

## Istanbul Chamber of Industry announced the “ICI Scores of Sustainability Trends in Industry” for the first time in Türkiye, in cooperation with Ipsos.

The Research on Sustainability Trends in Industry has been conducted by Istanbul Chamber of Industry (ICI) in cooperation with Ipsos Türkiye (Ipsos) to understand the current status and attitudes of industrial organizations in Türkiye regarding sustainability. The findings obtained from this industry-wide research, conducted for the first time in Türkiye, shape and steer ICI's future actions in the field of sustainability. The “ICI Scores of Sustainability Trends in Industry” were calculated industry-wide for the first time in Türkiye in cooperation with Istanbul Chamber of Industry & Ipsos.

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### HOW WERE ICI SCORES of SUSTAINABILITY TRENDS IN INDUSTRY CALCULATED?

The “weighted scoring” method was applied to determine the quality and scope of the scores in cooperation with ICI and Ipsos. This scientific method considers the relative significance of different factors or questions and generates a performance score based on these significance levels.

The metrics in this context were established by selecting relevant questions from the questionnaire, assigning a specific weight to each question within the overall score, and averaging the weighted data to calculate Türkiye-wide scores.



## OUTCOMES OF 2024 ICI SCORES of SUSTAINABILITY TRENDS IN INDUSTRY:

Three different performance scores were calculated under the titles of “Awareness”, “Attitude” and “Implementation”. The 2024 ICI Scores of Sustainability Trends in Industry are as follows:

### AWARENESS SCORE



### ATTITUDE SCORE



### IMPLEMENTATION SCORE



According to the results from various questions in each score group, industrial companies across Türkiye scored the highest in Awareness with a score of 48.97. These companies scored 34.27 in Attitude and 18.19 in Implementation.

The scores were calculated out of 100, and an improvement area was also identified for each performance score.

### AWARENESS SCORE



### ATTITUDE SCORE



### IMPLEMENTATION SCORE





## OUTCOMES OF 2024 ICI SUSTAINABILITY TRENDS IN INDUSTRY RESEARCH:

The outcomes of the 2024 Research on Sustainability Trends in Industry conducted by ICI in cooperation with Ipsos, to better understand the current status and attitudes of industrial organizations in Türkiye regarding sustainability, are as follows:

**OUTCOME 1:** Companies are still at the initial stage in terms of integrating sustainability into corporate strategy.

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**OUTCOME 2:** Companies present a low knowledge level about the agenda of sustainability.

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**OUTCOME 3:** Among the limited number of companies that set a sustainability target, targets related to economic sustainability stand at the heart.

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**OUTCOME 4:** Only **13 percent** of the industrial organizations in Türkiye calculate their carbon footprint.

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**OUTCOME 5:** The most important factor that affects sustainability targets and actions is “Laws and Regulations”.

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**OUTCOME 6:** Industrial companies are primarily in need of “Incentives / Funding” for sustainability implementations.

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**OUTCOME 7:** Total rate of companies that release public reports on sustainability is **6 percent**.



## OUTCOME 1

Companies are still at the initial stage in terms of integrating sustainability into corporate strategy.

22%

22% of the survey respondents state owning a “company/business”. An analysis of the titles of respondents reveals that the persons interviewed as part of the research are mostly top executives.

23%

The rate of companies with a sustainability department and manager is 23%.

74%

74% of the industrial companies that participated in the research believe that the matter of sustainability is a crucial part of the company vision.

28%

28% of the industrial companies state that they have integrated sustainability into all process of their business strategies and monitored its performance by setting SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) targets in all critical matters.

39%

While the rate of those that only follow and adapt to new legal regulations and amendments in the legislation with regard to sustainability is 32%, the rate of those that stated how they set targets by going beyond an adaptation-oriented approach in projects on specific matters, although not in all projects, is 39%.

The sustainability title that covers environmental, social, economic and governance factors in terms of companies’ achievement in today’s dynamic and global markets is critical. As part of the research, although every **3 out of 4 companies** in Türkiye mention that sustainability is a crucial part of their company vision, it would be reasonable to suggest that most of the industrial companies in Türkiye are still at an early stage in terms of integrating sustainability into their corporate strategies, considering how almost every **3 out of 10 companies** integrated sustainability into their daily work routines and set measurable targets and took actions in this respect, on a regular basis.



