulations ouside the center. Among the three retail parks some are located on the İstanbul road and others on the Eskişehir highway. The theme oriented Minasera is in Çayyolu in the southwest of the city.

While large ones are located all in the south, 75% of the very large ones have chosen their locations in the northern part of Ankara, and 75% of the medium sized ones are in the south, with one in Eryaman. Thus, 8 of the traditional shopping centers are in the North, 15 in the south and all the outlets are located in the north.

As mentioned before, basic location choice criteria of shopping centers in the city are based on maximum accessibility, along withbeing close to market facilities and available cheap land. When we examine the situation in Ankara it can be suggested that the location choices of shopping centers are rational for the investors. Especially very large, as well as large to medium sized shopping centers choose to be located on main arteries to maximize their benefits from the central locations. However, the issue of cheap land cannot be interpreted by looking at the existing picture. Especially the lands where the biggest shopping centers are located are produced by the privatization and transformation of land that are belonged to public institutions[4].

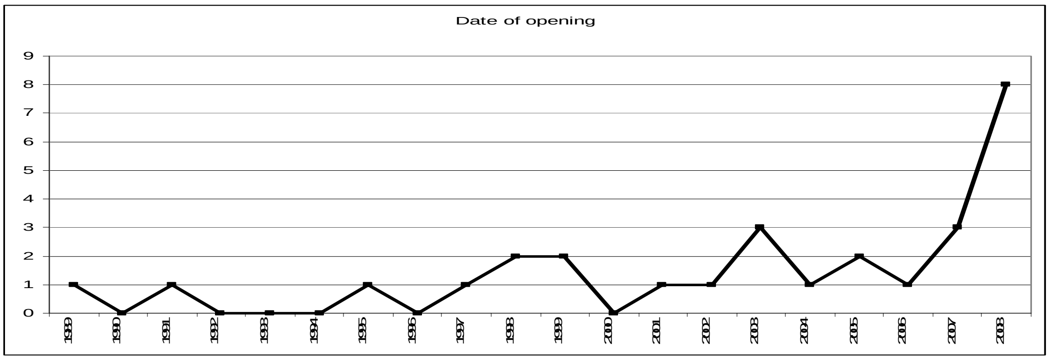


Figure 4.20. Date of Opennings of Shopping Centers

[4] Ankamall on the Meat and Fish Production Firms' Original site, and Panora Shopping Mall on the Turkish Grand National Assembly original housing property

In the years 2003, 2007 and 2008 an important increase may be observed in the opening of shopping centers. Of the 29 shopping centers, 14 have opened in these particular years. 28.6% in 2008, 10.7% in 2003 and another 10.7% in 2007. The first shopping center was founded in 1989. Any of them has been opened in 1992, 1993, 1994, 1996 and 2000.

There are 416.228m^2 GLA in the North while 523.087 m^2 GLA in the south. There are no shopping centers in Mamak, Altındağ and Sincan. Yenimahalle with two very large shopping centers has the highest average with 532.46m^2 GLA/1000 capita. Çankaya follows it with 486.52 m^2 GLA/1000. In Etimesgut where there are 7 shopping centers GLA/1000 capita is 351.79 m^2, while Keçiören has the lowest average with 1 very large and 1 small shopping center and 103.13 m^2 GLA/1000 capita.

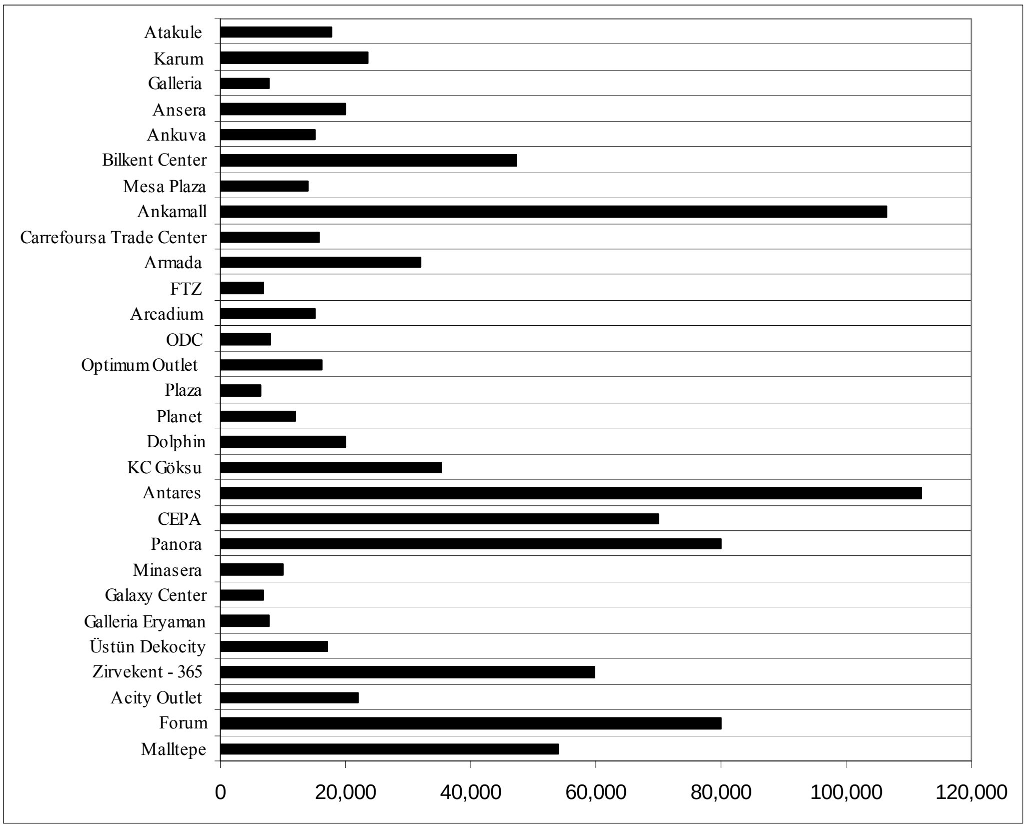


Figure 4.21. GLAs of Shopping Centers (ordered according to the year of opening date)

When the capacities and the number of units that the shopping centers use at the moment are compared, different outcomes may be observed. While some shopping centers seem to have lower number of stores than their capacities, others seem to have higher number of stores. It is easy to explain why the number of stores seems more than their capacity. These come from the kiosks and the extra rental space obtained especially in the closed parking areas. Another reason comes from the division of store areas to contain a higher number of stores. It can easily be suggested that these shopping centers are popular and the demand for rent is high. Bilkent Center, Armada, Optimum Outlet, CEPA, Galaxy, Galleria Eryaman may be considered among such shopping centers.

It would not be right to make a general evaluation of the shopping centers with units below their planned capacity. Each one should be evaluated according to its own circumstances. That is because this is generally a normal situation and means that there are tenants using vast areas within the shopping center. Sometimes this may mean that some stores are not rented. This situation where the shopping center works below capacity does not always suggest a negative situation, but it may only suggest poor marketing strategies. An example for this named be the Maltepe and Üstün Decocity shopping centers. While Ansera, Ankuva, Plaza, Planet and Dolphin are becoming “dead malls”. Besides the economical crisis mistakes in location choice, conflict of store profiles with other shopping malls, managerial faults (eg: failing to obtain the mixuse balance with store sales, campaigns, promotions and services) and lack of mixuse (eg: activities apart from retailing that can attract customers) may be stated as reasons of operating below capacity while Ankara is still not saturated with shopping malls.

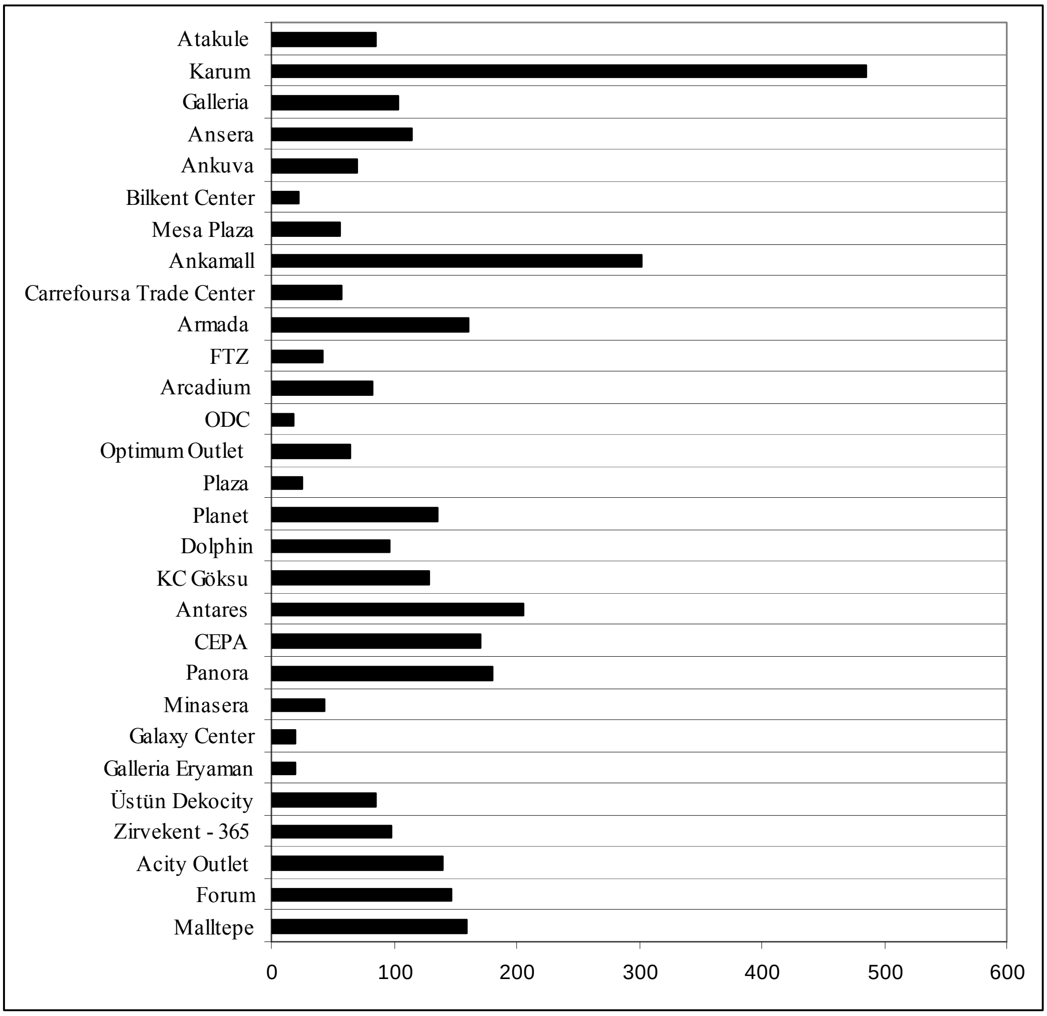


Figure 4.22. Number of Unit Capacity of the Shopping Centers (ordered according to the year of opening date)

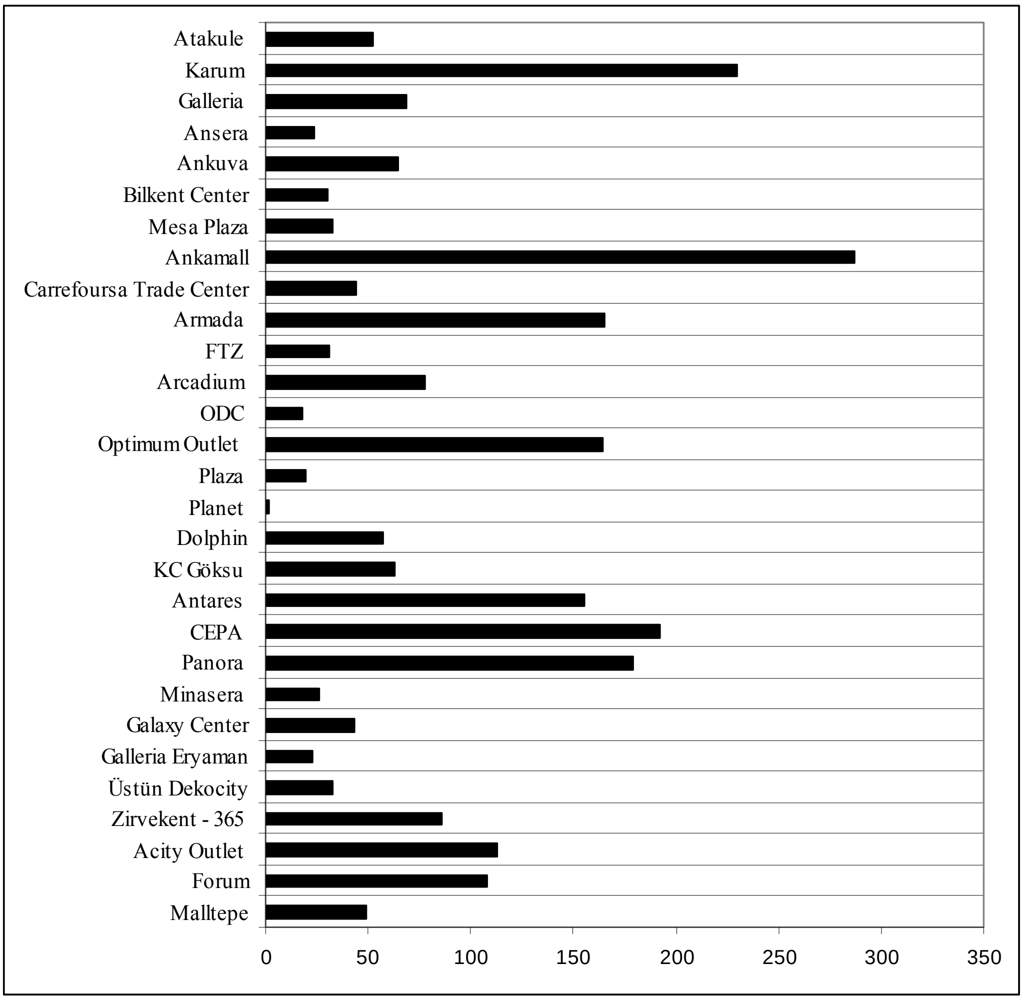


Figure 4.23. Existing Number of Units of the Shopping Centers in 2008 (ordered according to the year of opening date)

The Millennium Outlet Park which was established 3 years ago with a 10 million dollars of investment has turned into a dead mall in December 2008 and it has been planned that it should be rented to bigbox in 2009. The reasons for this is discussed by different actors.

- According to Birol Aktan who is an investor of Millennium Outlet Park the abundancy of shopping malls in Ankara and economic crisis.
- According to the owners of a leading brand in Turkey who do not want to declare their names because of its dysfunctional architecture based on the conversion of the structure from an automobile retailer and bad management.

- Besides the Acity Outlet opened 1 km away from it in the past months. Not only the customers chose Acity but also many brands have moved their stores to Acity from Millenium (http://www.ekoyol.com).

In Ankara there are three more shopping centers who are dead mall candidates. Among these in Planet shopping mall which was opened in 2006, in the district of Etimesgut, in Elvankent bank buildings with a capacity of 140 stores, only has 2 stores active in it. The most important reason for this failure of Planet shopping mall is stated as Emlak GYO thus TOKİ having the property of most of the stores and the bad management of TOKİ (http://www.baskent.in/haber!planet%E2%80%99in-gelecegi-mechul!310941.html). The future of Planet shopping mall is unknown. The other two potential dead malls Atakule and Ankuva are still active. On 11 November 2008 the stores were closed for two hours in Atakule in order to protest the high rents and the management of the shopping mall was accused. In Ankuva while the restaurants persist, other stores are closing and new tenants cannot be found.

As it is known the main criterion in the classification of shopping malls is their GLAs, and not the number of stores dit contains. However, the higher the number of stores gives a clue as to the location in the city and its environment. A higher number of stores may be seen in shopping malls near the city center where land prices are high. As we move to the periphery the number of stores fall while their GLA increases. Outlets should be kept out of this classification.

The translation of firm rationalities into spatial terms: *accessibility* means to locate on the main transportation arteries, *cheap and available site* means vacant or publicy-owned or contaminated urban areas, *closeness to market* means high population density, and *closeness to high purchasing power* means upper income groups. Under these circumstances when the population distribution among the districts are considered, it is expected that Keçiören should have the highest number of shopping centers. However, Çankaya accommodates the highest number of shopping centers because of the location of upper income housing areas.

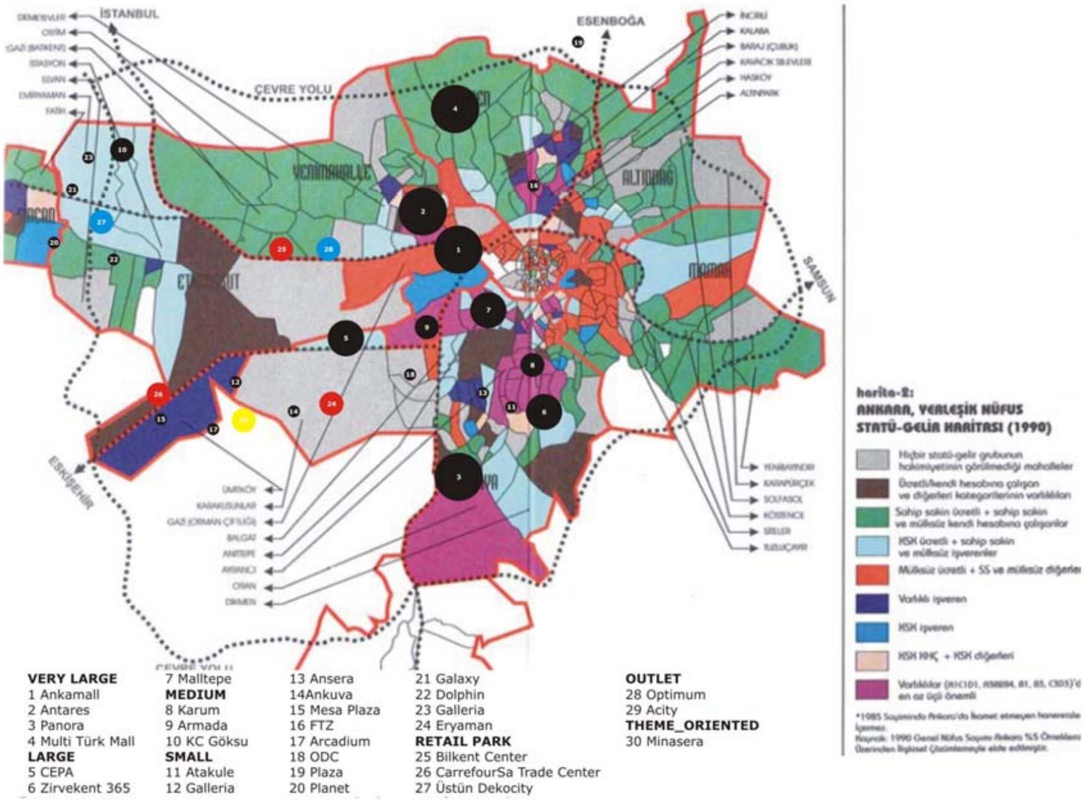


Figure 4.24. Shopping Centerstock and Social Structure of Ankara

(Source: Map of Socio-economic sturucture is obtained from Güvenç, 2001, shopping centers are obtained from field study)

Currently Ankara has nine shopping centers under construction and four in the project stage. The constructions of a very large shopping center, large shopping center, a retail park and a theme-oriented center are continuing along the Eskişehir highway. Others are in Batıkent and Çankaya. The rest are the constructions that will be the extensions of the existing shopping centers, Armada-2 and Carrefour Trade Center-2.

