

2018

TURKEY

By Onur Bakir

Socio-economic developments

Industrial relations

Forecasts

Annual Review

of Labour Relations and Social Dialogue

State policies

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- “State of emergency” and “referendum” were the key words for 2017. Turkey was under a state of emergency throughout the whole year and hence democracy was at stake.
- The highly controversial Constitutional referendum¹ that changed the government system from a parliamentary one to a presidential one in which the president is granted super-powers was held under the conditions of the state of emergency that suspended basic democratic rights and principles.
- The political crisis that started after the failed coup attempt in 2015 has been accompanied by an approaching economic crisis.
- Turkey was the second most rapidly growing economy among OECD countries in 2017 with a growth rate of 7.4 per cent. However in 2017, while the Turkish economy achieved considerable growth, the structural and conjunctural problems of the economy have also grown substantially.
- Despite the high rate of growth other indicators such as inflation, import/export ratio, foreign debt, employment/unemployment rates and the devaluation of the Turkish lira (TL) against the Euro and dollar have raised concerns about the sustainability of the economy and a possible crisis.
- In 2017, the labour market was mainly regulated through the state of emergency statutory decrees issued by the Council of Ministers and the parliament and social dialogue mechanisms were bypassed.
- In addition to 75,000 dismissed public officers in 2016, 28,286 public officials were dismissed by seven different statutory decrees in 2017.
- While half of the subcontracted workers in the public institutions were transferred to public employment, another half were deprived of the right to “cadre” despite the promises given before the elections.
- Although the union membership rate and collective agreement coverage rate slightly increased in 2017, still about 90 percent of the workers are not represented by trade unions or covered by a collective agreement.
- In 2017, the state of emergency was used as an excuse to violate trade union rights and freedoms, to intervene in industrial actions and to prohibit strikes.


¹ For details please see the report of the Organization for Security and Co-Operation in Europe, [<https://www.osce.org/odihr/elections/turkey/324816>].



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Socio-economic developments

Indicator	Source	2015	2016	2017
Growth Rate	Turkstat	4 %	2.9 %	7.4 %
Growth Rate	OECD	6.1 %	3.2 %	7.4 %
Inflation (consumers)	Turkstat	8.8 %	8.5 %	11.9 %
Inflation (producers)	Turkstat	5.7 %	9.9 %	15.5 %
FDI (billion USD)	Min. of Commerce	18	13	10.8
Imports (billion USD)	Turkstat	143.8	142.5	157
Exports (billion USD)	Turkstat	207.2	198.6	233.8
Exports / Import	Turkstat	69.4	71.8	67.1
Foreign Debt (billion USD)	Turkstat	399.5	408.2	453.2
Foreign Debt / National Income	Turkstat	46.3	47.3	53.3
Currency (Annual Average, 1 USD=)	Central Bank	2.72TL	3.02TL	3.64TL
Budget Deficit (billion USD)	Min. of Finance	7.4	9.8	12.9
Employment Rate (15-64)	Turkstat	50.2 %	50.6 %	51.5 %
Unemployment Rate (15-64)	Turkstat	10.5 %	11.1 %	11.1 %
Female Unemployment Rate (15-64)	Turkstat	12.9 %	13.9 %	14.2 %
Youth Unemployment Rate (15-24)	Turkstat	18.5 %	19.6 %	20.8 %
NEET Rate (20-24)	OECD	33.3 %	32.9	32.9
Hourly Minimum Wage ²	OECD	5.06	6.07	5.89
Gross Average Daily Earning (USD)	Soci Sec. Ins.	26.66	27.70	26.40
Union Membership Rate (%)	Min. of Labour	11.2	11.5	12
Collective Bargaining Coverage Rate (%)	OECD	6.7	7.0	N.A.
Gini-coefficient	Turkstat	38.6	39.6	40

With a growth rate of 7.4 per cent, Turkey had the second most rapidly growing economy among OECD countries in 2017. Considering the fact that the OECD average was 2.5³ and the EU-28 average was 2.4⁴, Turkey almost tripled many economies in terms of economic growth.

At first glance, it might look like a remarkable economic success. However, when the growth rate is analysed together with the other main indicators, one might conclude that not only the economy of Turkey but also problems of the economy itself had grown in 2017.