## OUTCOME 2

### Companies present a low knowledge level about the agenda of sustainability

The research participants were asked about their knowledge of the Paris Agreement, Türkiye's net zero emission target by 2053, the United Nations Sustainable Development Goals and the European Green Deal.

**58%**

The rate of those that stated being knowledgeable about the Paris Agreement is 58%.

**50%**

50% of the respondents indicate that they know nothing or very little about Türkiye's net zero emission target by 2053.

**42%**

The topic identified by the least number of respondents as knowledgeable is the United Nations Sustainable Development Goals, with a rate of 42%.

**32%**

32% of the research participants stated that they know nothing about the European Green Deal.

Declaration-based knowledge level on the topics in the agenda which are related to sustainability throughout Türkiye appears to be mostly low. The rate of those who answered with "Not knowledgeable" and "Slightly knowledgeable" on matters other than the Paris Agreement and Türkiye's net zero emission target by 2053 is higher than the rate of those who answered with "Moderately knowledgeable" and "Very knowledgeable".



## OUTCOME 3

Among the limited number of companies that set a sustainability target, targets related to economic sustainability stand at the heart.

# 34%

Only 34% of the industrial companies which participated in the research stated that they set a sustainability target for 2023.

# 72%

The most frequently identified sustainability aspect by industrial organizations consist of titles about “economic” sustainability. As part of the research, 72% of the industrial organizations that set sustainability targets for 2023 set targets about economic sustainability.

# 50%

50% of the companies with a sustainability target to be achieved within 2023 did not state any targets for social sustainability, whereas 37% of them did not state any for environmental sustainability.

Historical development process of the sustainable development concept demonstrates that human development policies have evolved from approaches addressing merely economic growth into approaches believing that environmental and social sustainability are essential for human development. From the point of view of companies, sustainability means achievement of targets by companies, through inclusion of economic, social and environmental risks and opportunities into their strategies, and their creation of value for all shareholders in the long term. Within this framework, the research reveals that every **7 out of 10 companies** have not set a sustainability target on any matter, whether economic, social or environmental, for 2023. **7 out of 10 companies** that set a target stated including matters of economic sustainability, 6 stated including matters of environmental sustainability, and 5 stated including social sustainability into their targets, which is a positive development towards adopting an extensive definition of sustainability, including environmental, social and economic factors. Additionally, this indicates that companies focus particularly on economic targets in the field of sustainability.



## OUTCOME 4

Only 13 percent of the industrial organizations in Türkiye calculate their carbon footprint.

88%

Among the environmental sustainability actions specified under the sustainability targets, “greener manufacturing processes” stand as the one most frequently defined as “high priority”, with a rate of approximately 88%. “Increasing recycling” comes after that with 85% and “energy efficiency” ranks third with 84%.

40%

“Biodiversity and ecosystem projects” are expressed as the lowest “high priority” (40%).

67%

While the rate of those that expressed the “circular economy and business models” step as “high priority” is 67%, the rate of those that defined “low-carbon energy consumption” as “high priority” is 56%.

13%

Only 13% of the industrial organizations in Türkiye that participated in the research noted that they calculated their carbon footprint.

96%

Among the social and economic sustainability actions listed under the sustainability targets, “occupational health and safety” by 96% and “human rights and working conditions” by 95% stand as the ones most-frequently defined as “high priority”. “Work ethics” ranks third by 93%, whereas “transparency and reporting” ranks fourth by 90%.

Every **9 out of 10 companies** included in the research do not calculate their carbon footprints. In addition, considering the upcoming 12 months, steps that will be directly effective in reducing carbon footprints, like “low-carbon energy consumption”, are defined as high-priority by relatively less companies, among the priorities for environmental sustainability. Accordingly, it appears that a more intensive work should be carried out to raise awareness of companies on combating climate change.



## OUTCOME 5

The most important factor that affects sustainability targets and actions: “Laws and Regulations”

**79%**

79% of the respondents are of the opinion that top managements of companies (Board of Directors, Company owner, general manager etc.) are responsible for achieving the sustainability targets of their companies.