Table 4.11. Shopping Center Pipeline in Ankara

Format	Type of Scheme	Name	Expected opening date
Traditional	**Very Large**	Kentpark Gordion	2009 2009
	Medium	Sosyetik Armada-2 Atlantis Alışveriş Merkezi	2009 2010 2009
	Small	Aymet-Çankaya	2009
Specialized	**Retail Park**	ANSE CarrefourSa Trade Center-2	2009 2009
	Theme- Oriented Center	Arena	2009

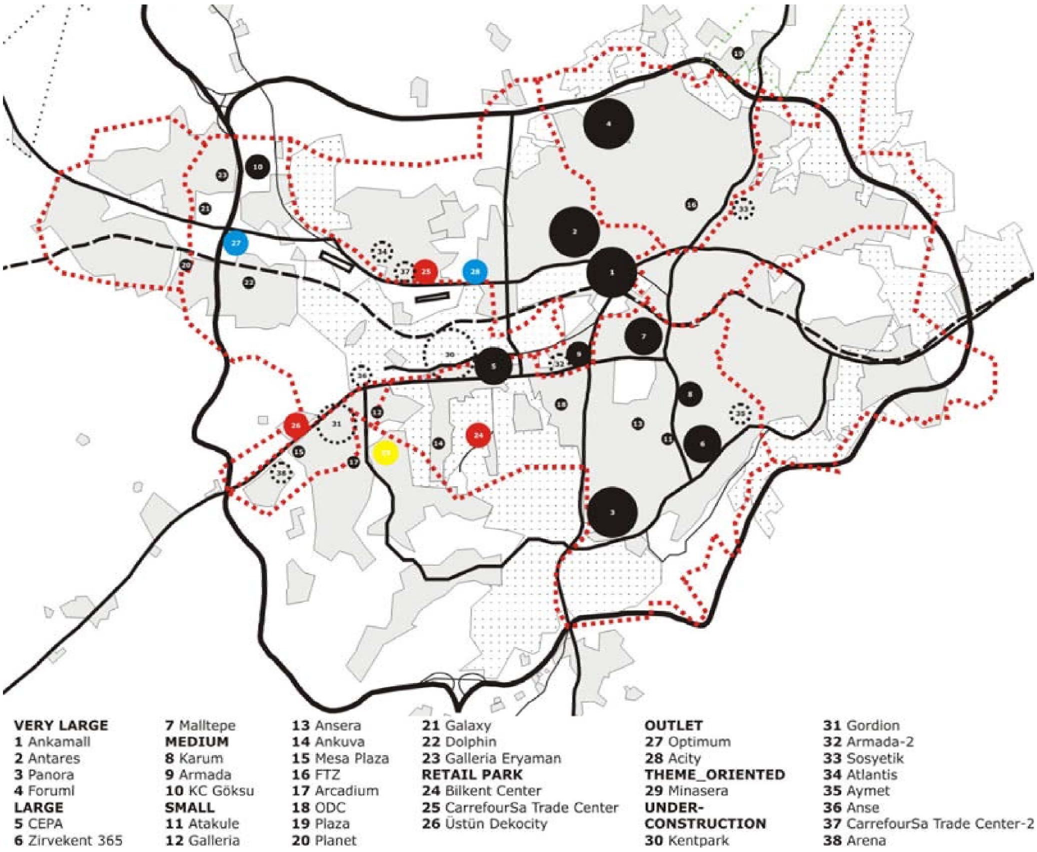


Figure 4.25. Shopping Centerstock and Pipeline in Ankara

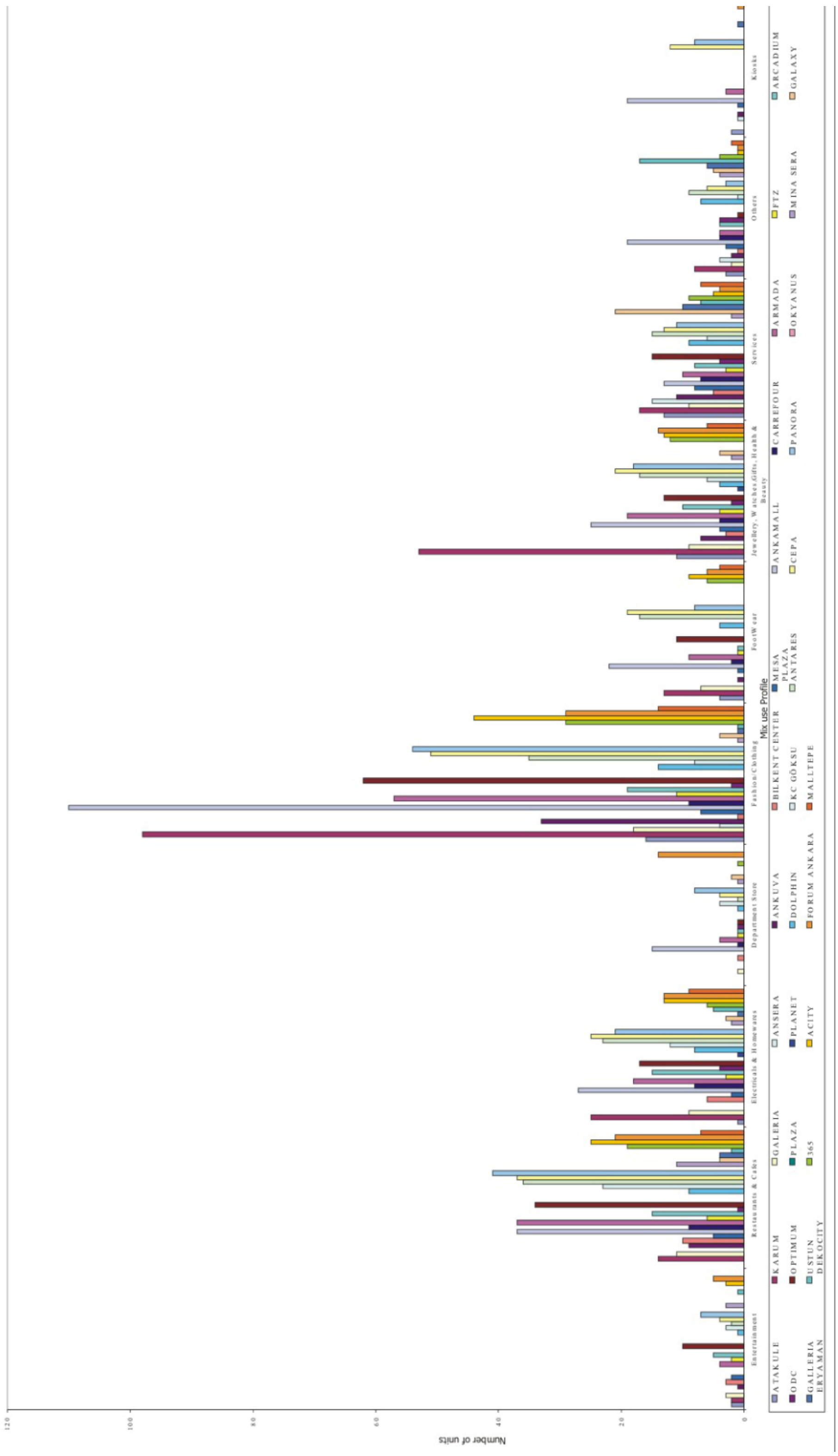


Figure 4.26. Mix-Use Distribution among the Shopping Malls

4.6. Evaluation

When the retail market of Turkey is compared to those of European Countries based on European average, it can be suggested that the market is still not saturated. This fact stated based on the numerical analysis of GLA per capita ratios is very low when compared to European averages. And this is true even for Ankara with the highest ratio. According to the investors making their decisions based on scientific data, Turkey is a big market in terms of retail. Eventually this causes the rapid increase of shopping malls everyday and their marketing to the foreign investors. This way alternatives to the city center increase.

The urban form that this situation createsd are drawn in the below caricature. It is the beginning of the turn of a city into eclectic utilities. Besides these utilities serve independent housing areas and urbanites who do not interact or even who do not meet at all. A city living without a necessity to its center is formed. This is because every possible necessity is satisfied in spaces that are brought to the customers.

According to the survey conducted by 400 respondents by Korkmaz Tirkeş (2007) in 2004-2005 in Çayyolu and Keçiören "going to shopping malls is a very popular activity in both different socio-cultural districts of Ankara places with 71% of the population going once a week or more in Ümitköy and 55% in Keçiören. Ulus, Tunalı Hilmi and Bahçelievler are not mainly visited for necessity by Çayyolu residents. Whereas almost none of Kızılay, Ulus, Tunalı Hilmi and Bahçelievler are visited on a necessity basis by Keçiören residents.

For shopping malls of different sizes the accessibility and location choice criteria are different. The difference of GLA is directly related to the population they serve. The more GLA they have the bigger population they serve. This causes them to choose the nodes where accesibility is the highest. However, this accessibility is not the one suggested by old theories based on the positions of the center, but being on the main transportation axes, where the highest number of vehicles are observed. Along with that the privatization of public spaces, access to plan modifications and property (like in the cases of Panora, Ankamall) is preferred to transportational accessibility.

Figure 4.27. Comics about the new urban living style in newspapers (Source: Cumhuriyet, 2008 (*New Style of Life*)

Although the overall outlook suggests that the distribution of shopping malls is directed to the central regions, they are generally located on the extensions of the center, thus weakening the strength of the urban center. Especially the choice of very large shopping malls in this direction is to create an alternative to the urban center and attract customers from there.

Small shopping centers act as local centers needed for the neighborhoods. First htye serve regionally, then when they lose their competitive power (like Karum) they restructure according to the requirements of the neighborhood. These develop due to the loss of center in Ankara.

According to the research that Korkmaz Tirkeş (2007) has conducted on two different socio-cultural groups in different districts, visiting shopping malls is the favourite activity for both groups. However, the shopping malls preferred by the two groups differentiate:

> "For the people in Çayyolu, three places are popular which are all along the Eskişehir axis; **Armada**, **Bilkent Center** [when the survey was implemented CEPA was under construction. If it was active it would probably be preferred instead of Armada] and the ones in Çayyolu like **Arcadium** and **Galleria**. For Keçiören residents the **FTZ** Migros shopping mall across the municipality building is the most popular one near their homes. Apart from that they use the **Ankamall** to a certain extent" (Korkmaz Tirkeş, 2007).

Today there are many useless “dead malls” in Turkey and Ankara. These shopping malls are either transformed into other utilities or some thematic alternatives are produced. For example outlets (which are popular utilities in the time of crisis) or entertainment parks.

Figure 4.28. Comics about too many shopping centers in Turkey in newspapers

(Source: Cumhuriyet, 2008)

It is a common opinion that competition increases quality. However, the urban centers which are public, democratic, free and where social variety is important on one side, and the private public shopping malls which are planned according to the benefits of the investors on the other, consciously interfere to the urban centers as competitors is not meaningful. Here, the crucial thing is the difficulties and choices of the retail units which have separated from the center and the people who are using these units. This process is tested based on Armada shopping mall in the next section.

CHAPTER 5

THE SURVEY ON ARMADA SHOPPING CENTER

In this chapter, the fragmentation process in Ankara city center through a field survey study based on Armada Shopping Center. In this framework, the customer survey carried on by the Armada Management in 2003, the findings of the polls realized with the stores in Armada in 2003 and 2008, and the interpretation of the interview realized with Armada Management in 2008 will be comparatively used in the scrutiny. This will provide the evaluation of Armada with the point of view of the manager, owner, tenant and the user and will show their conscious, coincidental, direct or indirect effects on the fragmentation process of the city center.

The choice of Armada as the object of our study was supported by Armada's being the biggest shopping center in Ankara at 2003, when the study was started. The total number of the shopping centers in Ankara then was (only) nine and Armada was the only one situated on the Eskişehir Road and it was, with its gross lettable area, on the top of the list. In 2008, when the second part of the study was realized, Armada was the 11th on the list with respect to the GLA and there were 29 shopping centers in Ankara three of which were situated on the Eskişehir Road and four shopping centers on the pipeline. The transformation that the shopping centers of Ankara had and their actual situation could only be understood with the analysis of both periods.

The first survey was conducted in July 2003 and November 2008 with a questionnaire of tenant retailer respondents at Armada Shopping Center. It took five weekdays and weekend days to run the questionnaires. A respond to the 122 questionnaires out of 143 in 2003; and 100 out of 163 in 2008, (which were run at the site) were obtained. The decrease in the number of the respondents can be explained by the difficulty of the retailing units to employ qualified staff for the increasing number of the branches with the fast increase in the number of shopping centers. The number of the personnel capable enough to answer the questions was significantly lower in the second period.

The questionnaire was designed to yield following information:

1. Physical variations in the stores
2. Spatial configurations of the shopping center
3. Retail-tenant mix
4. Consumption tendencies
5. Tendency of the store staff
6. Monthly sales

Besides, two different interviews were realized with Armada General Director Yıldır Erten and executive administration staff Ebru Korkmaz. The interview questioned:

1. The development and management strategies
2. The determination of mix-use profile
3. The selection of the tenants

In addition to the researches made for the thesis, Armada Management provided us with the survey realized in 2003 with 1000 customers. The results of this survey provide a useful and critical framework for showing the customer profiles and the reasons of their preference for Armada Shopping Center.

5.1. Armada Shopping and Office Center

ARMADA Shopping and Office Center, constructed by Söğütözü Construction and Management Company was opened on 28 September, 2002, on the Eskişehir Road in the Söğütözü District. In 1997, local private entrepreneurs came together to establish 'Söğütözü Construction and Management Corporation' as the 'private sector power union' to develop alternative modes of investment patterns and to establish commercial facilities to grasp the urban interest (Barbaros, 2005). Armada, established by the capital stock, was at first designed to be a covered shopping arcade (Korkmaz, 2008), but later was developed as a "city-within the city" (www.armadasite.com). The investors in the union were local private entrepreneurs from Rüzgarlı and Çıkrıkçılar Streets in the traditional city center (Ulus). They also contributed to, and participatate important activities for the Chambers of Commerce and Unions (Barbaros, 2005).

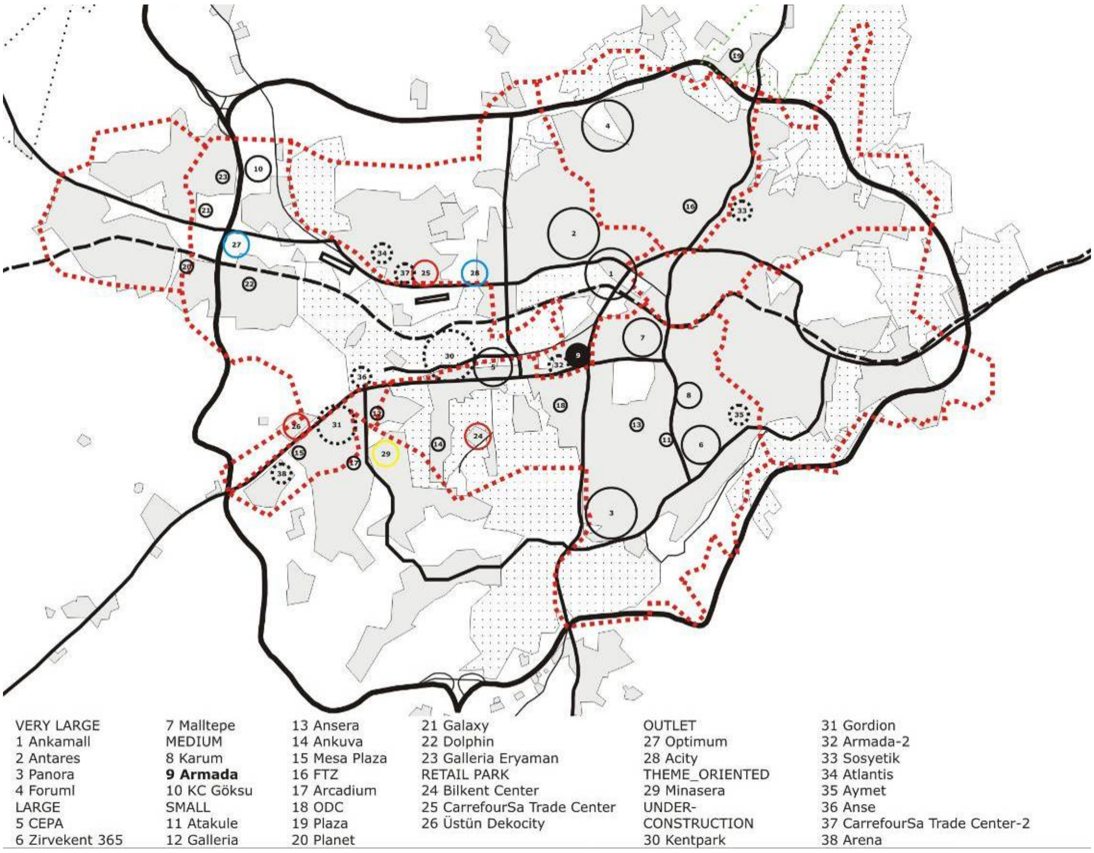


Figure 5.1. Armada Shopping Center and the Other Shopping Center Stock and Pipeline in Ankara

The Armada Group, which consisted of 32 associates when it was first established, is now made up of 36 associates and administrated by 8 board members (Korkmaz, 2008). The Group, which is managed by 1 general director and 15 executives, has 12 technical personnel and 71 cleaning staff employees. The security is provided by a subcontractor operating with 73 security personnel. Since its opening in 2002 the general manager changed once. Yıldır Erten, who was the second and last general manager in 2002, graduated from Ankara University German Language Program and has a Master Degree in Marketing. He's been working in the retail sector since 1981 and involved in shopping centers since 2002. The Armada Management Group also receives remarkable support from Alkaş Consultancy Company. Alkaş Consultancy Company, which was launched in 1997, provides Armada with services from draft projects, to leasing and management consultancy services.

Figure 5.2. Armada Shopping Center and the Office Block

(Source: TAI (Turkish Aerospace Industries Inc.) archives, 2008)

Armada was built up on a parcel of 30,000m^2 with a total construction area of 125,000m^2. It consists of two main structures: a shopping center of three floors and an office block of twenty floors. The shopping center, which is made up of 165 stores of varying sizes, from 45m^2 to 2,000m^2, and a movie complex with 11 picture theaters, has a GLA of about 32,000 m^2. The office block, which covers a total area of 25,000m^2, consists of 3 large office spaces of 1000m^2 with a mezzanine and 23 office spaces with varying sizes from 311m^2 to 361m^2 (Korkmaz, 2008).

The total construction cost of Armada was about \$65,000,000. The experts' evaluation with respect to the varied prices of rents per square meter within 8 to 12 years reveals that the present value of Armada is about \$125,000,000 (Korkmaz, 2008) while the selling price is \$450,000,000. The Armada Management, on the other hand, states that the actual selling price is \$350,000,000 and explains the calculation method as follows:

> When doing the real-estate property calculations, the annual income is multiplied by 10. The annuitant buyer also values the rent of 7-8 years. Therefore, the annual rent of Armada is approximately \$35,000,000. The value of Armada could not be less than 350 million dollar with the earnings of ten years (Erten, 2008).

Figure 5.3. Armada

In Armada, the average rental value of a square meter varies between \$30 and \$100. The unit price decreases as the total floor area increases. The rental values vary depending on the sectors profit margin. Although the small stores cost about \$3,000, the middle ones cost $7,000 and the small gastronomic firms about $5,000 and the big ones $10,000, there is no standard cost of rent per square meter. The common cost is about $13 per square meter. The common cost participation share of the fast-food groups is 50 % higher than the textile companies as the former uses the common space more densely.

There is no article in the contract which obliges one to inform his/her abandonment of the Armada Center before a predetermined period of time. If the circumstances are not suitable, the tenant is not allowed to quit and he/she is expected to pay the rent. The abundance of applicantswaiting, however, usually prevents the rise of a conflict.

Between 2004 and 2006, there were a good number of foreign investors who wanted to invest in the Armada Center. A German Firm, which was investigated by Deloitte[8], was very close to purchasing the Shopping Center but the Armada Group cancelled the sale at the last moment as they had already decided to expand it (Korkmaz, 2008). When the demand for buying and renting Armada is so high, Söğütözü A.Ş does not prefer to earn at once, and aims at securing the gainings with the rents and the additional building. Being the first middle-scale shopping center in Ankara, the gain and the market share of Armada was so high that a number of its associates took place in the establishment process of Panora and KentPark Shopping Centers (Korkmaz, 2008). This reveals that the market of shopping center in Ankara was monopolized by certain groups. While the mistakes made in one shopping center was not repeated in the second one, the success of was taken to each of the shopping centers. Hence, each new shopping center was more succefsul than the previous ones in attracting more brands and more customers.

Armada, which does not provide any transportian services for its personnel, provides the clients with private shuttle bus services operating on four different routes. The serviced areas, which are said to be determined by the management with respect to the target client, covers Konutkent - Çayyolu - Ümitköy, Bahçelievler - Emek, Çankaya - Yıldız - Oran and GOP - Kavaklıdere. Taking into account the demand of the Çiğdem District residents, a number of Bahçelievler services were shifted to this area, but were subsequently stopped due to its inefficient operation. Accessibility, as often analyzed in urban theory, is a sine qua non for consistent operation of the shopping centers. Although the majority of the customers come by their private cars and that the

[8] Deloite Touche Tohmatsu is an international company providing accounting, audit, tax, consulting and financial advisory services.

administrations of shopping centers develop transport strategies based on the private car ownership, they also provide transport services for the potential customer districts, notably to the high income groups' quarters. The researches support this fact. Although the administration seems to put these buses in service as costless services, the customer is obliged to prove his/her expenditure in Armada through a receipt in order to benefit from the transport service. Consequently, through the exclusion of the visitors which does not have any financial contribution to the center from this sort of services, they provoke the visitors to spend money during their visit to Armada.

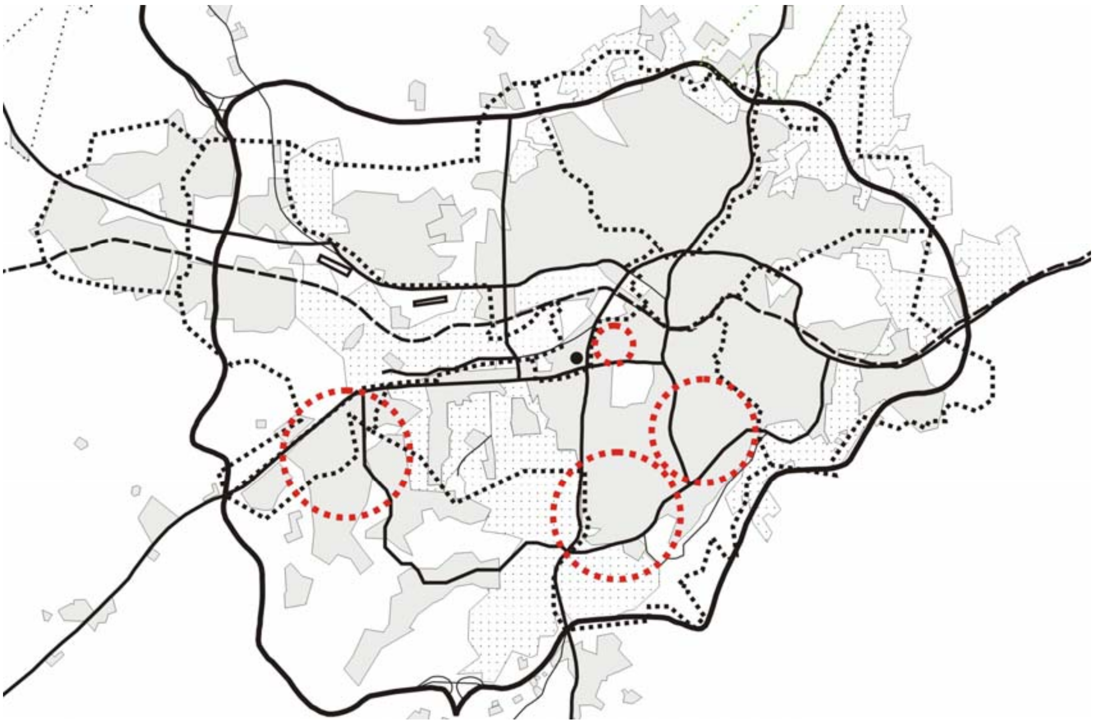


Figure 5.4. Armada Transport Service 2008

According to research findings in 2003 however, that only 4% of their clients profit from the Armada transport services, and that 67% of the customers come in their private cars. Situated along one of the main arteries of Ankara, 25 % of the clients prefer bus or minibus services owing to the abundance of public transport available in this area. 4% of the clients prefer to walk from the offices situated within walking distance.