² In 2017 constant prices at 2017 USD PPPs)

³ <https://stats.oecd.org/index.aspx?queryid=60703>

⁴ <https://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tec00115&plugin=1>

In other words, it is not possible to talk about healthy and sustainable economic growth due to the other indicators pointing to an approaching economic crisis as follows:

- Inflation went out of control, especially in terms of producer prices.
- Foreign direct investment – which is crucial for the Turkish economy that is in need of a flow of hot money – kept decreasing dramatically.
- Foreign debt kept increasing drastically and the rate of foreign debt to national income exceeded 50 percent.
- The foreign trade deficit increased and the export/import ratio decreased.
- The budget deficit kept increasing and economic growth did not help to construct a stronger and more sustainable level of public finance.
- The economic growth was not accompanied by employment growth at the same level; despite the 7.4 percent economic growth, the employment rate had only a slight increase, bringing up the dilemma of “growth without employment”.
- Economic growth at record level did not contribute to the fight against unemployment; from 2016 to 2017 the unemployment rate did not change and remained at a considerably high level of 11.1 percent.
- New employment opportunities were predominantly taken by middle-aged and elder males, which in turn resulted in increasing rates of youth and female unemployment and high levels of the NEET rate: “neither in education, nor in employment”.
- The main producers of the economic growth, namely the workers, did not get their share from the economic growth; the growth was not reflected in real wages or improved working conditions.

- Despite the slight increase in both union membership and collective bargaining coverage rates, almost 90 percent of the workers were not represented by a union or covered by a collective agreement.
- Economic growth did not contribute to a transition to a fairer economy as the increasing Gini-coefficient indicates.
- Most importantly, the fluctuations in currency reached an alarming level. In 2017 the Turkish lira depreciated against the USD by 20 per cent.

Despite all efforts and interventions by the state, the currency was not stabilized, especially in the last quarter of 2017 when the USD had many peaks around the level of “1 USD = 4 TL”. In an economy that has a high amount of foreign debt and is heavily dependent on foreign investments and import, the rapidly depreciating currency might trigger the dynamics of an economic crisis and push the economy in a vicious circle. Almost all indicators of the Turkish economy were signalling such a tendency in 2017 and many economists, academics and opposition party representatives repeatedly pointed out such a danger. However the JDP ignored all warnings and kept ruling Turkey in the way it wished under the conditions of a state of emergency.

At the end of 2017, the inevitable result was just behind the door...

State policies

“The state of emergency declared after the putsch on July 15, 2016 shaped the political context of the government policies concerning industrial and employment relations”.⁵

Balaban’s above-quoted comment on 2016 is perfectly valid for 2017 as well. The JDP government used the state of emergency as a tool and the coup attempt as an excuse to restructure working life throughout 2017.

The legal framework was mainly set by statutory decrees, though in an unconstitutional way. According to the

repealed⁶ 121st article of the Constitution “decrees having the force of law” may be issued “on matters necessitated by the state of emergency” and they shall be in effect until the end of the state of emergency. However the JDP government issued numerous statutory decrees in 2017 on matters not necessitated by the state of emergency and implementation of which is not limited with the duration of the state of emergency. Besides, the Constitutional rule on approval by the parliament was not followed properly. In other words, Constitutional rules were repeatedly violated.⁷

⁵ Utku Balaban, 2017, “Annual Review 2017 of Labour Relations and Social Dialogue Turkey”, Friedrich Ebert Stiftung, p. 6.

⁶ The article was repealed by the Constitutional Amendment that was put in practice in 2018. Therefore abovementioned Constitutional Rule was in effect in 2017.

⁷ For detailed information please see: Kerem Altıparmak, 27 July 2016, “This is Not a State of Emergency Decree Law”, [<https://m.bianet.org/english/politics/177209-this-is-not-a-state-of-emergency-decree-law>] and Yaman Akdeniz and Kerem Altıparmak, 2018, “Turkey: Freedom Of Expression In Jeopardy Violations Of The Rights Of Authors, Publishers And Academics Under The State Of Emergency”, [https://www.englishpen.org/wp-content/uploads/2018/03/Turkey_Freedom_of_Expression_in_Jeopardy_ENG.pdf].

Dismissal of Public Employees

While more than 75,000 public officials were dismissed by statutory decrees without any prior investigation or disciplinary procedure in 2016 on the ground of accusation that they were affiliated or related with terrorist organizations, another 28,286 public officials were dismissed by seven different statutory decrees in the same way with the same excuse in 2017.⁸ These dismissals were neither in line with the Constitution nor the Law on Public Employees and related legislation. In addition, a considerable number of these public employees were KESK members who were dismissed in reference to their union activities or political position.