**46%**

46% of the research participants state that top managements of companies only follow the agenda about sustainability and monitor some mandatory developments, such as laws, regulations, legislations, etc.

**72%**

72% of the industrial organizations in Türkiye that participated in the research expressed how “Laws and Regulations” play a big role in the steps they take towards sustainability.

As sustainability becomes a significant factor in competition, it necessitates more leadership and integration in respect of sustainability. In this context, as leaders’ commitments about sustainability gain more importance, laws and regulations stand as an effective instrument for the industrial companies in Türkiye to take action about sustainability.





## OUTCOME 6

### Industrial companies are primarily in need of “Incentives/Funding” for sustainability implementations

**62%**

62% of the industrial companies which participated in the research agree with the statement that innovative developments and innovations about sustainability contribute to the success and profitability of companies.

**56%**

56% of the companies with sustainability targets have a budget allocated to make investments for the purpose of achieving their targets.

**38%**

Within the framework of the research, industrial companies in Türkiye point that they are primarily (by 38%) in need of “Incentives/Funding” for sustainability implementations. 21% of the participants mentioned that they needed “Briefing/Training” support in the first place.

**12%**

“Energy efficiency assessment” was listed as the primary need by 12% of the participants, “Consultancy” by 13% and “Capacity building” by 10%.

**16%**

In the financing of sustainability projects, the rate of companies that stated having benefited from sustainable finance products and services is 16%.

Among the sustainable finance implementations, financial supports needed in areas like combating climate change, transition to low-carbon economy and green transition become widespread with each passing day. Although the companies included in the research cite “Incentives / Financing support” as their primary need, the rate of companies that use sustainable finance products and services for the financing of sustainability projects throughout Türkiye is limited to approximately **2 out of 10 companies.**



## OUTCOME 7

Total rate of companies that release public reports on sustainability is 6 percent

**20%**

Among the companies that participated in the research, 20% indicate that they have defined processes regarding sustainability in their companies, which will ensure identifying, positioning and including priority shareholders in the process.

**42%**

Among the companies that mentioned having defined processes, 42% express that processes are carried out in the form of "ensuring regular and mutual information flow and integrating demands and expectations into business strategy".

**6%**

The rate of companies that declare releasing public reports on sustainability is 6%.

**32%**

The rate of companies that consider performing a detailed self-assessment study about sustainability at their companies within the following 12 months is 32%.

According to the research findings, sustainability performance - which is a significant stage in respect of the sustainability approach - is believed to consist of steps that are required to be taken for a transparent sharing with shareholders, given the statement of a limited number of companies indicating that they released a public report about sustainability.



## RESEARCH DETAILS:

Sample: The research targeted industrial organizations in Türkiye, taking into account 10 sector groups including 55 professional committees of ICI.

According to February 2022 data from the Social Security Institution (SSI), there are 264,622 organizations in Türkiye, across 20 industry branches under 10 main sector groups. The list of organizations was provided by Ipsos through Turkish Statistical Institute (TURKSTAT), and the list of members was conveyed by ICI for the province of Istanbul.

The sample size was determined as 620 (4.0% margin of error), with 717 surveys successfully completed.

MAIN SECTOR GROUP THROUGHOUT TR	NUMBER OF ESTABLISHMENTS IN TR	TARGETED SAMPLE	COMPLETED SURVEYS
1. Apparel	40.114	81	81
2. Machine Parts, Metal Goods	54.498	109	134
3. Chemicals, Plastics and Rubber Products	21.734	44	77
4. Textiles	19.584	39	68
5. Forest, Paper Products, Furniture and Printing	51.971	97	91
6. Electrical Equipment and Electronic Products	10.473	50	59
7. Food Products	47.777	96	88
8. Metals	7.195	33	43
9. Mining, Stone and Soil Products	6.392	41	48
10. Land Vehicles, Sea Vessels and Supply-Industries	4.884	30	28
<b>TOTAL</b>	<b>264.622</b>	<b>620</b>	<b>717</b>

\*For the sector-based results to be statistically significant (minimum 30 as basis), the rate of Metals, Mining, Stone and Soil Products and Land Vehicles, Sea Vessels and Supply-Industries sector companies was kept high in comparison to the sum within the sample. A quota was observed on the basis of ICI's sectoral distribution of 10 specifically for the province of Istanbul.