Figure 5.5. Armada Parking Areas

Although the majority of Armada's visitor come by their private car, and that the target client group has a higher rate of private car ownership, the parking capacity of Armada is not adequate for the number of private car owners. In addition to the deficiency, the total parking capacity of Armada was decreased from 3,200 to 2,700 between 2003 and 2008. The capacity of closed parking area was diminished from 2,200 to 1,503 to create extra space for rental pruposes.

5.2. Armada and Environs:

When Armada was first opened, it was neighbored and closely surrounded by Ankara Intercity Bus Terminal (AŞTİ), Ankara Light Rail Terminal, Türk Metal-İş Labor Union Headquarters, private bus terminals of Varan and Ulusoy, Ford-Otosan Automobile Services, Renault-Mais Automobile Service, OYAK Construction Headquarters, Kozlar Business Center, Laila Bar and Restaurant, Söğütözü Park, ATO, Bayındır and Traffic Hospitals and Yimpaş Bigbox. However, there have been serious transformations in its neighboring area since the day it was launched: Mesa Hospital was constructed in 2004, Spormed Plaza in 2006; Ufuk Hospital in 2006 (the building of the old Traffic Hospital), AKP Headquarter in 2007; Vatan Computer in 2007 (the building of the old Yimpaş), and the Başyazıcıoğlu Mosque in 2007. Besides, there are a number of projects like

ATO Cultural and Convention Center, the Ankara Metropolitan Municipality Cultural and Convention Center, metro station, a four-star hotel in the place of Varan Bus Station, and a separate five-star hotel nearly.

Figure 5.6. Environmental Land Use in 2003

The shopping centers, which are established on cheap land, bring about a transformation process around themselves through the synergy they create. The CBD in the urban theory is now being replaced with the shopping centers which generate a power of attraction by displaying an agglomeration effect. Today, Armada Shopping Center is a identical example with the transformation process that it triggered in Söğütözü District, which is defined by Ankara 2023 Plan as the new CBD. The shopping centers make their location choices with respect to the tenets of the urban theorems. The classical urban theories which are valid in the cases where the ownership is not an asssumption are applicable for the shopping center location decisions. Initially, it was the decisions of the 1990 Master Plan which introduced the decentralization along the western axis and the sub-center formation in the Söğütözü District. Armada Shopping Center enforced these developments and accelerated the transformation process. However, we have to think about the idea of the sub-center proposed by 1990 Master Plan and the actual developments shaped around Armada. Did the 1990 Plan propose a concentration generated by a shopping mall or did it plan a sub-center made up of a network of live and colorful streets with a diversity of public spaces? Shopping centers not only result in the fragmentation of the city center but also affect the formations of the sub-centers.

Figure 5.7. Environmental Land Use in 2008

5.3. Mix Use Profile and Store Variations:

There were changes not only around the Armada Center but they were also within the main body. Although the shop/client profile and the mixed-use balance were not altered in a significant way, the total number of stores rose from 143 to 163 including six new kiosks. Also, an entertainment center for kids was constructed.

When the mixed-use profile of Armada is considered, the entertainment sector has the lowest ratio, fashion/ clothing and gastronomic activities, on the other hand, dominant sectors of Armada.

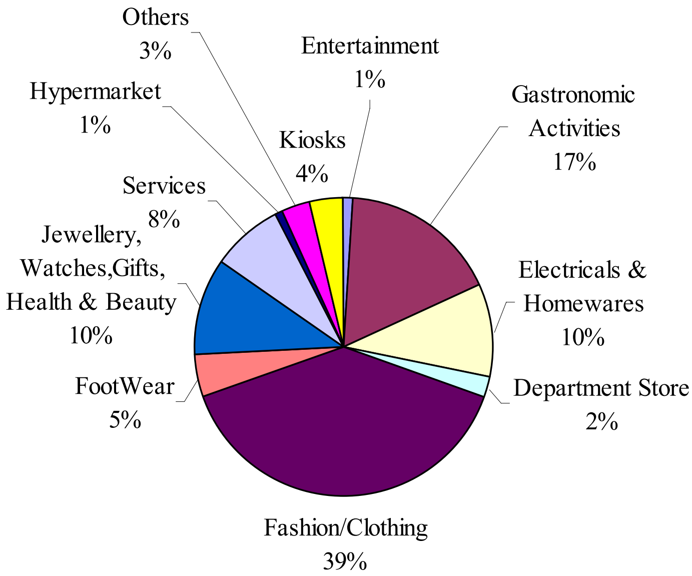


Figure 5.8. Mixed-Use Profile of Armada in 2008

Research findings in 2003 about clients' purposes for visiting the center reveals that 32% of visitors come for shopping activities, 19% for gastronomic services, 16% for the movie complex, 13% for a walkabout (activity), 9% to shop in the hypermarket, 7% to meet with friends and the remaining 2% for other reasons.

In 2008 there are 4 department stores, 1 hypermarket, 1 specialized hypermarket, 8 footwear, 50 fashion and clothing stores, 7 kids clothing, 6 sport equipment stores, jewellery stores, individual accessories stores, house wares stores, electrical stores, optical stores, 1 dry center, cell phone shop, 1 photography shop, watch shop, 1 tobacco shop, perfume store, 1 bookstore, 1 hair saloon, 1 bank, 1 pharmacy, 28 gastronomic units and a movie complex with a seating capacity of 1.500 in 11 halls (for a detailed account, see the appendix). Although there was not a significant change in the mix use profile of Armada, the growth of the service sector, the formation of the kiosks and the doubling of the entertainment facilities are notable changes that occurred since the inception of Armada.

Table 5.1 Number of Stores according to the mix use profile of Armada in 2003 and 2008

ARMADA 2003	2003	2008
Entertainment	1	2
Restaurants & Cafes	23	28
Sports	7	6
Electrical & Homewares	17	16
Department Store	5	5
Fashion/Clothing	49	50
Footwear	8	8
Jewellery, Watches, Gifts, Health & Beauty	13	17
Kids Clothing	8	7
Services	7	13
Others	5	5
Kiosks	-	6
TOTAL	**143**	**163**

Vakko[9] is the biggest among all department stores and is the only branch in Ankara. Beymen used to be one of the biggest among the department stores and used to be the only branch like Vakko. But in 2005 it moved its biggest branch to its own building on Tunalı Hilmi near the Karum Shopping Center and minimized its branch in Armada. The other department stores are Boyner[10] and Marks & Spencer. The hypermarket in the center is Carrefour and a specialized hypermarket for stationary goods is Office Superstore.

In 2003, 36 stores in Armada were closed and 52 new stores were launched later on (for a detailed account, see the appendix). The newly opened stores are greater in number than the closed ones due to the diminishing floor area per shop, the newly added kiosks and the creation of further rentable spaces, such as parking floor and common spaces.

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[9] Vakko and Beymen are two of the most prestigious department stores of Turkey.

[10] Upuntil the year 2004 Boyner was called Çarşı.

Figure 5.9. A view from the kiosks: Starbucks, Ada Tailoring, Aqua Pressing

5.4. Tenant Selection

Armada shopping center, like every successfully managed shopping center, internalize externalities through its leasing arrangements, and the process reveals itself through rent discrimination and center space allocation, to make the further manifestation of the process discoverable, including spatial evidence. It aims of preserve the mixed-use balance and therefore maintaining the client profile; being able to abandon the stores which are not advantageous for the Center; and thus re-evaluating theşr alternative uses.

Alonso's (1964) original model of firm location considered both business volume and transportation costs in determining location criteria relative to the city center. Here business volume is a function of customer traffic density, and there are no transportation costs. Stores can increase sales depending on their quantity of goods sold per purchasing customer visit, price per unit of good sold and proportion of customer traffic per unit store area that purchases. Even if a company demands to install here, it is the management to take the decision to pick the most profitable firm.

The first tenants were selected by Söğütözü A.Ş. and Alkaş Consultancy Company with respect to the mix-use distribution principle to match with the pre-determined client profile. Following the completion of the architectural draft project of the Center, there were interviews with the selected tenants in order to discuss their demands. Then the tenants were considered with respect to their spatial needs and the necessary revisions were made. In this respect, the determination of the tenants and the signing of pre-contracts before the construction process minimized the vacancy risk for the investor.

Today, there is a different process for the brands wishing to install in Armada. Despite the unavailability of vacant stores, the demanding clients are asked to fill in a tenant information form (see the appendix) in order to be kept in the archives. When there is an available shop, these demands are evaluated so as to pick the one which will be the most useful for the Center and the suitable firms are called for an interview. If there is an agreement about the location, a leasing contract is made either through the consultancy firm or directly between the Administration and the firm. The big firms, however, are not submitted to the same process; they postulate their spatial requirements directly through the executive committee of the Armada Group or the consultancy firm.

The duration of leasing contracts is 10 years for big companies, and 5 for all other ones. The decisions concerning the means to pay the rent (whether by a fixed rent or by endorsement) and the valid ratio for the endorsement during the contracting period is taken by the investor and the administration. This situation clearly reveals the segregation among different capital groups. While the contracts with the small-scale and unreliable firms are limited to five years, big companies are tried to be attached to the shopping center with long term contracts.

The actual number of stores which are endorsed is 41, which makes up 49% (in terms of square meters) of Armada. These firms are responsible for declaring their endorsement by the 10th of each month.The administration collects and controls the invoices to eliminate the chance/risk of undervaluing the endorsement. The endorsed firm is charged 5000 dollar as the monthly fixed minimum rent. They then have to pay the administration each month the difference between the 10% of their monthly gains from the endorsement and the fixed rent price. Tenancy agreement over endorsement is reasonable for both the administration and the tenant. Since the administration could follow the stability of the revenues, this system offers an opportunity for the reevaluation of the conditions by both sides in the case of a decline in the endorsements. Furthermore, as the rent (proportionally) decreases in the periods when the sales are low or in the case of economic instabilities, this system is preferable for the tenants. Today, this is the current trend in the world to ensure the continuity of the shopping centers. Consequently the shopping centers internalize the externalities. In Turkey, however, the (excessive) rise in the rents, notably in the dollar-based ones, may result in the closing of the stores or the changing of the renters as it is the case in Ankuva.

General Manager Yıldır Erten states that for a company to be installed in the Armada Center, they are expected to be a “brandname” and that their “popularity/brand awareness” must be proven. A power of attraction is strongly required for the Center, and the management aims at making the most suitable composition of known brands in order to create a synergic power. Under these conditions, the competition brought by the free market is interfered. The powerful and popular brands, having proved their place in the market, enjoy their success while the weaker ones are eliminated from the start. This increases the monopolizations in the shopping centers and the store concidence among the shopping centers. Furthermore, the firms prefer to coexist with their alikes as it enables the customers to make comparison between the goods of a similar type and quality. This not only brings competition but also give a chance to attract customer.
The traditional retailers or the local stores, today, do not have much power within the shopping centers. Traditional commerce, however, aims at making use of the Center’s existing synergy by (simply) installing in them. Erten claims that, although there is a need for these types of stores in shopping centers and that they could contribute to some client demands, they would not attract extra customers, and would not provide anything extra for the center. That is why the existence of this type of stores is limited to 10%.

Erten, claiming that they should also give importance for the stores which are not well known but working to be, sets a goal of 30% for them. He suggests that enrichment of shopping centers could only be achieved through the enrichment of store diversity. He states, for example, that *Şık Düğme*, a local brand of Ankara, could install be installed in the Center. On the other hand, he affirms that a traditional retailer often creates more problems during the adaptation processes when compared to the “organized retailer”.

5.5. Shopping Center Configuration

The building is rectangular in shape. Parking is provided in the rear, at the sides, or in front. Commonly, most of the area around the center is devoted to parking, other than the multi-level underground parking is provided for customer use

An obvious reason for the rectangular layout is to make fullest use of corners. Another reason for the use of this triangular shape is to minimize the length of a center which would be too long in a straight line.

The hypermarket, Carrefour, is located on the lowest floor, basement that the back door of Armada opens. Accordingly, this floor is separated into service units. Hypermarket, dry cleaning center, pharmacy, an optical store, a photographer, and banks are located on this floor. Besides, some specific stores which require large floor areas such as the toy store, the specialized hypermarket for stationary goods, Office Superstore, and a pet shop, are also situated on this floor. In 2008, there were some changes in the brands of this floor but the usages usually remained same. Five retail kiosks were also added.

The next floor up underground contains stores selling mostly furniture, domestic goods, personal accessorizes and children'sclothing. Bookstores and hairdressers are also located on this floor. Two café-kiosks were added later. The distribution of the usages remained same but the brands have changed.

The ground floor and the first floor are those where many clothing stores and shoe stores are located. Until 2005, Beymen is on the ground floor, and Vakko is on the first floor. They remained as the biggest department stores of Armada. Later, Beymen reduced itself by 50% and the area abandoned by Beymen was rented to another clothing store. Besides changes in brandnames, there were no significant changes in the usages of these two floors.

In addition to the sport equipment stores, a Mark &Spencer (on the west end), and Boyner (on the east end) are located on the seond floor. Uludağ Restaurant, which is also located on this floor, is integrated with the office block unit through an extension to the block. In addition to the changes in the brands on this floor, a second escalator was constructed in 2008 enabling customers to go from Marks and Spencer directly to the food court.

The third floor is the food court. In addition to cafés, restaurants and fast food chains, the lobby of the movie complex is located on this floor. In 2005, a play area was constructed at the point where the center integrates with the office block. Furthermore, the large terrace in the food court was closed in 2008 to create an activity area of 400m^2.

There were contacts made with the administration of various schools in Ankara for the organization of cultural and entertainment activities in this very area. The events like (theater) plays and musical shows are also expected to attract the families of the students.

The upper floor, which is a mezzanine, consists of 11 movie halls and the foyer of the cinemas.

The presence of two anchor stores, each placed at one an end of each floor at the center, is considered optimal so that they will draw customer traffic through the center. The idea being that they draw shopper traffic through the center and past non-anchor tenants. High trafficked areas are reserved for impulse business, for instance fast food restaurants. Areas less trafficked, close to entrances or exits, are reserved for the service tenants, such as the hypermarket, the bank, the travel agency, and dry cleaner, because they are the destination stores.

5.6. The Retail Tenant Mix

Both sales and rent per square foot tend to decrease with store size and store types tend to fit into distinct size ranges. For instance, both jewelry and "candy and nuts" stores had relatively high per square meter sales, but maintained relatively small stores, while both women's apparel and toy stores had relatively low average per square foot sales but occupied larger stores..

The date of establishment of many of the existing stores is isochronal with the inauguration of the Armada Shopping Center, which means they were formed especially for Armada. The Armada Pharmacy is one of them and has a typical pharmacy formation. Tadım Pizza, Ankara Dönercisi and Sunum Gıda are three fast food stores like other similar fast food stores that always coincide with brand new shopping centers. Kanz, Chicco, L’leida Jewellery, Mocassini Shoe Store, W Menswear and Agatha Accessories, are all well- known European trade marks, selling expensive and exclusive products. They did not come to Ankara before because they did not see any potential consumers. But through Armada, they felt they would be catering to upper class clients.

Among the stores of Armada, Remzi Bookstore is the oldest one with the establishment date of 1923 and the store in Armada is its only agency in Ankara. İpekyol, under the name of Ekol Ready-to-wear Clothing Firm, was established in 1933. Paşabahçe was established in 1936, Hacıbaba in 1949 and Faik Sönmez in 1951.

When the launching dates of the stores of Armada are viewed, 2003, 2004, 2005, 2007 and 2008 then appear to be, respectively, the years when the numbers of firms established were dense. Then increase in the number of shopping centers and the consequent augmentation of international brands in the Turkish market, as well as the establishment of new national brands specializing mostly in the food and service sector, contributed to this aggregation of the years.

All of the firms located in the Center are members of either the Ankara Chamber of Commerce (ATO) or the İstanbul Chamber of Commerce (İTO). Six of them are registered with the Ankara Chamber of Industry and seven of them with the Chamber of Tradesmen and Craftsmen. The firms registered to ITO are Remzi and Teknosa, while those that are registered with ATO are Panço, Lacoste, Nine West, Park Bravo, Hotiç and Çırağan Meat Restaurant.

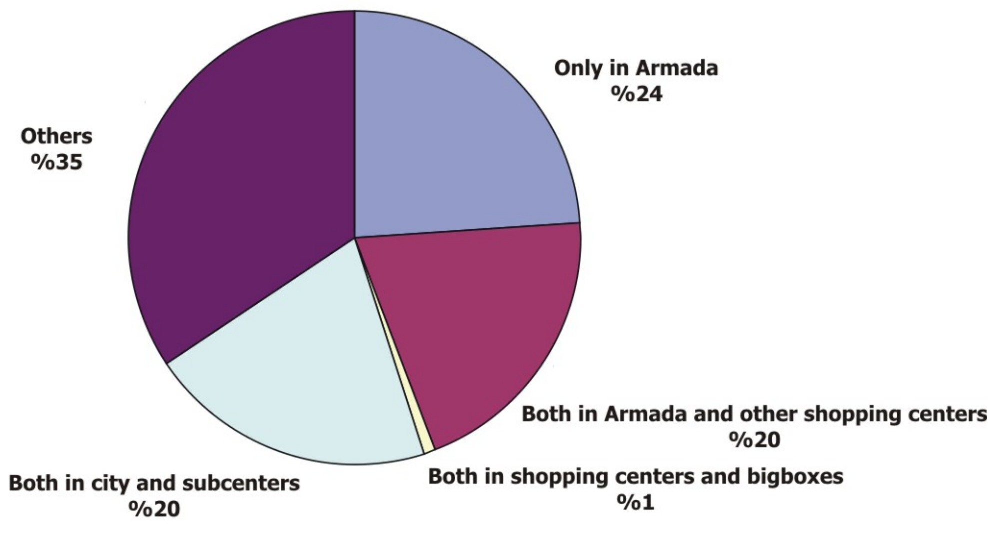

Figure 5.10. The Distribution of Branches in 2003

The data obtained by the stores (through interview) in 2003 reveals the distribution of branches of the stores installed in the Center was as follows: 87 of 114 stores, which make up 76% of the total number, have branches in other parts of Ankara, while the other 27 stores don't have any branches in Ankara other than those in Armada. Two of these stores were Vakko and Beymen. The others were Mocasini, Silk & Cashmere, Gianfranco Ferre, Gas, Joop', Miss Sixty/Energie, Nautica, Puma, Sport & Sport, Diamond, Agatha and Uzelli. Note that these stores serve mostly high income groups.

In 2003, 32% of the stores had branches in Kızılay, 29% in Migros Shopping Center, 22% in Tunalı, 11% in Çayyolu and 10% in Bilkent Plaza. 45% of all the stores had branches in a shopping Center in Ankara, i.e. Migros, Carrefour, and Bilkent. 61% of them had branches in the city center, i.e. Kızılay, Tunalı, Ulus, and Kavaklıdere. The stores which mostly address to high income groups, such as Tommy Hillfiger, Lacoste, Nike, Gift Home, Esse and Harem, were located only in the three biggest shopping centers of Ankara.

Beymen and Vakko, as two of the biggest department stores of Turkey, were formerly located in the city center and moved to Armada in condition that they close their central departments. Consequently, they moved to Armada to operate for free the first year, and then they were expected to pay, not a fixed rent, but to pay over their endorsement[11]. This was an administrative intervention which was not achieved on its own but realized through a deliberate and operational urban administration strategy. The management of Armada, refusing this claim stated that the persuasion process was realized by the mediator consultancy company. This shows us that the fragmentation process is not a process that works automatically but as the ways that the investors search to shape the urban space with respect to their target gains.

However, there are allegations that Beymen was, when it first moved to Armada, not content with the client profile in the Center as they found the number of buyers quite low and that they regretted their move. Vakko, which was discouraged by the complaint of Beymen, but finally moved into Armada in any case, and presently serves/functions merely in this center. Beymen, however, following its diminishment in Armada, opened its largest branch in Ankara in Tunalı, near by the Karum Shopping Center, and later in

[11] Beymen and Vakko staff informed us about this leasing situation in 2003 but not acceded by the Armada Administrion in 2008

2007, and launched another store in Panora, which turned out to be bigger than the one in Armada.

The results of the client polls made in 2003 reveal that the installation of Beymen and Vakko in the Armada Center was an important strategy. The studies show that Beymen is visited by a ratio of 6.13%; Vakko by 5.27% and Gima by 6.13 %. Beymen and Vakko, whose establishment in Armada was a critical development strategy for the administration, are now the two most important anchor stores of Armada. These two brands were so overrated that the façade of Armada was modified specifically for them and both stores were equipped with entrances of their own. Their presence in Armada was, even in the conceptual stage, a significant determinant for many brands to settle in Armada (Korkmaz, 2008).

Another field study in 2008 reviews the distribution of the branches of the stores of Armada. Note that 16 of the total 132 non-gastronomical stores were not taken into the evaluation. Carrefour Hypermarket, being one of them, was profoundly considered in the previous chapter (Chapter 5). ING Bank, serving as a banking branch, was not taken into consideration because it was not give relevant information. Furthermore, Avea, Turkcell, Bosch, Vodafone, Philips, Vestel, Samsung were left out of consideration as they are very broad brand names. Finally, Samsonite, Sisley, Converse, Haribo, W and Jumbo are not taken into account as the information related to them was not available.

The 117 stores considered serve, in overall Ankara, with 451 branches. 25 of these stores (one of them being Vakko) have only one branch in Armada. 34 of them have branches only in shopping centers; 1 only in the outlet; 13 in shopping centers and in outlets; 13 of them in shopping centers, outlets and Bigbox; and 2 of them in the city centers (Dexter in Çayyolu and Minyon Jewelry Store in Kızılay and Tunalı). As a result, 63% of these 117 stores chose a place only in the shopping centers, outlets or big boxes, meaning that one has to visit a *privately owned public space* to shop any of these 74 stores.

