Discussion
The Survival of Export Links for Türkiye
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Summary I

- The paper studies the duration of Turkish manufacturing export links using micro-level **firm–product–destination (FPD)** customs data, 2009–2021.

- FPDs allow a more granular view than firm-level survival, capturing specific product–market relationships.

- After removing left-censored spells, the analysis focuses on the determinants of survival using life-table methods and discrete-time logit hazard models.

Summary II

- Methodologically, the paper applies standard tools from survival analysis:
    - Non-parametric **life-table estimator** to compute survival probabilities over time.

    - **Discrete-time hazard models** using random-effects logit:

    $$h_{ik} = P(T_i < t_{k+1} \mid T_i \geq t_k, X_{ik}) = \frac{\exp(\alpha_k + X_{ik}\beta)}{1 + \exp(\alpha_k + X_{ik}\beta)}$$

    - Coefficients are interpreted through the **hazard ratio**:

    $$HR = e^{\beta} \quad (> 1 \text{ increases exit risk; } < 1 \text{ improves survival})$$

- Censoring issues are addressed by dropping left-censored spells and using robustness checks for multiple spells.

Summary III

- **Key findings:**
    - ▷ Only **37%** of FPDs survive one additional year.

    - ▷ Surviving FPDs represent **72%** of export value.

    - ▷ Past experience (product, destination, import activity) increases survival.

    - ▷ Higher destination GDP, higher initial export value, and more peers exporting the same product–destination reduce the hazard of exit.

- Export growth is driven mainly by the **intensive margin**, despite substantial experimentation in new products and destinations.

- Overall patterns match international evidence: export relationships tend to be short-lived, especially in middle-income economies.

Comments I

This is a very promising paper.

- ▷ The dataset is exceptionally rich and rarely accessible, making the study highly valuable.

- ▷ The FPD-level approach opens the door to analyses with substantial potential for advancing our understanding of export dynamics.

Comments II

1⟩ **By construction, FPD links are shorter-lived than FP links.**
   ▷ What is the correct benchmark to assess the "true" duration of a product-level export relationship?

2⟩ **Causal identification issues.**
   ▷ Strong self-selection into exporting.

   ▷ Peer effects may be overstated (common demand shocks at destination).

   ▷ The sample period includes major shocks (wars, devaluations, geopolitical events).

Comments III

3) **Entry into new markets reflects experimentation and demand discovery.**
   - ▷ Can you quantify the *payoff* of a successful product–destination match?

4) **Experimentation in new markets resembles an investment decision.**
   - ▷ Likely linked to firms' financial capacity and liquidity constraints.
   - ▷ A heterogeneity analysis by firm characteristics would add value.
   - ▷ Exploit balance-sheet data or match customs data with VAT administrative records.
   - ▷ Production network relationships