\*As numerically more or less successful surveys were achieved in certain quotas, collected data have been weighted at the end of the field, on the basis of quotas. In the weighting process, Rim Weighting Efficiency was calculated as 96.7%.



As part of the research, distribution of the companies within the NUTS1 12 Region was taken into consideration and the surveys were conducted within the framework of established quotas. Accordingly, approximately 37 percent of the companies included in the research are based in Istanbul.

<b>NUTS1 12 REGIONS</b>	<b>COMPLETED</b>
Mediterranean	64
Western Anatolia	82
Western Black Sea	32
Western Marmara	33
Eastern Black Sea	11
Eastern Marmara	75
Aegean	79
Southeastern Anatolia	32
Istanbul	265
Northeastern Anatolia	5
Central Anatolia	24
Middle Eastern Anatolia	15
<b>TOTAL</b>	<b>717</b>

While 84 percent of the companies included in the research that also collected data on business size has 1-49 employees, 14 percent has 50-249 employees and 2 percent has 250 and more employees.

<b>BUSINESS SIZE</b>	<b>COMPLETED</b>
Between 1-49	599
Between 50-249	100
250 and More	18
<b>TOTAL</b>	<b>717</b>

Methodology: Surveys were conducted with decision-makers of the companies using hybrid methods (CATI and CAWI) between 4 January 2024 and 15 March 2024.

<b>METHODOLOGY</b>	<b>COMPLETED</b>
CATI	609
CAWI	108
<b>TOTAL</b>	<b>717</b>

The quantitative questionnaire form generated by ICI and enriched by Ipsos is prepared in such length to take nearly 20 minutes. The following titles are addressed in the quantitative research:

- Knowledge levels of organizations on sustainability
- Current sustainability implementations and targets at organizations
- Sustainability implementations and targets planned for the future at organizations
- Challenges in sustainability implementations and regarding the legislation
- Supports expected by organizations in their sustainability business plans



## About Istanbul Chamber of Industry

Since the day of its foundation in 1952, Istanbul Chamber of Industry (ICI) has been continuing its operations with the strength it gets from the contributions of its members to Turkish economy as the biggest chamber of industry in Türkiye and also one of the strongest representatives of the Turkish industry. The share of the added value generated by ICI members within the Turkish industrial sector is over 33% and ICI members perform approximately 30% of the Turkish industrial sector.

Istanbul Chamber of Industry provides innovative services to its members, thus promoting sustainable development of our industry and contributing to the improvement of competitive power. To this end, ICI develops and makes available for the use of our industrialists new projects and services with national and international partners on vital subjects for our industry, such as innovations, technology development, university-industry cooperation, vocational trainings, international relations, environment and energy.

Possessing the most extensive knowledge about Istanbul industry, ICI guides our industrialists through the economic researches it carries out and the data it compiles, on the one hand, and contributes to the shaping of economic and industrial policies, on the other hand.

## About Ipsos Türkiye

Ipsos Türkiye continues operating as a part of Ipsos, one of the leading research companies in the world, serving more than 5,000 customers in 90 countries. Ipsos Türkiye is a market research company providing modelling and consultancy services through advertising, customer and employee satisfaction, marketing, media and public researches. With its almost 500 employees, it holds the leading position in Türkiye.

Defining itself as the home of passionate researchers and researches, Ipsos is the organization that has the highest number of researchers in our country, Türkiye, after TURKSTAT. The company's experienced researchers and advanced research tools enable the company to generate high-quality solutions in the entire process, from the initial creation stage to the brand / service / product development stages. Ipsos works as a solution partner with its customers in the fields of fast-moving consumption, retail trade, durable consumption, health, technology, finance, automotive, media, tourism and many others.

Holder of ISO 9001:2015 and Trustworthy Research Certificate (GAB), Ipsos carries out its works within the framework of these quality standards.

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