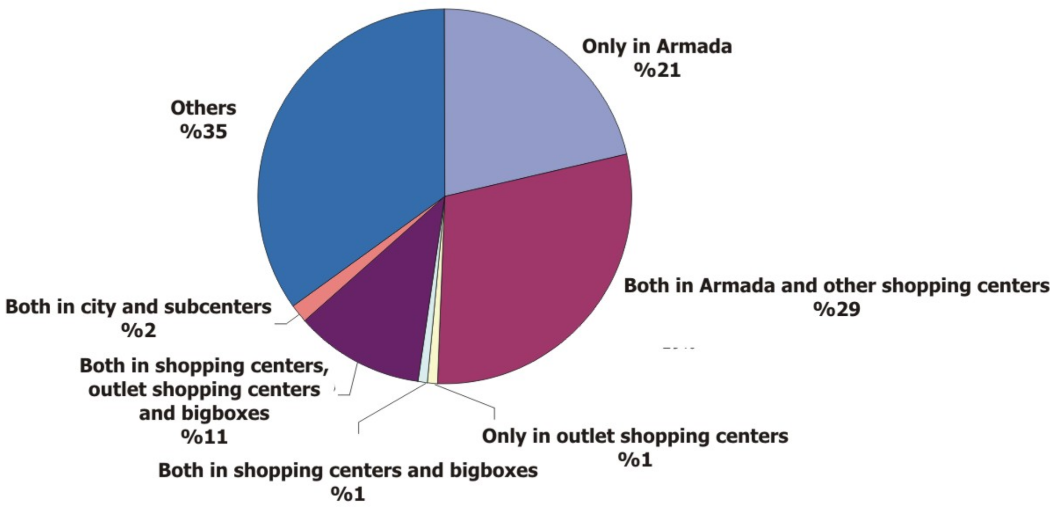

Figure 5.11. The Distribution of Branches in 2008

Only 38 stores have a branch both in shopping centers and in the city centers. There are 23 stores with a branch in Kızılay; 19 in Tunalı; 7 in Gaziosmanpaşa; 5 in Çankaya and in Bahçelievler; 4 in Ulus, Çayyolu and Etlik; 3 in Balgat and Yıldız; 2 in Cebeci and in Sincan. The districts where there is only one branch of the stores in Armada are Yeni Mahalle, Altındağ, Kavaklıdere, Oran, Emek, Demetevler and Sıhhiye.

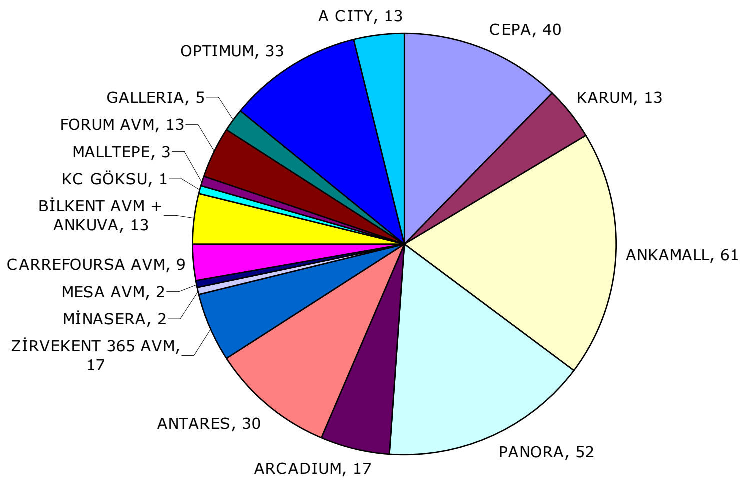

Figure 5.12. Branch Intersection between Shopping Centers

The 52 % of the stores of Armada that are taken into account serve also in Ankamall; 44 % of them in Panora; 34 % in Cepa Shopping Center; 26% in Antares; 15 % in Arcadium; 15% in Zirvekent 365; 11% in Bilkent Center-Ankuva; 11% in Karum and 11% in Forum Shopping Center. Besides also one to nine stores have branches in Minasera, Mesa Plaza, CarrefourSA, Galleria, KC Göksu and Malltepe Shopping Center. There are also outlet branches of the stores with 28% in Optimum and 11% in Acity.

None of the stores in Armada has any branch in Atakule, Ansera, FTZ, Plaza, Planet, Dolphin, Okyanus, Galaxy Center, Galleria Eryaman and Üstün Dekocity Shopping Center.

Branches of the stores are seen to locate in almost all of the very large shopping centers, large shopping centers ve medium shopping centers. The differentiation is observed in the small ones. The shopping centers which are not given preference, with the exceptions of Üstün Dekocity, Atakule and Ansera, are those which are located on the north of the city. This means that the stores in Armada address mostly the higher income groups. The reason that they have not chosen to operate in Atakule or Ansera is these they tend to be deadmalls, and not in Üstün Dekocity as that is a decoration retail park.

Erten's (2008) approach, regarding the overlapping ratio of 63% of Armada's stores with the stores in other shopping centers is as follows:

> If you wish to open in shopping centers of 3,000 stores with 300 brands, you will get not 60% but 100% of them overlapping. It is only natural where you have a high rate of demand. The right thing to do is either to increase the brand demand or to evenly expand the shopping center production (Erten, 2008).

Comparing the period when Armada was first launched with the situation in 2008, we observe that the numbers of the branches in the shopping centers have increased, while those in city and district centers have decreased.

The research made in 2003 reveals that the majority of the customers reside in districts like Çayyolu, Çankaya, Bahçelievler, Emek, Balgat, GOP, Söğütözü and Dikmen. When the districts that the clients are coming from and the spatial distribution of the branches are compared, we see a meaningful overlapping.

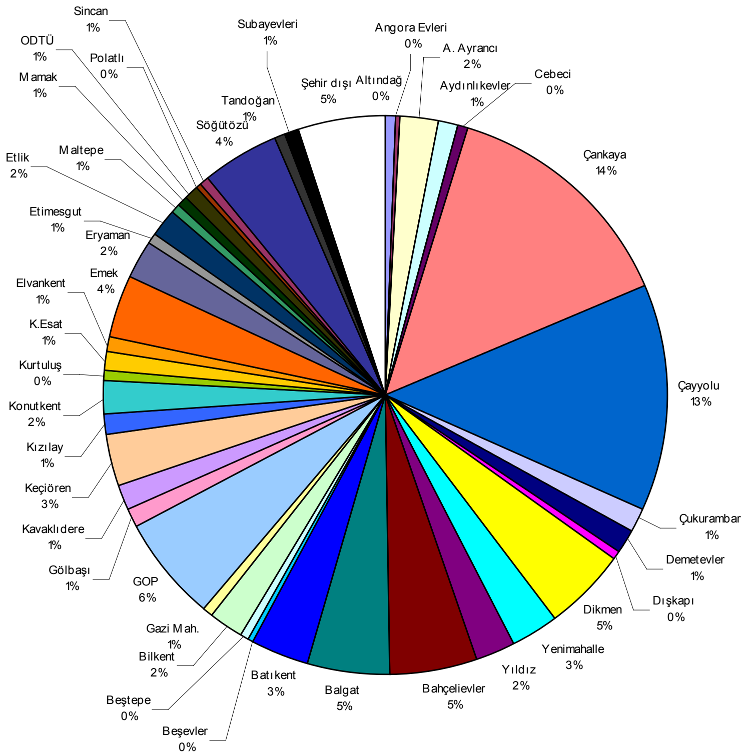

Figure 5.13. The Districts That the Clients Come from to Armada

Keops, Greenwich, Classico, Yuba Tobacco, Budakaltı, Elefanten, Office Superstore, Beymen, Vakko, Benetton and Kekik are the stores that abandoned their previous addresses in order to move to the Armada Shopping Center.

Office Superstore moved from Konya Road to its location in the Armada Center and its former address is still unoccupied. Elefanten, which was previously launched in Yeni Mahalle; Keops, previously in Kızılay; Greenwich previously in Karum shopping Center; Lassico previously on Turan Güneş Boulevard; Benetton formerly on Köroğlu; Kekik, previously in Ankuva; and Yuba Tobacco, previously in Bahçelievler closed their former places to install themselves in Armada when it was inaugurated as a new and big shopping center.

Table 5.2: Stores Moved to Armada from a Previous Location

Which	Activity	where	Ownership	previous address	new activity	Why
Office 1 Superstore	stationary	Konya Yolu 9.km	Tenant	empty	empty	being in a shopping center
Budakaltı	Café	Beymen / Tunalı	Tenant	rented	D&R	Beymen Department Store moved
Elefanten	Kids clothing	Yeni Mahalle	Owner	empty	empty	Armada
Keops Mücevherat	jewellery	Bulvar Pasaj/ Kızılay	Owner	branch	branch	new trends as shopping center
Greenwich	watches	Karum Shopping Center	Tenant	rented	jewellery	Armada
Benetton	clothing	GOP Köroğlu	Tenant	rented	houseware	too many branches, less customer
Vakko	department store	Atatürk Bulvarı/ Kızılay	Tenant	rented	kimlik	problems of Kızılay Opportunities offered by Armada
Classico	clothing	Turan Güneş Bulvarı	Tenant	rented	houseware	Armada
Kekik	Café	Ankuva Shopping Center	Tenant	rented	cafe	contrat ended, Armada better
Beymen	department store	Tunalı Hilmi Caddesi	Tenant	rented	D&R	Opportunities offered by Armada
Yuba Tobacco	Tobacco	3.cad. 29-A Bahçelievler /				Armada

Except from those sited above, Beymen, which was previously launched in Tunalı and Vakko in Kızılay, also moved into Armada after closing their former addresses. Budakaltı Restaurant, which was launched in Beymen-Tunalı, also moved into Armada with Beymen. Beymen, after diminishing its place in Armada in 2005 moved its main agency to new building that was constructed, near the Karum Shopping Center, Sheraton and Hilton Hotels.

Figure 5.14. The building that Beymen abandoned before moving to Armada - presently occupied by D&R bookstore

Figure 5.15. New Beymen Agency in Tunalı

The building that Vakko used before moving to Armada is presently occupied by the *Kimlik* Department Store. Unlike the upper-middle class client profile of Vakko, Kimlik addresses mostly to middle and low-middle income groups[12].

Figure 5.16. Kimlik Department Store - the present occupier of the former Vakko building

When the store profiles of 2008 are observed, we see that Homestore, Keops and Kekik closed down their stores in Armada. Kekik Restaurant went bankrupt while Keops went on to the Karum Shopping Center. Although the management claims that there exists no

[12] When compared the prices of a shirt in Vakko with 200 TL, a trouser 250 TL, Kimlik'te ise 19TL, 19TL respectively.

store that opened new stores in other shopping centers following their closing in Armada, we see that there are seven stores which closed their branches in Armada for certain reasons and opened up new ones in other shopping centers between 2003 and 2008. Homestore and Güreller Prestij launched new branches in Panora Shopping Center; Agatha, Loft/Colins and U.S. Polo in Ankamall; Kanz in Cepa Shopping Center and Ankamall; and Porland in Forum Shopping Center.

The research made in 2003 shows that 42.24% of the stores see Kızılay, Tunalı, GOP or the surroundings of the city center for their future branches. Among these, 17.14% of them focus on the existing shopping centers; 1.9% consider the potential opening of a new shopping center while, 3.81 % of them do not aim at opening a new branch. Findings of 2008 clearly reveal that the stores do not intend to open new branches in Ankara as they already have branches in the newly opened shopping centers. In other words, the Ankara market has already been saturated with these brands. Only Berk and Stefanel consider opening new branches in Bilkent and Hotiç in Tunalı.

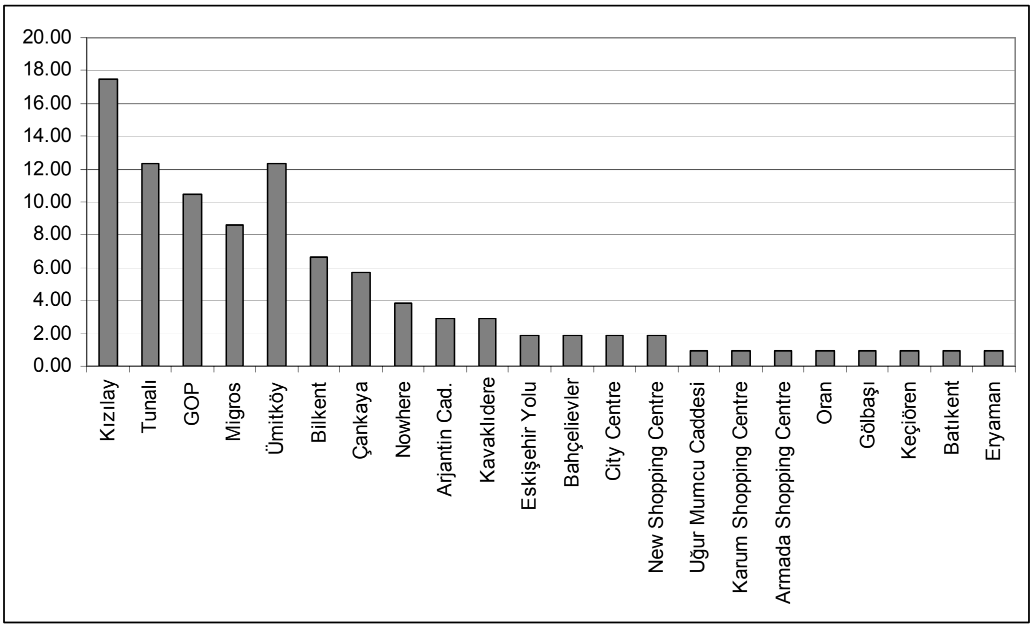

Figure 5.17. Target Places to Install a New Branch - 2003

5.7. The Consumption Tendencies in Armada

Concerning the question about monthly best selling products, we were able to get an answer from 56 stores in 2003 and 27 stores in 2008. The answers reveal that the consumption/spending tendency in Armada favours the life-time products like electronical devices, domestic goods, stroller/baby carriage, porcelain set, teapot, domestic accessories, personal accessories and mobile phone. The monthly numbers of products sold per store are 15 televisions, 35 DVD players, 47 strollers, 23 household appliances, 3 eyeglasses, 4 necklaces, 26 beds, 103 sets of porcelain, 20 carpets, 220 duvet covers. Secondary consumption focuses on the seasonal shopping and it consists of textile products such as suits, t-shirts, perfume, pants, shoes and bags. The figures for seasonal consumption are as follows: 218 men suits, 938 t-shirts, 400 perfumes, 2989 pair of shoes, 600 pair of jeans, 350 bags. Besides, the daily food consumption is at a remarkable level. In 13 of the 22 restaurants, there is food consumption of 1000 to 1500 portions of food monthly. The daily number of tokens sold in the entertainment centers is also at a significant level with an average number of 140.

5.8. Store Staff Tendencies

While the total number of personnel was 956 in 140 stores in 2003, there are 620 workers in 87 stores in 2008. As we could not get an answer about the number of partners, we could not determine the firm sizes.

The research made in 2003 about the distribution of the employees among the stores of Armada showed that 7.85% of the staff work in Vakko; 5.96% in Gima; 5.23% in Uludağ Restaurant; 3.35% in Officiel; 3.14% in the movie complex; 2.62 % in Mcdonalds; 2.62 % in Tadım; 2.09 % in Benetton; 2.09 % in Remzi Bookstore; 1.78 % in Paşabahçe; 1.67% in Koton; 1.78 % in Loco Poco; 1.57% in Kekik; 1.46 % in Burger King; 1.26 % in Nike; 1.26 % in Budakaltı; 1.46 % in Arby's; 1.15% in Network and 1.15% in Polo Garage.

The findings of the research made in 2008 reveals that 9.2% of the personnel work in Carrefour; 5.2 % in the movie complex; 5 % in Adventure; 4 % in Mc Donald's; 3.2% in Burger King; 3.2% in Tadım; 2.7% in Remzi Bookstore; 2.7% in Çırağan Et Lokantası; 2.4 % in Paşabahçe and 2.1 % in Koton.

The districts where the Armada staff often resides varied from Pursaklar to Bilkent, from Cebeci to Dışkapı in 2003. Among the 72 districts whre the Armada personnel reside, Batıkent was highest with a ratio of 12.41%. Keçiören follows Batıkent with a ratio of 12.22%; Sincan with 8.46%, Dikmen with 7.14 %; Etlik with 6.77 %; Yeni Mahalle with 4.7%; Eryaman with 4.51%; Demetevler with 3.76%; Balgat with 3.01%; Aydınlıkevler with 2.26%; Elvankent with 2.26%; Çankaya with 2.07% and Mamak with 2.07%. 2 % of the personnel, which makes 10 or less staff, resided in Çayyolu, Etimesgut, Cebeci, Küçükesat, Abidinpaşa, Hasköy, Bahçelievler, Konutkent, Telsizler, Altındağ, 100. Yıl, Ayrancı, Fatih, İskitler, Kolej, Aktepe, Emek, GOP, Kırkkonaklar, Örnek, Bilkent, Gazi, Hüseyin Gazi, İncirli, Kurtuluş, Oran, Öveçler, Plevne Mah, Söğütözü and Subayevleri. The districts where only one personnel of Armada resides were Akdere, Akköprü, Anıttepe, Basınevleri, Beştepe, Beysukent, Çukurambar, Dışkapı, Eskişehir Yolu, Gülveren, Güneşevler, Hacıkadın, Hoşdere, İstanbul Yolu, Karşıkaya, Kavaklıdere, Kayaş, Kızılay, Kızlarpınarı, Kocatepe, Köroğlu, Maltepe, Meteoroloji, Pursaklar, Seyranbağları, Siteler, Tandoğan, Tuzluçayır, Üçyol and Ulus.

In 2008 among the 48 districts that the Armada staff lives, Sincan heads with a ratio of 15.15%. 12.12 % of the personnel dwell in Keçiören; 7.07 % in Batıkent; 5.81% in Balgat; 5.81% in Etimesgut; 5.56% in Dikmen and 5.30% in Eryaman. Etlik, Çankaya and Mamak follow these with a ratio of 3.79%; Demetevler with 3.28%, and Yeni Mahalle and Abidinpaşa with 3.03%. The districts where 10 or less workers reside are Çayyolu, Bahçelievler, Gölbaşı, Küçükesat, Aydınlıkevler, Elvankent, Cebeci, Altındağ, Emek, Çukurambar, Kayaş, Ayrancı, Öveçler, Söğütözü, Akdere, Anıttepe, Dışkapı, Seyranbağları, Ulus and Yıldız.

The districts where only one employee live are Hasköy, Konutkent, 100. Yıl, Bilkent, Gazi, Kavaklıdere, Pursaklar, Siteler, Tuzluçayır, Bağlum, Çubuk, Doğantepe, Elmadağ, Kurtuluş and Varlık in 2008

Erten (2008) claims that there is a decline in the quality of the Armada staff and he states that:

> Ankara, in the last three years, increased its rentable area from 295,000 m^2 to 800,000 m^2 with the addition of 511,000m^2. The number of stores reached 3,000 rising up from 1,600. As the floor areas of the stores increased, the quantitative increase of the store is not proportional to the raise in the rentable area. Considering an average number of five personnel in each store, the total number

> of the workers makes about 7,500. In such an increasingly growing market, it is, unfortunately, not possible to train educated and well-informed staff.
>
> Because of such a fast construction period brought about a shortage of plasterboard and stainless steel, the store owners see the staff quality as the least important issue, and that contributes to the decrease in the overall quality.
>
> The decline in the quality of workers affects the sales in the short term and the client profile in the long term. We have to add that each product that could not be sold due to an unsuccessful salesman brings about a decrease in the revenue of the shopping center (Erten, 2008).

There are 40 firms which provide their own mass transport services for its staff. However, the data pertaining to the routes of these services or the served districts is not available. These firms are LcWaikiki, Polo Garage, Keops Mücevherat, Nautica, Diesel, L'leida, Berk, Dufy, Roman Hazir Giyim, Damat Tween, Cacharel, Yves Rocher, Nine West, Mocassini, Park Bravo, Altinyildiz Fabrika, Stefanel, Adventure Republic, Işık Kuyumculuk, Greenwich, Agatha, Dexter, Divaresse, Benetton-Sisley, Derimod, Miss Sixty-Energie, Karton, Classico, U.S. Polo, Penti, Ayyildiz, Gas, Tiffany, Adidas, Uludağ Restaurant, Mavi Jeans, Nike, Little Big, Dockers, Levi's, Loft Colins, Tadım Pizza, Burger King, Çırağan Kanatçısı, Arby's, Zerdali Pasta, Piknik, Adana Sofrası, Otantik Kumpir, Döneristan, Hüsrev, Mc Donalds, Ankara Dönercisi, Sunum Gıda, Mado, Express Cafe, İkbal, Armada Movie Complex and Faik Sönmez. These firms serve/function in different sectors and the number of their workers vary from 2 to 17. A pattern is not observed. Although the administration claims that the firms/stores make an agreement collectively with a transportation company, our research does not reveal such a finding.

5.9. Opinions of the Tenants, Customers and the Armada Administration about the Armada Shopping Center

Location, being the highest advantage of Armada with respect to the tenants and the administrator, turns out to be the third important criterion for the clients. The greatest advantage of Armada for the clients is the capacity of its parking area. Considering that the 67% of the visitors come by private cars, the capacity of the parking area and the relative facilities become an important factor. Location, thus the accessibility, is a significant determinant for the location choice of a shopping center and the store. However, the recent trends in the car ownership the safe and compact structure for the pedestrians are far preferred then the accessibility. This situation contributes to the fragmentation of the city center by attracting the customers from the city center where the parking possibility is limited and the vehicle circulation is favored to the pedestrian use.

The variety and the quality of the product and store are the second important criterion for both sides. Although they agree on the general outline, their regards on this subject varies significantly/substantially. While the tenants care about the Center's range of activities and the existence of highly recognized brands which will increase the total number and variety of customers; clients search for meeting their various needs within the same space. For the administration, on the other hand, the product diversity has a significant role. Besides the maintenance of client loyalty, administration also cares about the ensuring of the consumption of both daily and seasonal goods. Erten's (2008) comment on this is as follows:

> Although the modest state of Armada may seem to be a drawback, we rather consider it as a benefit for those wishing to buy what he/she plans to within a short period of time. The customers are capable of reaching whatever they aim to buy in a short time. Concerning the shopping ratio of the visitors, Armada has the greatest value in Ankara (Erten, 2008)

The research made among the clients support the statements of the administration. The days that the clients visit Armada are evenly distributed within the week and the week-end. Saturday heads as the most visited day, with a ratio of 24%. Sunday and Wednesday follow Saturday with successive ratios of 20% and 13%. 27% of the customers visit Armada once in a week, while 27% come twice a week. 35.9 % of the clients pass 1 or 2 hours in Armada while 30.5 % of them spend 2 or 3 hours.

Hygiene and good maintenance are two important factors for the clients to prefer Armada. Tenants also care about the security in addition to hygiene and good maintenance.

The shortcoming of the Armada Center for both clients and tenants is its accessibility. The accessibility problem is not in the urban scale but rather in the entrance and exit points of the parking area. Land price is the second important issue for the tenants. As the rise in the land prices is reflected directly on the rents, the tenants are ready to suffer from this. Clients, besides the inaccessibility problem, complain about the position/location of the stores.

5.10. Extension Project of Armada Shopping Center: Armada-2

The construction of the extension “Armada-2” will take place in 2009. Armada-2, which will be constructed on the east of Armada, between AŞTİ and Armada, will be a four storey structure with retail and entertainment facilities. Armada-2 is planned to be equipped with entertainment facilities and with a variety of brand new stores to enrich both the quality and quantity for the customers. The administration states that:

> We are thinking about a large music store, an electronics store and an anchor store, which does not presently exist in Ankara, selling domestic goods of high quality. We are going to create, inside a 3,500m^2 play area, the modern version of the classical amusement park (*Luna Park*) addressing all age groups. It will consist of an ice-skating ground, amusement grounds and social spaces.

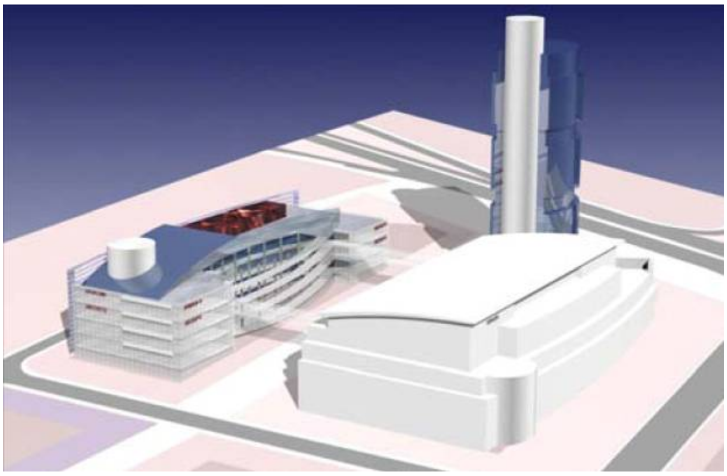

Figure 5.18. Armada-2 Project (Source: (Barbaros, 2005))

The administration indicated that Armada-2 will be an independent structure from the existing building, but there will be passages between the two bodies. There will be a group of cafés and restaurants with outward extensions on the opposite façades of both structures and the area in between will be designed as a street. The street will act as an urban public place serving a variety of activities. Yıldır Erten affirms that Armada, with this additional structure, will provide a center for a range of groups like youngsters, families and businessmen.

5.11. Evaluation

The concentration in the city center basically base on the urban tradition, the highest number of customers, the heavy concentration of activities and stores and accessibility for all the citiens of the city. But the urban sprawl and the increased car-ownership and lack of parking spaces make the city center inaccessible. Besides dispersed city center with undefined and long walking paths with large number of stores spread over make consumers not able to utilise all the choice.

A shopping center is never able to have either the identity of the city center or the number of stores/ activities/ customers or accessible to the entire citizens from top to down. However, the reasons for the customers' prefererence of the shopping center constitute the base for reaching their target stores and clients. Consequenlty, certain stores/ firms serving for a certain group of client are detached from the city center. That is because the shopping centers:

- Mostly situate at one of the best location of the city.
- Easy to access the goods and customers and store staff.
- Upper class customer profile based tenant selection
- Competition among the stores based on the upper class customer profile
- Balanced mix use with the tenant selection and management
- Hygienic, controlled, secure, airconditioned environment
- Elimination of poor and homeless
- Compact; easy to shop around easy to compete
- As stated by Erten (2008):

> Aside from the technical equipments and the developed level of infrastructure, safety and parking facilities, shopping centers offer numerous opportunities for the visitors. Each store is only responsible with its own products, staff and decoration. Everything is taken into account for the comfort of the clients; they, in this context, could only focus to the activities that they planned Erten, 2008).

CHAPTER 6

CONCLUSION AND EVALUATION

In this chapter, the hypothesis about the fragmentation process in Ankara city center is verified through the comparison of the **indicators of the fragmentation processes** determined in the theoretical framework with the findings of our research.

The changing notion of consumption and its reflections on the (consumption) spaces are felt, as it is the case in many other world cities, in Turkey as well notably in the last fifteen years. A wide range of shopping spaces such as the supermarkets, serving the food sector, or the shopping centers offering a variety of social services have all experienced the transformations in the shopping spaces. This type of consumption spaces, alongside their services to the city and the inhabitants; bring about certain conflicts, problems and alterations of urban space and shape their surrounding areas. Supermarkets, bringing about a competitive milieu for notably petty traders, offer a hygienic, safe and controlled shopping milieu and provide opportunities like installment payments. They may, however the results of the increase in the vehicular traffic, also create traffic congestion in their surrounding areas. Shopping centers, through the employment capacity they create and the services they offer, bring significant contribution to the urban economy and stand as alternative spaces for the city center. Consequently, they detach both the populace and the consumption functions from the center. Traditional retailing, which is an essential component of the city center to ensure its sustainability, never set aside customers from the city center. The chain markets and the shopping centers, on the other hand, consciously hold back the customers from the city. While the city centers are self-regulated urban functions, the investors and the administrations impose the development of the shopping centers versus the city center.

Consequently, the demands explain the more fragmented form of the contemporary city center.

6.1. Summary and Findings

Technological changes and the advances in infrastructure and communication revealed the invalidity of the centrality and the primary role of the city center displayed by the urban development theories. These theories also legitimated their position through excluding the reality of **ownership** and **social and economic decompositions**.

Relatively more developed theories included the **transportion investments** to their assumptions, which shifted the significance from the principle of centrality to that of the **accessibility**. To put it in other words, to be an integral part of the transport system, to locate on main connection arteries and on the main junction areas became increasingly more important. Accessibility is not only a simple requisition to travel from one point to another; it also has a public case by the provision of affordable transport service. In this respect, centrality preserves its significance in terms of the public transport.

On the other hand, the theorems which define the urban development on the basis of **capital accumulation**, completely excluded the **self-regulated processes**. According to these theorems, it is the capital which influences and directs the development of cities. Capital, which plays for the maximum profit, ignores the existing spatial structure of the urban area when choosing the location with respect to the holistic analysis required by the land use decisions. These theorems, although they could not develop theories on the basis of the city center, thoroughly commented on the **consumption** activity. The act of increasing the consumption so as to augment the production is considered as a significant input for the urban development. The increase in consumption continuously reshapes the consumption spaces so as to adopt the **augmentation**.

The postmodern urban theorems are developed in accordance with the rise of the private car ownership, the acceleration of **social segregation** and the consequent increase in **spatial segregation**. These theorems introduced the notions of ‘urban sprawl’ and ‘edge city’. While the urban sprawl theorem mostly considered the diffusion of the urban population within residential **suburbanization**, the edge city concept dealt with the

employment subcenters of business and service groups which choose to (detach and) locate away from the city center.

Accessibility, in this framework, is no longer taken as a matter of physical and spatial convenience only; it also has a nonphysical side in terms of the **communication**. Technological advances decreased the traditional importance of **face-to-face interaction** and make the remote sensing sufficient for the conduction of much. And that distorted the central position of the city center.

The urban ecology theorems are focused on the self-regulated development of the urban areas. Whereas the Marxist theorems consider the urban development within a capital based framework and suggest that the capital owners have the power to consciously shape the urban space in order to increase/enforce the production process. Within this study, we suggest that **the urban development is neither simply directed by capital nor it is a natural and automatic process and it is not only the targets and the choices of the decision makers that shape the urban development but it is shaped dialectically by these two factors**. The natural development trends of the urban areas cannot be rejected but it is also true that the capital's mobility and location choice direct the urban development to a significant extent.

Consumption is the production's form on the urban space. In order to increase the production, the consumption should also be increased. The more the consumption augmented, the more the production could be increased. That is the reason why there is a whole market of fashion industry with style shows, fashion magazines, brandnames and so on. The reflection of this on the city is the new consumption spaces. The increase of the consumption could not be achieved within the traditional city center in the desired conditions, in other words it is not possible to increase the consumption through the traditional retailing. That is why the **organized retailing** was developed and encouraged to grow further.

The organized retailing sector, which was first initiated with the supermarkets selling nutrition products only, was developed with the hypermarkets where the side products were added to the foodstuff. Today, the final stage of the retailing sector is reflected within the **shopping centers**. In the final form of the consumption space, not only commercial goods are marketed, but also entertainment facilities are commercialized. In this framework, the visitors who simply come for spending time are also encouraged to consume through the promotions and the display windows.

Besides, the consumers, due to their limited free time, tend to **shop at once** within a fast and efficient shopping seance. The economically active groups usually prefer to visit the organized retailing units of the shopping centers during the week-end days for efficiently using their free time. Today, the organized retailers, with their hygienic and ordered stores, which are located in the majority of the shopping centers, meet the demands with the **variety of the products** and the **diversity of actions**.

In addition, changing consumption patterns increased the gap between different social classes. Different status groups, whose residential areas were already segregated, also experienced a divergence in terms of their consumption patterns and the consumption spaces that they spend their free times. Today, different social classes, which traditionally gathered in the city centers, no longer come across in the new shopping centers serving rather for **homogeneous groups**.

Although the change of the residential area is not practical in terms of the economic conditions of the low income groups, it is relatively easier to change the products they consume and the spaces they visit for consumption. Although they are not economically in the same level, it is a preference for the lower income groups to be among the higher income groups and thus they choose to go the consumption places that high income groups frequently go. The city center, under these conditions, is **abandoned** by both high and low income groups.

The retail market, however, can **not be considered with respect to the consumer only**. The capital, which gave way for the creation of such consumption spaces and which resulted in a competitive milieu for the location in these places, is crucially significant. The **retailers**, who used to prefer to locate in the city center, today favors the shopping centers due to the new tendencies and the opportunities offered by the shopping malls and the technological and transportation infrastructure they provide. That resulted in a dual structure: a brand following the consumer and a consumer prototype following the brands.

Until today, the academic literature usually considered the shopping center development on the consumer basis and did not deeply investigate the reasons for brands settling in the shopping centers. We can talk about two types of stores: those who directly settle in the shopping centers and those who abandon their previous locations in the city center to settle in the shopping malls.

It would be an inadequate approach to say that the brands choose to settle in the shopping centers only to follow the consumers' preference. The firms also consider the existence of other **rival stores** in the shopping center as another reason of preference. The competitive milieu offered by the shopping centers give them the chance to attract the customers of other similar stores.

Furthermore, the **hygienic conditions, security and the compactness** offered by the shopping centers offer the firms to focus simply on the design and the quality of their products to meet the customer demand. When the firm does not own the store, it is the responsibility of the administration of the shopping center to overcome every technical problem. This situation consequently decreases the responsibility of the tenant. The firm, under these conditions, does not have to worry other than the ways to increase the selling of the products.

Through the demonstration of the new concepts on the urban developments without quantitative proof, we could only discuss about the alternative state that can be brought by the shopping centers to the city centers. So this question of fragmentation process of the city center is tested for Ankara through an empirical fieldwork on the basis of Armada Shopping Center.

As it is not quite possible to understand the structure of retail market of Ankara without considering the development of the organized retailing and its present role in Turkey, at first, focused on the retail structure and development of Turkey. In **1950s**, it was first Migros, established through state-supported capital and first operated via bus in the streets of İstanbul, which introduced the organized retailing sector in Turkey. In the following sixty years, more than 100 local and global chain supermarkets and hypermarkets were established. In 2008, the total number of the shopping centers in Turkey, which had taken a start with Galleria in Istanbul in 1988, is 188 in nineteen cities. With respect to the average GLA per person, this ratio is still under the European standards.

Besides the organized retailing development and structrue of Turkey the research concentrates on Ankara's urban development under certain economic and social conditions. Ankara's declaration as the new capital of the young republic changed the image of the small Anatolian town to a new planned city. The city then grew through a plan basis development, which then constituted the distinctive feature of the city. In the early periods of the new capital, the plan-based development maintained the **monocentric** character of the city. After 1950s, however, the legal and physical inadequacies in meeting the urban standards against the rise of rural migration and the fast increase in the urban population disturbed the balance. Due to the failure of creating a formal development pattern, the spatial distance between different economic and social groups started to grow. The differentiation was not only in the residential areas but also in the consumption spaces, which soon created a **dual** urban structure. After 1970s, plans and state support provided legal housing for these groups and developed a western expansion strategy for the city. In this period, with the rise of the private car ownership, the high income groups, following the plan decisions, started to buy land and settle along the south-western corridor. The new residential zones away from the city center also required the development of consumption spaces around their neighboring areas. The first shopping centers which were initially constructed for the basis of simple needs were later transformed to greater scale structures. **Bilkent Center**, in this framework, triggered the development of such consumption-based developments. Parallel to the development of out-of-town shopping centers, the urban transformation projects and investments realized by the Metropolitan Municipality of Ankara triggered out-of-town investments. This is, of course, not a single sided induction. The urban authorities contributed to these processes through their investments and location choices. In this framework, the investments on the transport sector first took place not to increase the efficiency of the vehicular traffic or to increase the mobility of the capital within the city, but rather to offer the capital the means to invest on the location it would prefer. In the late 1990s, the dual process, that is capital's location choice in the city and the natural development of the urban area, started the **fragmentation** process of the city center. The center of Ankara then started to differentiate from the classical definition of a city center.

Evaluating Ankara in the period after 1990, we see that the transport infrastructure was fastly renewed by the central and local administrations and new ring roads were constructed. Parallel to the developments in the highways, big capital groups created new commercial and business centers alternative to the city center, and they established new residential zones in every point that were accessible by the highway network. Within this process, we see that the public investments tend to give way to the speculation-based investments of the private sector. In this development startegy determined by the free market, the lack of a plan which looks after the public good encouraged the private sector. The local plans prepared by the local administration and the changes in the development (and implementation) plans gave opportunities to the private sector investments.

Ankara's being the capital city reveals the significant role played by the public buildings on the employment and economic structure of the city. During the period of eighty years following the declaration as the capital, the continuous **relocation of the public buildings** changed with respect to the planning and governmental decisions, and economic instabilities. Today, we see that the majority of the public investments shifted from the center to out-of-city (to the peripheral areas). This shift resulted in the detachment of a large number of workers from the city center. In addition, the institutions which are in direct contact with the state also abandoned their central locations to move to neighboring areas of the public buildings.

The location choices of public institutions outside the city not only lead to the separation of the employees from the center, but also affect the location choice of business and institutions in direct relationship to these public institutions outside the city. At the same time, with the movement of public institutions outside the city, the investments in transportion and communication infrastructure also accumulated with this movement. Although the locational choice of public institutions is a process that is shaped independently from both the municipality, and also the central government most of the time, and is made by the decision-making processes of the public institutions of themselves.

In addition to the tendency of employment subcenters to break away from the city and the development of transportation as a support for this process, the increase in the number of suburbanization of the gated communities on the western, southwestern and northern axis affected the fragmentation of the center. Such groups that prefer living away from the inner city reproduce the concept of “gated” in the commercial and business environments of the city of Ankara. Thus, these groups do not prefer the city center as their workplaces or places to fulfill their needs. The absence of planning leads to a piecemeal development and inappropriate placement of activities in Ankara.

The city center, hence, is **no longer single** and **unique** (but multiple) (Burgess, 1925; Hoyt, 1939; Harris and Ullman, 1945; Christaller, 1966). The traditional center lost its **geometrically central** character and spread with respect to the high-income classes (Christaller, 1966; Lefebvre, 1974; 1996, Castells, 1977). The increasing number of private cars invalidated the old meaning of centrality in terms of the accessibility and the city center **lost its accessibility** character as it was not structured for the circulation of such a vehicular traffic (Hoyt, 1939; Johnson, 1996; Pacione, M., 2003). In addition, the city center is **no longer taken as the center of social, political and economic life as certain (high income) groups are detached** from the center (Roebuck, 1974; Hurst, 1975; Holcomb & Beauregard, 1981; Whyte, 1990; Lefebvre, 1996; Sudjic, 1996; Johnson, 1996; Oc & Tiesdel, 1997; Tomalin, 1998; Wooley et.al., 1999; Worpole, 1992). Today, **a life without going to the city center is quite possible**.

In 1998, the establishment of an out-of-town hypermarket, a construction market and a retailing park that it consequently (*Bilkent Center*) affected the consumption habits of a large number of populations. The synergy created by this sort of shopping centers increased the mobility of the capital in Ankara and, hence, paved the way for the construction of further shopping centers. Consequently, shopping centers of different size and types were constructed. Today, there are 522 supermarket, 19 hypermarket and five bigboxes in the 29 shopping centers of Ankara.

The retailing sector in a city, where the total number of the shopping centers is so high is expected surely to be influenced in a significant extent. With the shaping of new consumption patterns and habits, new consumption spaces are constructed. The impact of middle, large and very large scale shopping centers on the city center is clearly remarkable. The small scale shopping centers usually show their influences on the district centers.

The shopping centers of Ankara, in this respect, are studied with respect to the land use of their surrounding area, the transport facilities, the further investments they encouraged and the mixuse profile of each. The organized retailing market in Ankara, hence, is thoroughly evaluated by considering the developments in both city center and in these shopping malls. The negative interaction between these two, however, is demonstrated through the tendencies of the dead malls. The situation is not the same for every shopping mall. Unsuccessful management, bad choice of location and the lack of supportive activities resulted in the demise of some shopping centers. Here, we suggest that certain preventive measures needs to be taken in order to prevent the occurrence of such decline in the city center.

There are various studies about the relationship between the changes in the retailing sector and the urban structures. However, there are few theoretical studies about the development or restructuring of modern retailing sector and its effects on urban space and existing retail formats is very low in developing countries and in Turkey. The existing academic works which are usually based on consumer questionnaires do not provide a retailer based framework. It is usually the consultant firms of the shopping centers or the ICSC or the international or national real estate firms which conduct retailer based researches. Their work, consequently, tends to rationalize and praise the shopping centers and the chain markets.

In this framework, the fragmentation process experienced in Ankara city center is investigated through the empirical study conducted on the Armada Shopping Center. Here, unlike the present literature which usually adopted a user-based approach, we aimed at developing a broader scope by the consideration of the view of the (organized) retailers. **Armada** is evaluated in terms of the regards of both the management and the brands settled. The rationale of preferences of Armada to the city center is investigated. They were questioned about the advantages and disadvantages of the Armada shopping center so as to consequently reveal the deficiencies and the disadvantages of the city center from the point of view of the retailers. As a result, we see that the retailers prefer to settle in the shopping centers due to a number of factors:

- Internalization of externalities;
- Position of the shopping centers in one of the most accessible locations of the city,
- Accessibility of the goods, customers and store staff;

- Selection of the tenants with a target of upper class customer profile;
- Competition among the stores based on the upper class customer profile;
- Balanced mix use with the tenant selection and management;
- Comfortable shopping area: Hygienic, controlled, secure and air-conditioned environment;
- Elimination of poor and homeless;
- Compactness; easy to shop around, easy to compete;
- Brands are only responsible with the design of their stores, with their goods and with the personnel they employ.

It does not mean that 29 shopping centers and 526 chain markets take apart all the retailing units of the center, but their existence contribute to the transformation of the city center. In this framework, there is a transition in the fields of activity of the city center (from service sector to the specialized retailing). Besides, the size of the capital of the retailing units decreases (relatively small size and traditional enterprises stay in the center). And, parallel to the changes in the capital sizes, user groups are changing. The brands which address to higher income groups favor the shopping malls.

As a result, the capital distribution over the urban space results in an unbalanced and unequal situation. In this context, the act of (urban) planning should aim at finding the optimum balance between the profits of three main agents: the **citizens,** as consumers and employees, **business establishments** and **institutions**, and **public investments**. The task of the act of planning, hence, must be to propose optimum development strategies concerning both the present and future goods, demands and needs. Accordingly, the major agents should all be taken into consideration.

It is obvious that the role of Ankara as the capital of a developing country is significant in this fragmentation process. In every case, the impacts of different shopping centers to the city center are numerous. However, this impact can transform into a problem in the cases when to develop, where to locate and what to hold is not planned and controlled. Developed countries surpassed these problems twenty or thirty years ago by adapting their legal and institutional frameworks to the requirements. In Turkey, however, the studies in this field took place only after 2004. “The Bill Law on Large Stores Related with the Sales of Consumer Goods and Materials”[13] was brought to the agenda of the parliament last in February 24 of 2005. Below, we point at certain significant points through the evaluation of the unfinalized draft which is still inadequate in its scope.

There are certain deficiencies in the context of the current law concerning the definition of the “big stores”. First, there is a conflict as the definition starts with the phrase of “considering the sales areas” but continues with a reference to “renting and/or selling areas”. Second, as the concept of “sales area” is not defined explicitly, one cannot be sure about the attributes of the functions included (By this definition, one cannot be sure whether the functions such as cinema and event hall are included in the sales area). Third, the rationale of 400 m^2 is not mentioned. Fourth, the spaces of different types and sizes, such as supermarket, hypermarket, mega market, gross market and discount stores, are classified under the same definition. Finally, the “and/or” statement in the “renting and/or selling area” phrase, results in the classification of the shopping centers equipped with cultural and entertainment facilities within the same category as the simple shopping centers.

The fourth article concerning the permit of establishment of the “big stores” whose sales area is smaller than **3,000 m^2** states that the permission is given by the governorship with the agreement of the municipality and that the governor could transfer this authority to the assistant governor or to the mayor. However, it is not possible to understand the rationale for this shift of authority within the municipal boundary and in the limits of the development plan. The assistant governor and the mayor represent two different institutions in terms of their duty, authority and the area of specialization. Besides, the current legal framework does not validate the transfer of the governor’s authority to the mayor.

In the same article, the expression that “the permit of establishment of the “big stores” which are situated in the commercial zones determined by the development plan or those are properly located in terms of their environmental organization, and which has a sales area between 3.000 m^2-15.000 m^2 is given by the governorship” disturbs the integrality of the planning procedure. The transfer of the authority to the governorship in the settlements where there is not a development plan or where the location is not

[13] *Tüketim Maddeleri Ve İhtiyaç Malzemelerinin Satişiyla İştigal Eden Büyük Mağazalar Hakkinda Kanun Tasarısı*

determined with respect to the plan decisions, results in the making of location choices in a patchwork fashion. In this case, the punctual decisions disturb the plan integrality as the overall dynamics of the urban development are not considered.

The decree that "the permit of establishment of the out-of-town "big stores" which has a sales area greater than 15.000 m^2 are given by the ministry" reveals that the transfer of the development authority to the Ministry of Industry and Trade would pose an obstacle for the planned development of the cities. In this context, the shift of authority of preparing and approving the plans among different institutions should be reconsidered to ensure the integrality and stability of the planning process.

The phrase that "the areas allocated for commercial activities in the development plan" which is in the fifth article of the law concerning the "permit of establishment criteria" is a positive determination. However, the concept of "commercial center" is not treated by the Development Law. In this sense, there is a requisition either for the definition of this notion with reference to the Development Law or the adding of a new concept to the Development Law pertaining to the "big stores"

In the same article, the announcement about "the conformity of the areas for the establishment of big stores" is not clear. Besides, the criterion added to this decree does not provide a commensurable framework and standards, but give way to the complicated implementation processes. However, the locations and the permit of establishment of the "big stores" should be determined with respect to the overall identity of the city. The economic structure and socio-cultural composition of the city, the demographic structure, the size of the service area, the distance to the transport nodes, the infrastructure opportunities and the relationship with the land use in the surrounding area should be carefully studied. The location choice procedure should be considered, not simply with respect to the superficial criteria defined by the law, but with respect to certain scientific analysis and findings.

The amendment does not treat existing "big stores". As it is not possible to destroy or change the location of the existing shopping centers, certain measures should be taken for the rehabilitation and organization of these structures.

The draft about the “big stores’ selling of the consumption goods and goods of need” should not simply be evaluated on the basis of single structure and as punctual investment and use. On the contrary, they should be considered with their overall effects on the physical and social structure of the place that they are built in. The location of the big stores should be determined with respect to the identity and the economic, social and cultural structure of the city. The size of the environmental impact area, city’s position on the region, transport infrastructure, accessibility, infrastructure facilities, development plans, and the characteristics of the surrounding urban layout should be taken into account.

The countries of European Union, in the context of the legislative structure that they put into practice for commercial activity and areas, develop different definitions, methods and rules for the consumption spaces of different sizes. In this respect, supermarkets, hypermarkets, mega markets, gross markets and discount stores are taken into account distinctively with respect to their locations on the urban space. Although all of these notions are present at the law in an unclear fashion, the scope of the law, which classifies each commercial space in the broad category of “big store” and which determines their location only on the basis of floor areas without considering the planning principles, is very narrow. Yet, the draft bill should be reconsidered by asking the opinion of a wide part of the society and should elaborately take into account the country conditions, urban development dynamics and the movement of international capital.

The laws, unless they are supported by a rigorous planning practice cannot provide an adequate framework for the implementation process. In order to **protect** the city centers and the traditional retailers against the organized retail, one has to understand the factors ensuring the sustainability of the (traditional) city centers. The laws, in this sense, provide only a base for the implementation processes and they have to be vigorously integrated into the planning practice. Note that the term of **planning** here is not employed as a **picture** displaying the final product; it rather points to a **process**. In the scope of our study, we emphasized that the planning as a process is only possible with a clear and universal compromise on the **definition** and the **possessors** of the city centers. In this framework, there is a need to neatly define the limits of the city center and to assign the respective responsible unit. This unit has to be capable to build up a development strategy for the development, transformation and the possible fragmentation process of the city center. The unit should also be equipped so as to direct the urban developments and investments regarding the city center.

In the scope of our study, we often put forward the negative role played by the lack of a rigorous and integrated authority and the fragmented planning on the fragmentation process. That is why an emphasis on the definition of the notion of **belongingness** and on the determination of the r**esponsible possessors** of the city center were put. Today, although the fragmentation process of Ankara is not at a serious level, this study shows that the organized retail become increasingly widespread in Ankara and in other Turkish cities and it seriously affects the structure of the city centers. In this framework, in the absence of a rigorous intervention with an effective-timing, the city centers may face irreversible situations and there might emerge some alternative sub-centers which are more powerful than the traditional city center. Consequently, the regeneration of the city center, which is expected to be the unique and most vital component of the city, may become economically and socially impossible.

6.2. Further Studies

This thesis considers the fragmentation process of the city centers with a scrutiny based on the organized retailing units. Within another study, the effects of the traditional retailers on the fragmentation process of Ankara city center can be evaluated. However, the lack of a rigorous database pertaining to these units which are not numerically excessive, would direct the study throughout the determined professional branches.

The enrichment of this descriptive study with supportive quantitative questioning with a data based on the enterprises registered to ATO could make the fragmentation process of Ankara city center clearer.

Besides, the study identifies the present position of the organized retail in Ankara which is in rapid transformation and offers an inclusive database on the shopping centers of Ankara in 2008. A future update would allow the possibility to compare the changes in the organized retailing sector in Ankara.

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APPENDIX A

SHOPPING CENTERS IN ANKARA

Table A.1 Operational Shopping Centers

Name	Owner / Developer	Location	Date of opening	GLA m^2	Number of Units	Main Tenant / Anchor	Activities	Accompaniment Investments
Atakule	Atakule Gayrimeknul Yatırım Ortaklığı A.Ş.	Çankaya	1989	17,671	86	Hypermarket	Movie Theatre, Children Play Area, Wedding Hall	Atakule
Karum	Karum A and Ticaret A.Ş. (Nurol)	Gazi Osman Paşa - Kavaklidere	1991	23,500	486	-	-	Office, Hotel
Galleria	Bezci İnaşaat	8. Cadde No:53 Ümıtköy	1995	7,771	103	Supermarket	Bowling, Billiard, Children Play Area, Ice Skating	-
Ansera		Portakal Çiçeği-Çankaya	1997	20,000	115	Supermarket	Movie Theatre	Housing
Ankuva		Eskişehir Road 8.Km. Bilkent	1998	15,000	70	Bowling	Bowling, Billiard, Children Play Area	Bilkent Center
Bilkent Center	Tepe Grubu	Eskişehir Road 8.Km. Bilkent	1998	47,350	22	Hypermarket, Do-It-Yourself Store	Movie Theatre, Children Play Area	Housing, Office
Mesa Plaza	Mesa A.Ş.	Eskişehir Road	1999	14,000	56	Supermarket	-	Office, Housing

Table A.1 (continued) Operational Shopping Centers

Name	Owner / Developer	Location	Date of opening	GLA m^2	Number of Units	Main Tenant / Anchor	Activities	Accompaniment Investments
Ankamall	Yeni _imat A.Ş	Konya Devlet Road Akköprü Mevkii	1999	106,480	302	Hypermarket, Do-It-Yourself Store	Movie Theatre, Theatre, Children Play Area	Hotel
CarrefourSA Trade Center	CarrefourSA	İstanbul Road 12.km Batı Kavşağı Jandarma Karşısı Batıkent	2001	15,769	57	Hypermarket	-	-
Armada	Söğütözü A.Ş.	Eskişehir Road No:6 A Blok Kat:1 06520 Söğütözü	2002	32,000	161	Hypermarket, Department Store	Movie Theatre, Children Play Area	Office
FTZ	FTZ Ltd. Şti	Keçiören	2003	7,000	42	Hypermarket		Office
Arcadium	Taşeli İnşaat Ticaret ve Sanayi Ltd. Şti.	İkinci Bölge ÇayRoad Yeni Mahalle	2003	15,000	83	Hypermarket	Movie Theatre	-
ODC	ODC İnşaat A.Ş	Yüzüncü Yıl	2003	8000	18	Hypermarket, Do-It-Yourself Store, Course	Sports Center	-
Optimum Outlet	Rönesans GYO	Eryaman Ayaş Road No:93	2004	16,314	65	Hypermarket, Do-It-Yourself Store	Movie Theatre, Ice Skating, Bowling, Wall Bars	-
Plaza		Pursaklar	2005	6,500	25	Hypermarket		

Table A.1 (continued) Operational Shopping Centers

Name	Owner / Developer	Location	Date of opening	GLA m^2	Number of Units	Main Tenant / Anchor	Activities	Accompaniment Investments
Planet	Planet A.Ş	Elvankent-Etimesgut	2005	12,000	136		Movie Theatre	Housing
Dolphin	Yunus İnşaat	Eryaman	2005	20,000	97	Hypermarket	Movie Theatre, Hypermarket	Housing
KC Göksu	KC	Eryaman	2006	35,365	129	hypermarket	Movie Theatre, Children Play Area	
Antares	Dolunay A.Ş.	Etlik	2007	112,100	206	Hypermarket, Do-It-Yourself Store	Movie Theatre, Bowling, Boccia, Children Play Area,	Housing, Office
CEPA	Çelebcioğlu	Söğütözü	2007	70,000	170	Hypermarket, Do-It-Yourself Store	Movie Theatre, Children Play Area	Office
Panora	Merkez Müteahhtilik Turizm ve İşletmecilik A.Ş. (Salih Bezci)	Or-an	2007	80,000	180	Hypermarket	Movie Theatre, Sports Center, Children Play Area	Housing
Minasera		ÇayRoad	2008	10,000	43	Supermarket	Movie Theatre	-
Galaxy Center		Erymana- güzelkent	2008	7,000	20			
Galleria		Eryaman	2008	7,700	20		Course	

Table A.1 (continued) Operational Shopping Centers

Name	Owner / Developer	Location	Date of opening	GLA m^2	Number of Units	Main Tenant / Anchor	Activities	Accompaniment Investments
Üstün Dekocity	Üstün	Eskişehir Road	2008	17,000	86	Hypermarket	Exhibition Hall, Beauty Center	-
Zirvekent Corio - 365	Corio	ÇayRoad	2008	59,700	98	Hypermarket, Do-It-Yourself Store	Movie Theatre	Housing
Acity Outlet	Ender İnşaat	Fatih Sultan Mehmet Bulvarı No : 244 (İstanbul Road)	2008	22,000	140		Theatre, Wedding Hall, Ice Skating, Mısır Çarşısı, Meeting Rooms	-
Forum	Multi Türk Mall	Fatih Sultan Mehmet Bulvarı	2008	80,000	147	Hypermarket, Do-It-Yourself Store	Movie Theatre, Bowling, Gokart, Paintball, Bungee Jumping, İce Skating, Children Play Area,	-
Malltepe	İller Bankası	İstanbul Road	2008	54,095	160		Movie Theatre	-

Table A.2. Shopping Centers Under Construction

Name	Owner / Developer	Location	Date of opening	GLA m^2	Number of Units	Main Tenant / Anchor	Activities	Accompaniment Investments
Arena	Hasan Koç and Hüseyin Koç	Eskişehir Road	2009	18,000		Do-It-Yourself Store	Movie Theatre	-
Kentpark	Megatürk A.Ş.	Eskişehir Road	2009	68,000	220		Movie Theatre, Children Play Area, Sports Cluv, Ice Skate	Housing
Gordion	Redevco	Ekişehir Road	2009	53,916	165	Hypermarket	Movie Theatre, Children Play Area	Housing
Armada-2	Armada	Armada Söğütözü,	2010	15,000		Houseware	Lunapark	
Sosyetik		Celal Esat Arseven Cad. 313/10 Hasköy	2009	16,000				
Atlantis	Ankara Büyükşehir Belediyesi	Batıkent	2010	55,000	162			Housing
Aymet		Köroğlu		18,000	83			5* hotel, health, Sports Center,
Anse	Kartallar Şirketler Topluluğu	Ekişehir Road	2009	70,000			Children Play Area, Congress, Multi-use Organization Area	otel
CarrefourSA - 2	CarrefourSA	Carrefour Batıkent,	2009	10,000				

ACITY

Figure A.1. ACITY Shopping Center

Figure A.2. ANKAMALL Shopping Center

ANSERA

Figure A.3. ANSERA Shopping Center

ANKUVA

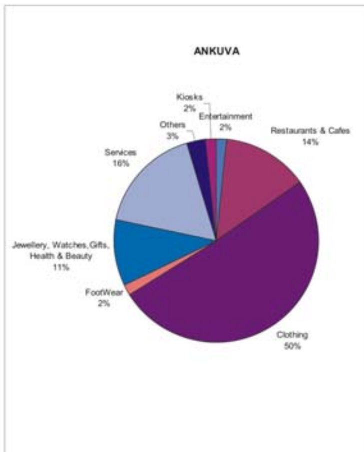


Figure A.4. ANKUVA Shopping Center

ANTARES

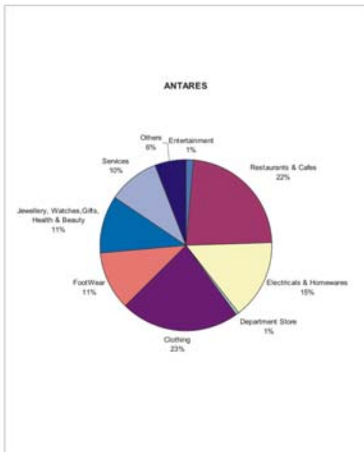


Figure A.5. ANTARES Shopping Center

ARCADIUM

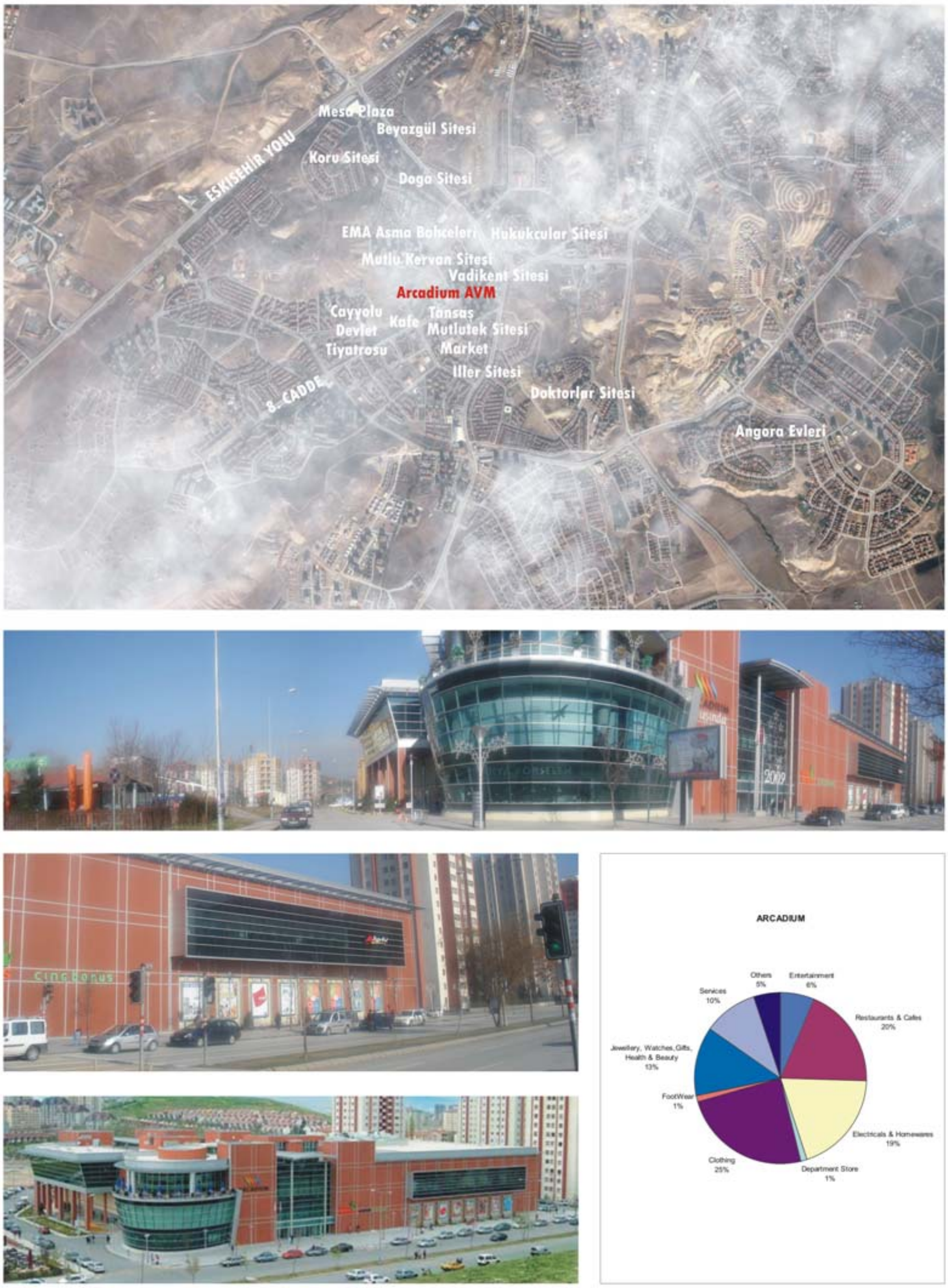


Figure A.6. ARCADIUM Shopping Center

ARMADA

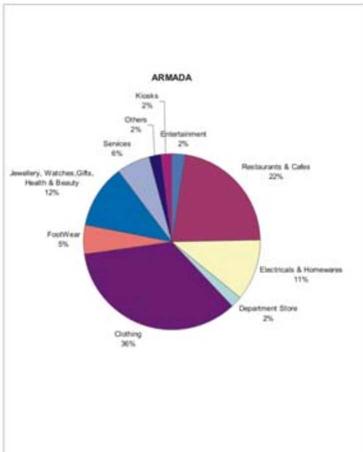


Figure A.7. ARMADA Shopping Center

ATAKULE

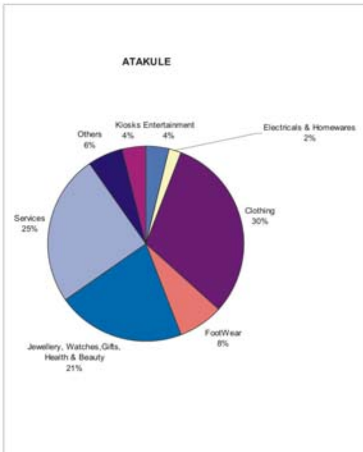


Figure A.8. ATAKULE Shopping Center

BİLKENT CENTER

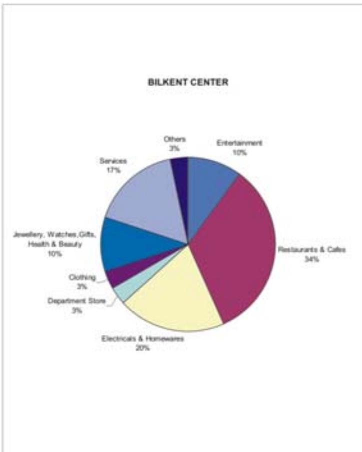


Figure A.9. BİLKENT CENTER

Figure A.10. CARREFOUR Shopping Center

CEPA

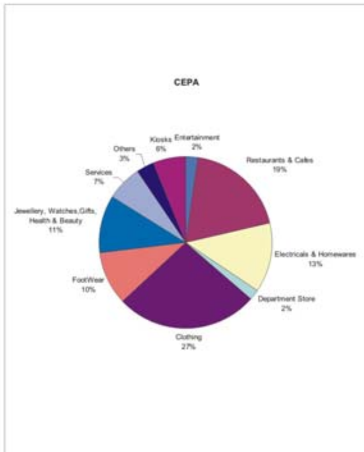


Figure A.11. CEPA Shopping Center

DOLPHIN

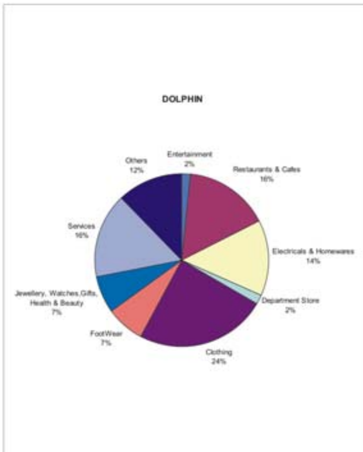


Figure A.12. DOLPHIN Shopping Center

FORUM

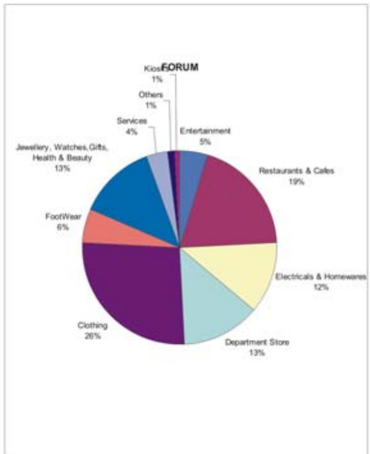
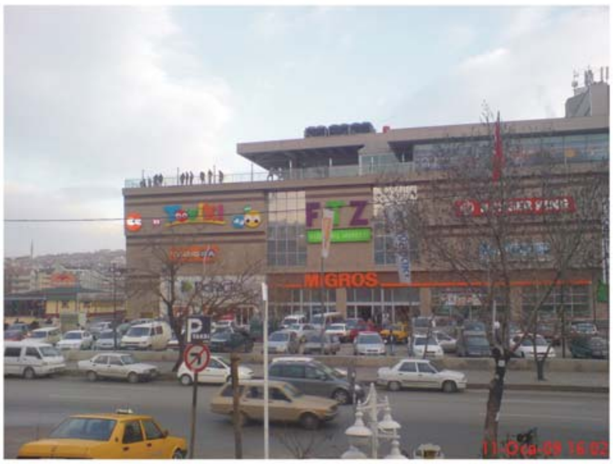


Figure A.13. FORUM Shopping Center

FTZ



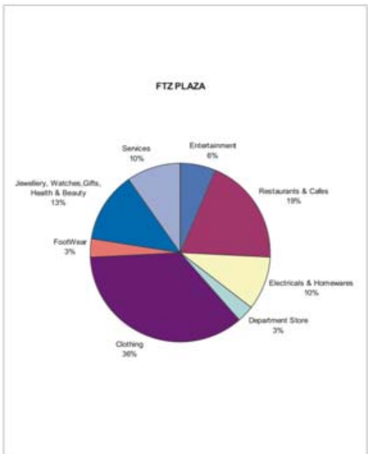


Figure A.14. FTZ Shopping Center

GALAXY

Figure A.15. GALAXY Shopiing Centrer

GALLERIA

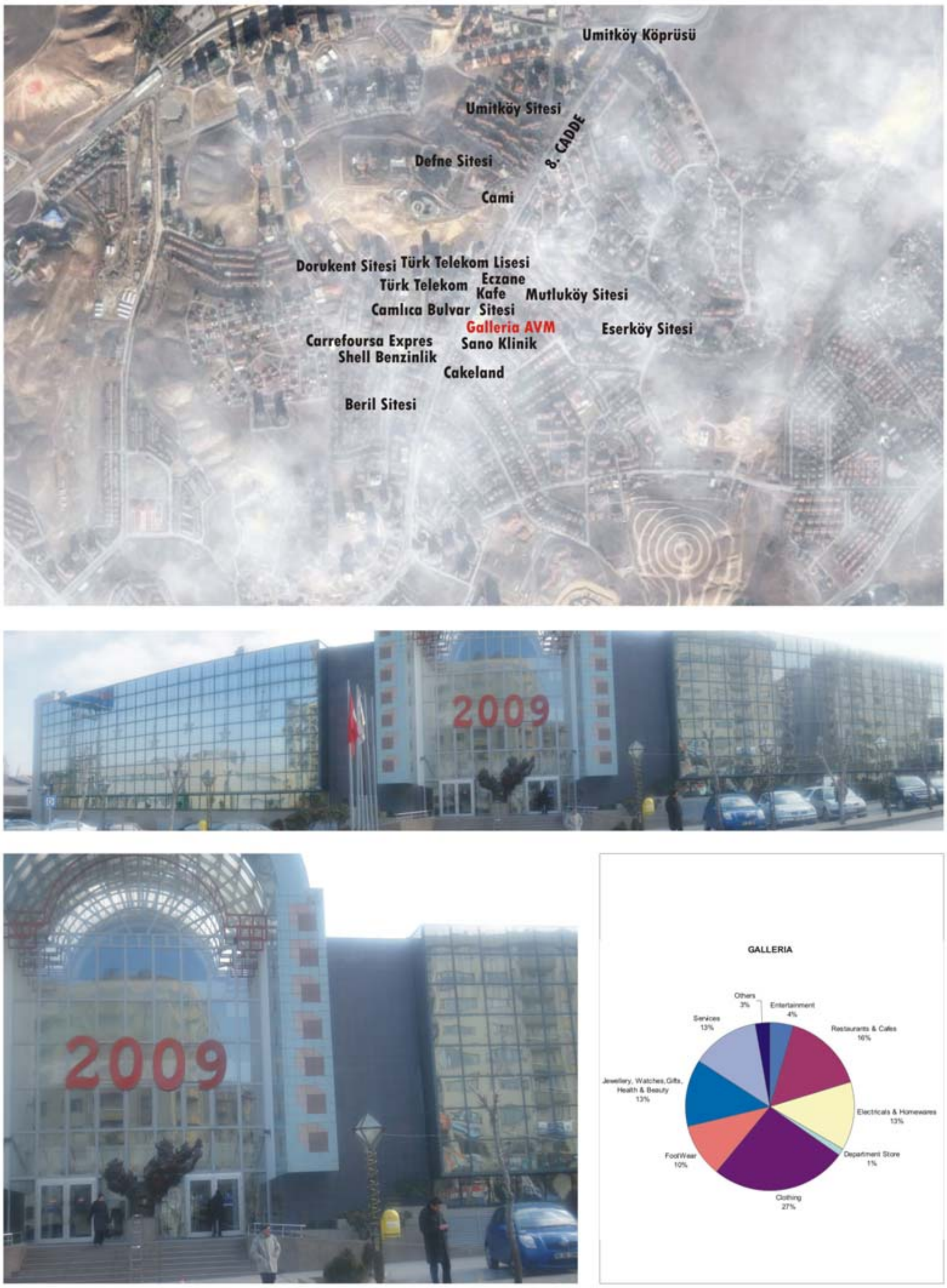


Figure A.16. GALLERIA Shopping Center

GALLERIA ERYAMAN

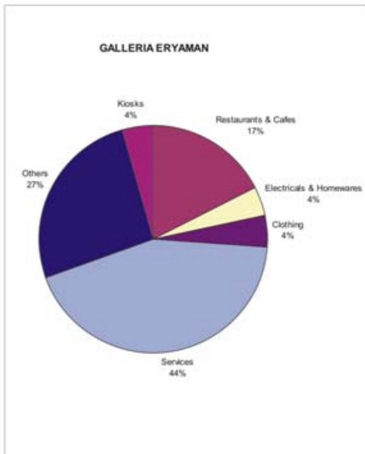


Figure A.17. GALLERIA ERYAMAN Shopping Center

KARUM

Figure A.18. KARUM Shopping Center

KC GÖKSU

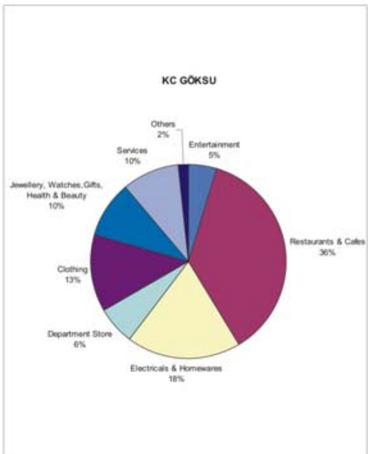


Figure A.19. KC GÖKSU Shopping Center

MALLTEPE

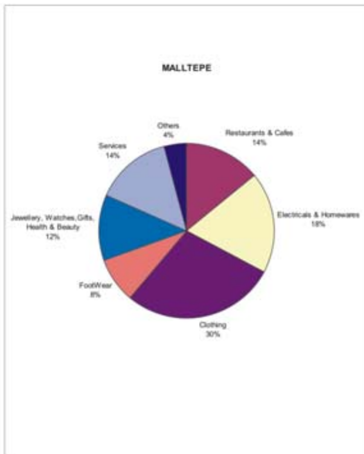


Figure A.20. MALLTEPE Shopping Center

MESA PLAZA

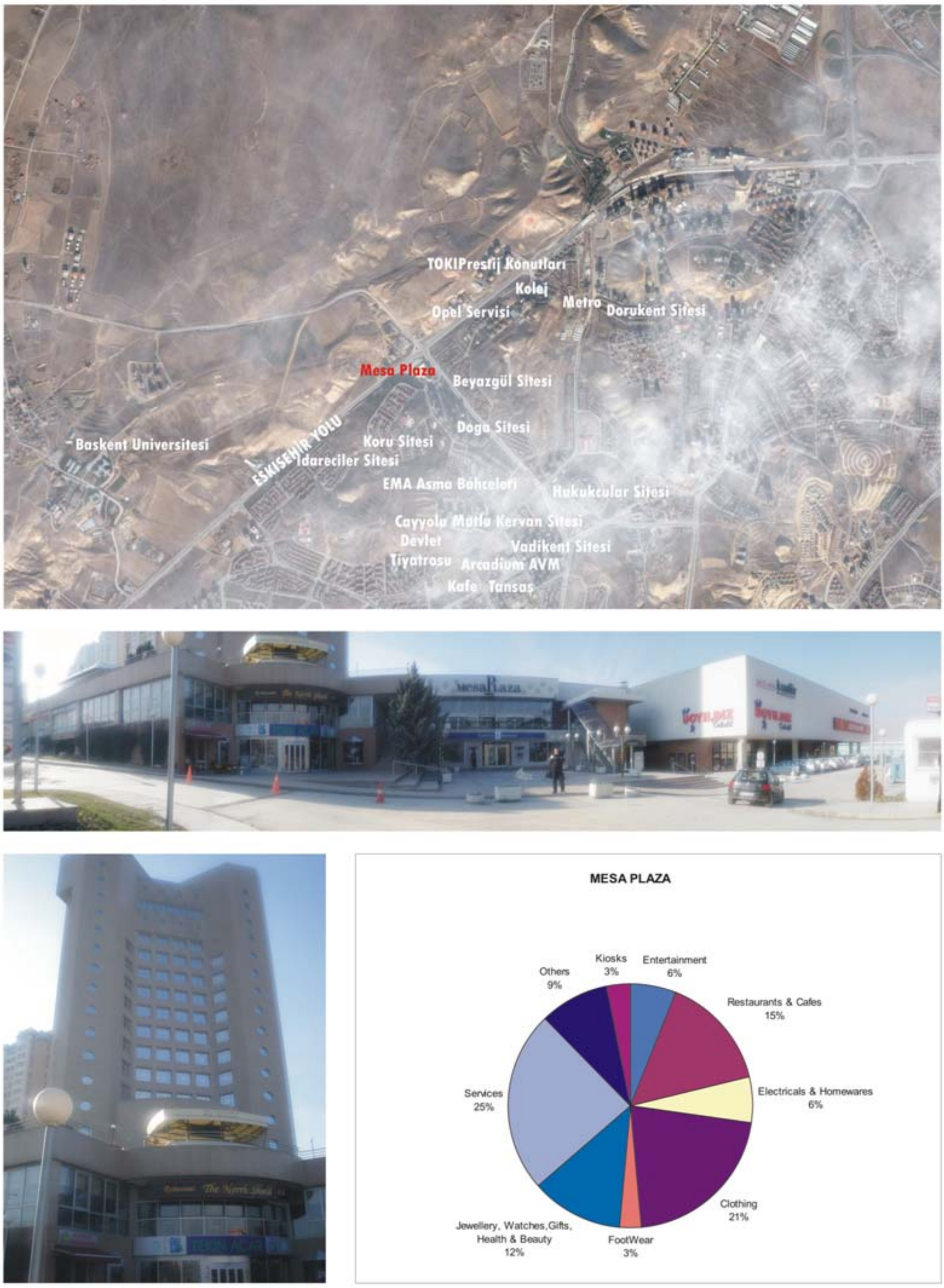


Figure A.21. MESA PLAZA

MINASERA

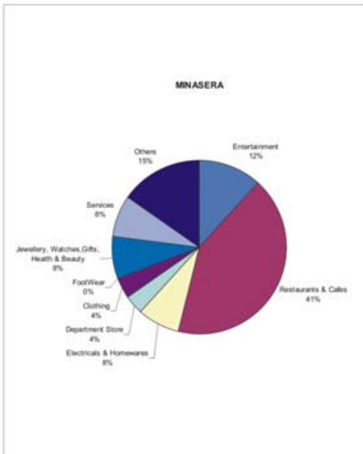


Figure A.22. MISASERA Shopping Center

ODC

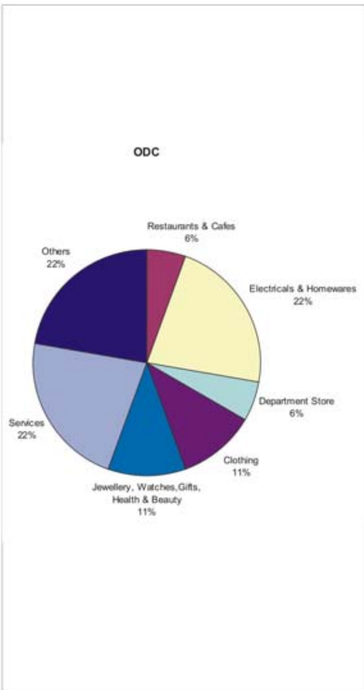


Figure A.23. ODC Shopping Center

OPTIMUM

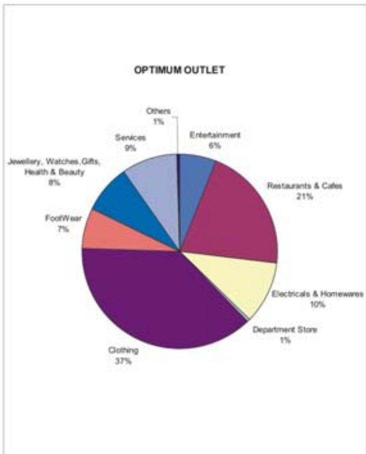


Figure A.24. OPTIMUM Shopping Center

PANORA

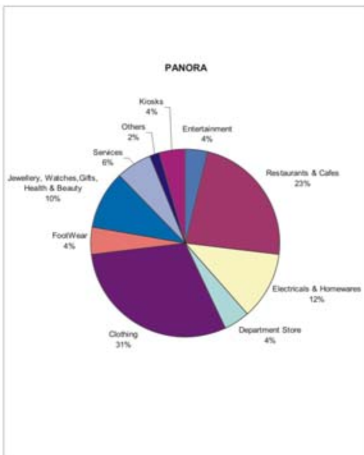


Figure A.25. PANORA V

PLANET

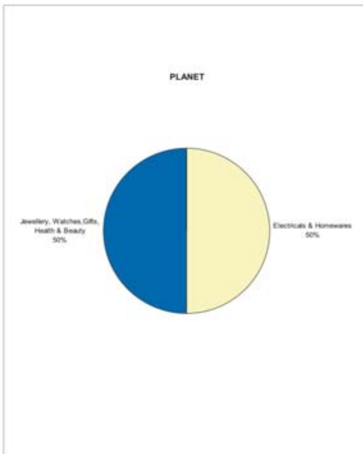


Figure A.26. PLANET Shopping Center

ZİRVEKENT 365

Figure A.27. ZİRVEKENT 365 Shopping Center

PLAZA

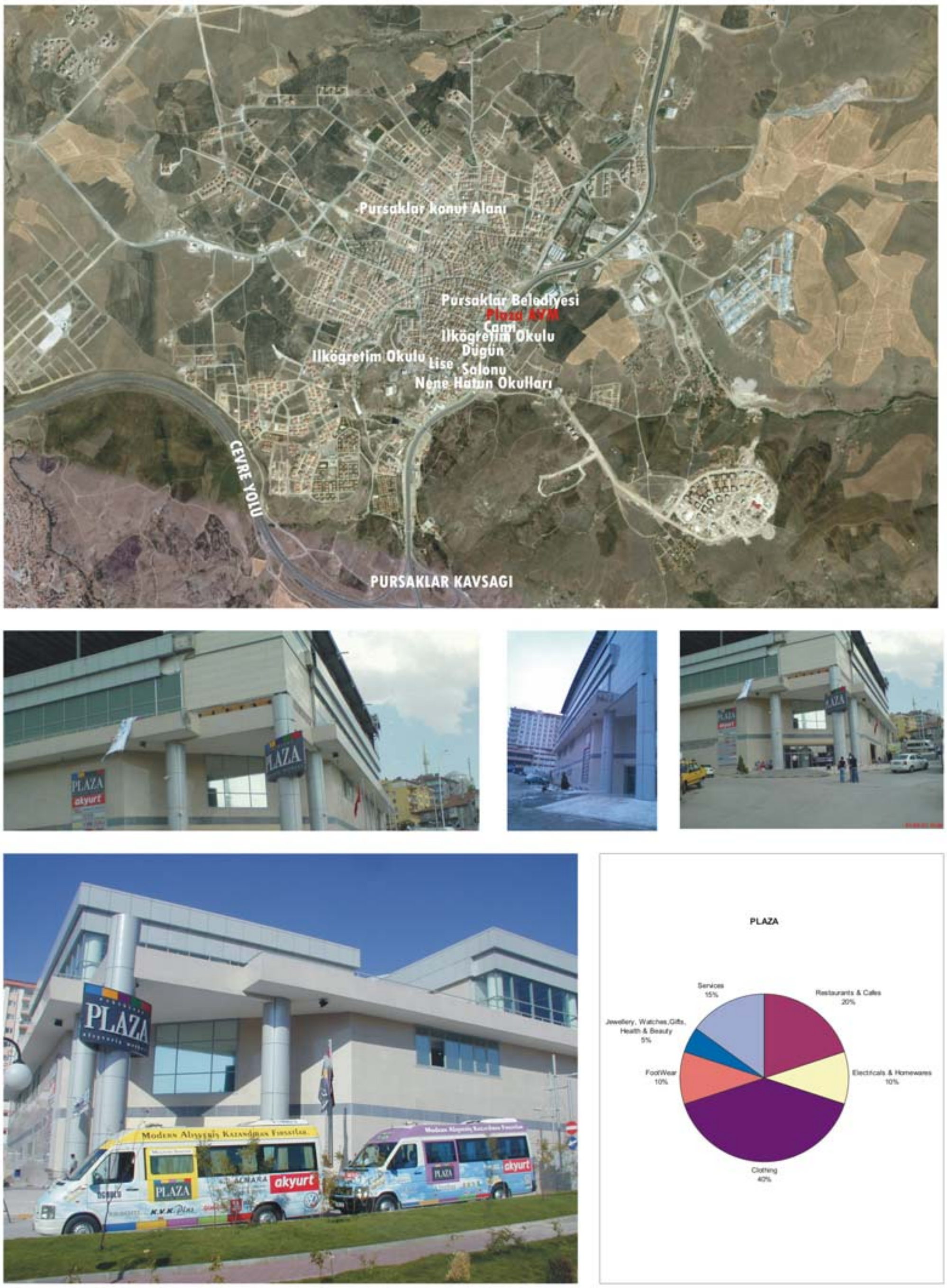


Figure A.28. PLAZA Shopping Center

USTUN DEKOCITY

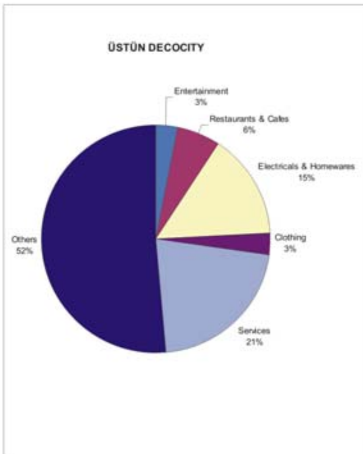


Figure A.29. USUTUN DEKOCITY Shopping Center

APPENDIX B

QUESTIONAIRE

1. İşyerinin ünvanı (Firması veya tüm adı):
2. İşyerinin kapı numarası:
3. İşyerinin ana faaliyet konusu:
4. Aşagıdaki mesleki kuruluşlardan hangisi(leri)ne üyesiniz:

   Sanayi odası Ticaret Odası Esnaf ve Sanatkarlar Odası

   İşveren Sendikası Diğer (Açıklayınız)
5. İşyerinizin
   a. Kuruluş tarihi:
   b. Bugünkü konuda faaliyete başladığı tarih:
   c. Bu adreste faaliyete başladığı tarih:.
6. Çalışan sayısı:
   a. İş sahibi ve ortakları:
   b. Ücretli çalışan sayısı:
7. (Perakende Ticaret ise) Yıllık Ciro Aylık Ciro
8. Teşebbüsün bu adrese gelmeden daha önce bulunduğu adres var mı?

   Evet / Hayır

   Evet ise açık adres:

   Mülkiyet durumu: Ayrılmadan önce: kiracı/ sahip

   Ayrıldıktan sonra: kirada/ satıldı/ boş

   Ayrıldıktan sonra yerine gelen teşebbüsün faaliyet kolu:

   Neden ayrıldığı:
9. İşyerinin büyüklüğü (m^2 cinsinden):

10. Teşebbüsün başka bir tesis, fabrika, şube, depo, ardiye v.s. gibi yardımcı işyeri var mıdır?

    Evet/ hayır

    Evet ise: Tesisin bulunduğu yer(ler)i belirtiniz (açık adres):

11. a. İşyerinizin kurulmasındaki (aşağıdaki) kuruluş yeri faktörlerinden hangileri etken olmuştur?

    b. Bugün hangilerinde zorluk ve mahsurlar vardır

    c. Aynı faaliyet kolunda yeni bir kuruluş için hangi faktörler sizce çok zaruridir

	Erişilebilirlik	Güvenlik	Konum	Çevredeki diğer işyerleri	Hizmetler	Altyapı	Arazi fiyatı
A							
B							
C							

12. Ürettiğiniz veya sattığınız mal ve mamüllerin başlıcalarının isimlerini yaklaşık olarak miktar göstermek üzere belirtiniz

Üretilen/ satılan	Miktar (adet)

13. İşyerinizde çalışan personelin oturduğu semtleri ve her semtte oturan çalışan adedini belirtiniz

Sokak adı/ Semt	Adet	Sokak adı/ Semt	Adet

14. Aynı faaliyet kolunda yeni bir işyeri açmak isterseniz nereyi tercih edersiniz?

    Ankara içinde:

    Ankara dışında:

15. Armada'nın Ankara'da yer alan diğer alışveriş merkezlerine gore avantaj ve dezavantajlarından en önemli 3 tanesi nelerdir?

    Avantajları: konum ulaşım mağaza profili müşteri profili yönetim
    eski alışveriş merkezi olması diğer:

    Dezavantajları: konum ulaşım mağaza profili müşteri profili yönetim
    eski alışveriş merkezi olması diğer:

APPENDIX C

ARMADA SHOPPING MALL FLOOR PLANS

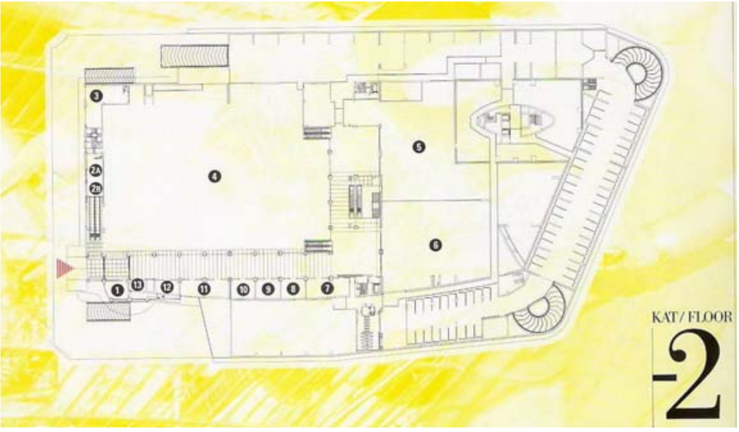


Figure C.1. Plan of Floor -2

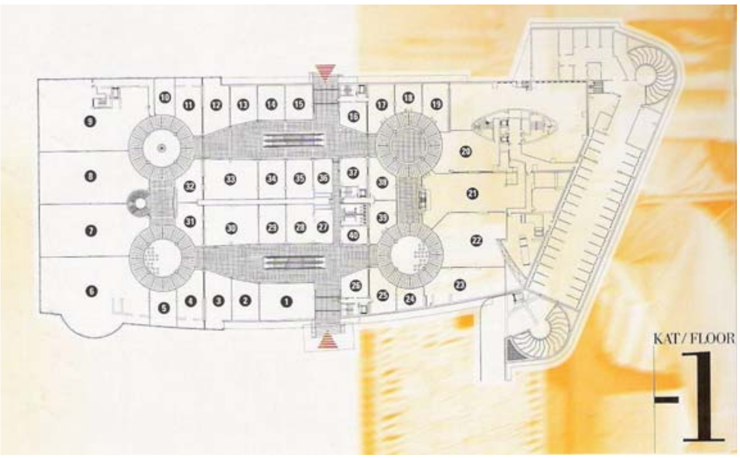


Figure C.2. Plan of Floor -1

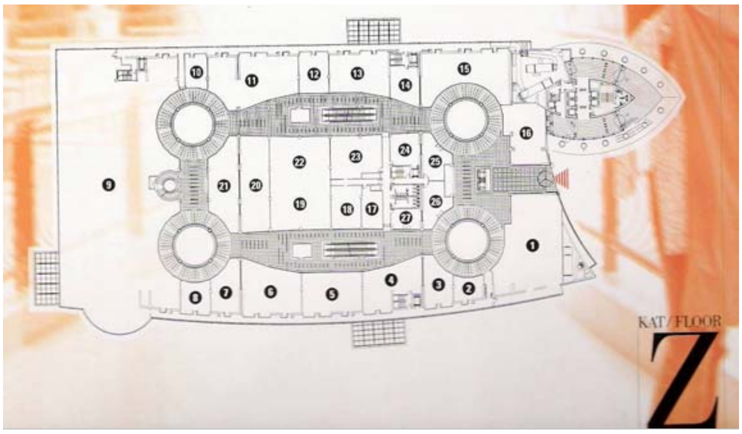
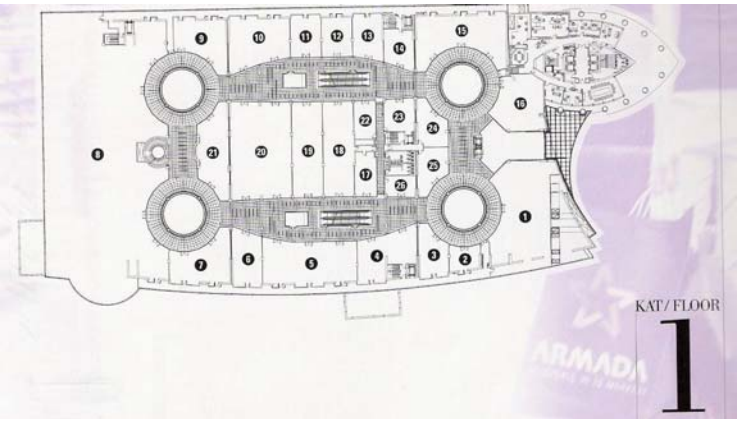


Figure C.3. Plan of Floor 0



,

Figrue C.4. Plan of Floor 1

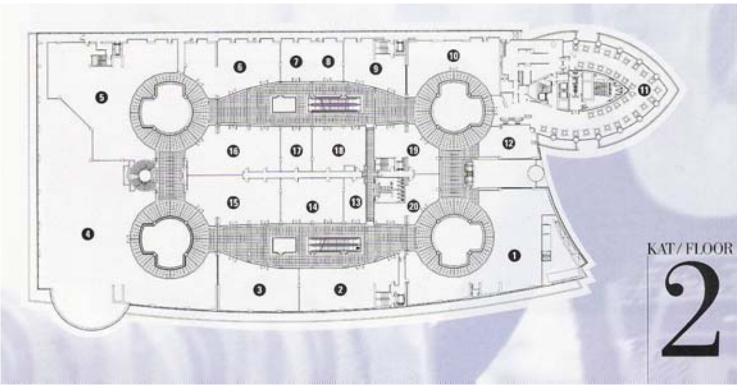


Figure C.5. Plan of Floor 2

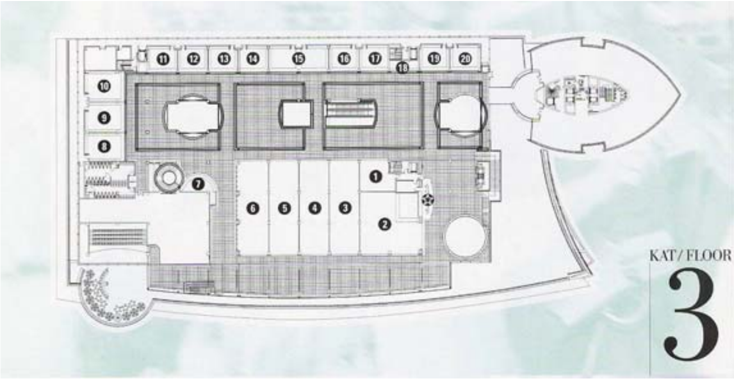


Figure C.6. Plan of Floor 3

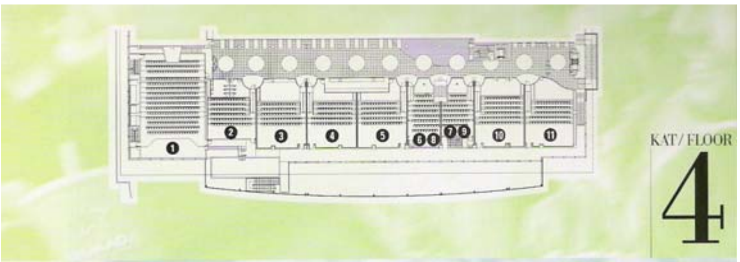


Figure C.7. Plan of Mezzanine

APPENDIX D

SHOP LIST IN 2003 AND 2008 OF ARMADA SHOPPING CENTER

Table D.1. Shop List in 2003 and 2008 of Armada Shopping Center

2003	**2008**
	771
	Accesorize
	Ada Terzi
Adana Sofrası	Adana Sofrasi
Adidas	Adidas
Agatha* **	
	Adventure Republic
Altınyıldız	Altınyıldız
Ankara Dönercisi	Ankara Dönercisi
Arby's	
Aria	**Avea**
	Aqua Ütü/Philips Ütü
Armada Pharmacy	Armada Pharmacy
	Armada Lara Çiçekçilik
Cinema Armada	Cinema Armada
Atasay	Atasay
Ayyıldız	Ayyıldız
Baklavacı hacı baba	Baklavaci Hacibaba
Barbie- action man	
	Başkent Dönercisi
Batik	Batik
Benetton	Benetton
Berk	Berk Çorap
	Bernardo
Beymen	Beymen
Beymen Club	Beymen Club
Bind çikolata	Bind Çikolata
	Bilakis
Bisse	Bisse
	Bosch
Budakaltı	Budakaltı
Burger King	Burger King

Table D.1. Shop List in 2003 and 2008 of Armada Shopping Center (continued)

2003	**2008**
Cacharel	Cacharel
Çardak mantı	
Carpetiem (halı)	
Çarşı*	**Boyner**
Chicco	Chicco
Çırağan	Çirağan Et Lokantasi
Classico	
Club Safari Pet Shop	Club Safari Pet Shop
	Converse
	Daily Fresh
	Çilli
Damat tween	Damat Tween
Daniel Hechter	
Demir Ticaret (Pionerr)**	
Derimod	
Desa	Desa
Dexter	Dexter
Diamond	
Digesta Gümüş	Digesta Gümüş
Didem color	**Muhammed Ali Fotoğraf**
Diesel	Diesel
Divaresse	Divarese
Dockers	Docker's
Döneristan	
Dörtel	Dörtel
Dry center	Dry Center
Dufy	Dufy
	Egeli Tost
Ekol	Ekol
Elefanten	Elefanten
Esse (tefal)	Esse
	Ets Turizm
Eurokids	
Express Cafe	
Fabrika	Fabrika
	Façonnable
Faik Sönmez	Faik Sönmez
	Fan Fang
	Fresh Line
Gas	
Gian Franco Ferre	
Gift home	
Gima* Hypermarket	**Carrefour Hypermarket**
	Gloria Jeans Coffee's
Eye Doktor	Eye Doktor
Göz Grup	Göz Grup
Greenwich / Otap	Greenwich / Otap

Table D.1. Shop List in 2003 and 2008 of Armada Shopping Center (continued)

2003	2008
	Grena
	Guess
Güral Porselen	Güral Porselen
Güreller Prestij* **	
Harem	Harem
	Haribo
Himm's/Euro Kids	
Homestore* **	
Hotiç	Hotiç
Hüsrev	
Ikbal sucuk	
	Inglot
	Işik Mücevherat
İnci	İnci Kundura
İpekyol	İpekyol
Istikbal Hukla	
	Jeaneration
Joop!	Joop!
Joy Park	
Jumbo	Jumbo
	Kahve Dünyasi
	Kanatçi
Kanz* **	
	Karinca
Karton	Karton
Karmen	
Kekik	**Keklik**
Kekik Express Köfte	
Kent Optik	Kent Optik
Keops Mücevherat	
	KFC
Kiğılı	Kiğılı
Koton	Koton
Krc	Krc
Lacoste	Lacoste
	La Senza
Lcw Çocuk Giyim	Lcw Çocuk Giyim
Lcwaikiki	Lcwaikiki
Levi's	Levi's
Little Big	Little Big
	L'leida Mücevherat
Loco Poco	Loco Poco
Loft/Collins* **	
	Macharna
Mado	Mado
	Magicland
Marks & Spencer	Marks & Spencer

Table D.1. Shop List in 2003 and 2008 of Armada Shopping Center (continued)

Mavi Jeans	Mavi Jeans
Mc Donald’s	Mc Donald's
Minyon Kuyumculuk	Minyon Kuyumculuk
Mer D'or	Mer D'or
Miele	Miele
Miss Sixty/ Energie	Miss Sixty/Energie
	Mixer
Mocassini	Mocassini
	Mothercare
	My Fish
Nautica	Nautica
Network	Network
	Nike Kids
Nike	Nike
Nine west	Nine West
Office 1 Super Store	Office 1 Superstore
Otantik kumpir	Otantik Kumpir
Oyakbank*	**Ing Bank**
	Özsüt
Panço	Panço
Parisli Cemil Kuaför	Parisli Cemil Kuaför
Park Bravo	Park Bravo
Paşabahçe	Paşabahçe
Paul & Shark	Paul & Shark
Penti	Penti
	Philips
	Pierre Cardin
Piknik	
Polo Garage	Polo Garage
Porland* **	
Premaman	Premaman
Puma	Puma
	Que
Reebok	Reebok
Remzi Kitabevi	Remzi Kitabevi
	Replay
Roman	Roman
Roz	
	Samsonite
	Samsung
Sarar	Sarar
Siemens	
Silk & Cashmere	Silk&Cashmere
Sisley	Sisley
	Smart Pabuç Tamir Servisi
Sony	Sony
Sport & sport	

Table D.1. Shop List in 2003 and 2008 of Armada Shopping Center (continued)

Sport point	Sport Point
	Starbucks
Stefanel	Stefanel
	Sultanahmet Köftecisi
Sunum	Sunum
	Swatch
Tadım pizza	Tadim Pizza
Tefal	Tefal
	Tekin Acar
Teba	
Teknosa	Teknosa
	The Body Shop
Tiffany	Tiffany
Tommy Hilfiger	Tommy Hilfiger
Turkcell	Turkcell
Tüzün	Tüzün
U. S. Polo* **	
Uğur Saat	Uğur Saat
Uludağ Kebapçısı	Uludağ Kebapçısı
Unique art	Unique Art
Uzelli	
Vakko	Vakko
	Vestel
	Vodafone
W	W
Yuba Tobacco Shop	Yuba Tobacco Shop
Yves Rocher	Yves Rocher
Zerdali Pastanesi	Zerdali Pastanesi

APPENDIX E

ARMADA SHOPPING MALL TENANT FORM

ARMADA	PAZARLAMA KİRACI BİLGİ FORMU	Doküman No:	FR.PAZ.01
		Yayın Tarihi:	01.11.2004
		Rev. No:	0
		Rev. Tarihi:	

Proje Sahibi: Söğütözü İnşaat ve İşletme A.Ş.

Kiralama ve Yönetim Danışmanı: Alkaş Alışveriş Merkezleri Danışmanlık Ltd.

Tarih:

İlgili Kişi:

Telefon: Fax:

İşletme Alanı: Erkek G. ☐ Bayan G. ☐ Çocuk G. ☐ Fast-food ☐

Ev Tekstil ☐ Hizmet ☐ Diğer ....

web adresi: www.

FİRMA BİLGİLERİ

Firma Adı:

İştigal Konusu:

Sahibi/Ortaklar:

Kuruluş Yılı:

Merkez Adres:

İşletme Şekli: Bayi ☐ Şirket ☐

Mağaza Sayısı:

Mağaza Lokasyonları: Alışveriş Merkezi ☐

Cadde ☐

Armada A.Ş. Tarafından doldurulacaktır.

Figure E.1. Armada Shopping Mall Tenant Form

APPENDIX F

ARMADA SHOPPING MALL SERVICE ROUTES

KONUTKENT

	1. Servis	2. Servis	3.Servis	4. Servis	5. Servis
Armada Kalkış	**11:00**	**14:00**	**15:30**	**17:00**	**18.30**
Koru Sitesi	11:15	14:15	15:45	17:15	18:45
Çayyolu (PTT)	11:18	14:18	15:48	17:18	18:48
Konutkent 1	11:21	14:21	15:51	17:21	18:51
Konutkent 2	11:24	14:24	15:54	17:24	18:54
Çayyolu Sondurak	11:27	14:27	15:57	17:27	18:57
Angora Evleri	11:31	14:31	16:01	17:31	19:01
Beysukent	11:35	14:35	16:05	17:35	19:05
Ümitköy	11:40	14:40	16:10	17:40	19:10
Armada Varış	11:55	14:55	16:25	17:55	19:25

DURAKLAR

Koru Sitesi	: Mesa Taksi Durağı Önü	Çayyolu Son Durak	: Uludağ Restoran Önü
Çayyolu	: 8.Cad. PTT Karşısı	Angora Evleri	: Angora Ev. Taksi Durağı
Konutkent 1	:Konutkent İlköğretim Okulu Önü	Beysukent	13. Cad. Altınşehir Sit. Önü
Konutkent 2	: Konutkent 2 A Blok Girişi Önü	Ümitköy	9. Cad. İş Bankası önü

GÜZERGAH

Armada Kalkış - Eskişehiryolu - Koru Sit. - Çayyolu 8.Cad. - 38.Cad. - Konutkent 1 - 40.Cad. - Konutkent 2 - 37. Cad. - Çayyolu Sondurak - Angora Ev. Kavşak - Beysukent 12.Cad. - 10.Cad. - Ümitköy 8.Cad. - Armada Varış

BAHÇELİEVLER

	1. Servis	2. Servis	3.Servis	4. Servis	5. Servis	6. Servi	7. Servis
Armada Kalkış	**11:00**	**14:00**	**15:00**	**16:00**	**17:00**	**18:00**	**19:00**
Bosna Hersek Cd.	11:05	14:05	15:05	16:05	17:05	18:05	19:05
7. Cad. Bahçelievler	11:10	14:10	15:10	16:10	17:10	18:10	19:10
6. Cad. Bahçelievler	11:15	14:15	15:15	16:15	17.15	18.15	19:15
4. Cad. Emek	11:18	14:18	15.18	16:18	17:18	18:18	19:18
8. Cad. Emek	11:21	14:21	15:21	16:21	17:21	18:21	19:21
Armada Varış	11:30	14:30	15:30	16:30	17:30	18:30	19:30

DURAKLAR

Bosna Hersek Cd.	: İstihbarat Loj. Önü	Emek 4. Cad.	Maliye Bilgi İşlem Merkez Önü
7.Cad.	: BP Benzinlik Önü	Emek 8. Cad.	Yeşiltepe Blokları Önü
6. Cad.	: 38.Sok Köşesi		

GÜZERGAH

Armada Kalkış - 90. Sok. - Bahçelievler 7.Cad. - Bahçelievler 6.Cad. - Emek 4.Cad. - 71. Sok (Sola Dönüş) - Emek 8.Cad. - Eskişehiryolu - Armada Varış

ÇANKAYA

	1. Servis	2. Servis	3.Servis	4. Servis	5. Servis
Armada Kalkış	**11:00**	**14:00**	**15:30**	**17:00**	**18:30**
Atakule	11:15	14:20	15:50	17:20	18:50
Turan Güneş Blv.	11:20	14:25	15:55	17:25	18:55
TRT Genel Md.	11:25	14:32	16:02	17:32	19:02
Oran Sitesi	11:27	14:36	16:06	17:36	19:06
Atatürk Sitesi	11:30	14:40	16:10	17:40	19:10
Armada Varış	11:45	14:55	16:25	17:55	19:25

DURAKLAR

Atakule	: Sedat Simavi Sok. Köşesi	Oran Sitesi	: Oran PTT Önü
Turan Güneş Blv.	: Başkent Sitesi Önü	Atatürk Sitesi	: Selçuklu Sitesi Önü
Turan Güneş Blv.	: MSB Loj. Yaya Üst Geçidi Altı		

GÜZERGAH

Armada Kalkış - Konya Yolu - Çetin Emeç Blv. - Hoşdere - Atakule - Simon Bolivar Cad. Turan Güneş Blv. - MSB Lojmanları - TRT- Oran Sitesi - Atatürk Sitesi - Konya Yolu - Armada Varış

GOP

	1. Servis	2. Servis	3.Servis	4. Servis	5. Servis
Armada Kalkış	**11.00**	**14:00**	**15:30**	**17:00**	**18:30**
İran Cd.	11:15	14:15	15:45	17:15	18:45
Koza Sok.	11:20	14:20	15:50	17:20	18:50
Uğur Mumcu Cad.	11:25	14:25	15:55	17:25	18:55
Filistin Sok..	11:30	14:35	16:05	17:35	19:05
Kennedy Cad.	11:35	14:45	16:15	17:45	19:15
Armada Varış	11:45	15.00	16:30	18:00	19:30

DURAKLAR

İran Cad.	:	Filistin Sok.	: Petek Taksi Karşısı
Koza Sok.	: Mesa Ufuk Sitesi Önü	Kennedy Cad.	: ASO Karşısı
Uğur Mumcu Cad.	: MNG Holding Önü		

GÜZERGAH

Armada Kalkış- İnönü Blv. -İran Cad. - Çankaya Cad. - Ziya Ürrahman Cad. - Koza Sok. - Çayhane Sok- Uğur Mumcu Cad. - Kuleli Sok. - Filistin Sok. - Arjantin Cad. - Tunalı Hilmi - (Sola Dönüş) Kenndy Cad. - İnönü Blv. - Eskişehiryolu - Armada Varış

Figure F.1. Armada Shopping Mall Service Routes

CURRICULUM VITAE

PERSONAL INFORMATION

Surname, Name: Aksel Gürün, Banu

Nationality: Turkish (TC)

Date and Place of Birth: 6 April 1974 , Ankara

Phone: +90 312 217 38 86

email: akselgurun@gmail.com

EDUCATION

Degree	Institution	Year of Graduation
MS	METU Urban Design	2000
BS	METU Dept. of City and Regional Planning	1997
High School	TED Ankara College, Ankara	1992

WORK EXPERIENCE

Year	Place	Enrollment
2005 - Present	B.C TASARIM	Partner and Planner
1998 - 2005	METU Dept. of City and Regional Planning	Research Assistant

FOREIGN LANGUAGES

Advanced English

PUBLICATIONS

1. Aksel, B., (2003), “To Save City Center With Respect To Shopping Centers” in MSÜ Kentsel Tasarım Sempozyumu

2. Aksel, Gürün, B., (2005), “Alışveriş Merkezlerine Karşı Kent Merkezi” in Planlama Dergisi, 2005/1, vol. 31, pp. 63-74