By the statutory decree No. 685 dated January, 23 2017 the State of Emergency Inquiry Commission⁹ was established and regulated as the single appeal mechanism for the dismissed public employees. In conclusion, dismissed public officials were deprived of their right to apply to administrative courts for reinstatement despite the fact that it is a constitutional right which is regulated and protected also by the Law on Public Employees. In other words roughly a hundred thousand public employees were dismissed and they were not allowed to apply to courts and were left to the discretion of an administrative commission.

Transfer of Subcontracted Workers to Public Employment

Despite the Constitutional rule, one of the most important legal regulations of the recent years that changes the legal status of about 1 million subcontracted workers in the public institutions was introduced by a statutory decree as well.

In the AKP era, employing workers through subcontracted firms became the major form of employment in public institutions: while the number of subcontracted workers exceeded 1 million, the number of public workers decreased to 350,000. Subcontracted workers had been asking for transfers to public employment (which is referred as provision of public workers' "cadres") but their demands had been denied until 2015 when the JDP could not get a majority of votes in the 7 June 2015 elections and had to deliver some promises for different sections of the society before the elections on October 1 2015. One of these promises was providing subcontracted workers with cadre status, in other words, transferring them to public employment. However, the JDP did not keep its promise until the end of 2017, which was not surprising considering

the fact that the JDP needed leverage before the upcoming elections of 2018.

In conclusion, statutory decree No. 696 was promulgated in the Official Gazette dated 27 December 2017. Despite the JDP's promises that all subcontracted workers would be covered by the law and they would all be transferred to public employment without any condition, the statutory decree did not only exclude hundreds of thousands of workers but it also introduced numerous conditions for the workers covered by the regulation. Most importantly subcontracted workers employed in the local public administrations were totally deprived of right to cadre status since the statutory decree regulated that they would not be transferred to local administrations as public workers with cadre but they would be transferred to the companies of the local administrations. As a result, about 500 subcontracted workers were deprived of right to cadre and enjoying the full rights of public workers. In addition, more than 10,000 workers in the central public administrations were also excluded due to the requirements introduced by the statutory decree despite the promises of the government they were either be kept working for subcontracted companies or become unemployed.¹⁰

In addition, the workers who would be transferred to the central public administrations as public workers and to companies of the local public administrations were also deprived of basic workers' and union rights since according to the statutory decree: 1) they would not get equal pay and have equal rights with public workers, 2) their salaries, rights and working conditions were subjected to two different collective agreements (one for central, one for local administrations) to be concluded by the High Arbitration Council, and 3) they can be trade union members but they cannot be covered by the collective agreements of public workers until 2020. In other words their right to a collective agreement was suspended for 2.5 years.

In short, although their legal status has changed and they have become either workers of central public administrations or the companies of local public administrations, the salaries and rights of the workers remained more or less same.

⁸ 1,564 dismissed public officers were reinstated by the same statutory decrees.

⁹ For detailed information please see: Kerem Altıparmak, 2017, "Is The State Of Emergency Inquiry Commission, Established By Emergency Decree 685, An Effective Remedy?", Human Rights Joint Platform, [http://www.rightsagenda.org/attachments/827_IS%20THE%20STATE%20OF%20EMERGENCY%20INQUIRY%20COMMISSION.pdf].

¹⁰ Since giving detailed information on requirements and conditions imposed by the statutory decree would take many pages, they are not covered in this report. For detailed information please see: Onur Bakır, 2018, "Taşeron İşçiler ve Kadro Mücadelesi", [http://teoriveylem.net/2018/03/taseron-isciler-khk-ve-kadro-mucadelesi/].

Compulsory Mediation in Labour Disputes

The new Law on Labour Courts No. 7036 was promulgated on the Official Gazette dated 12 October 2017 and replaced the previous law. According to the new law that would be put into effect in 2018: 1) in cases of individual labour disputes (dismissal, unpaid wages, violated rights etc.) application to a mediator is compulsory in order to be able to apply to labour courts; in other words workers cannot file a lawsuit before a labour court if they do not apply to a mediator first, 2) following application of the worker, the parties (employer and worker) meet together with the mediator; if they reach an agreement the dispute is settled, if they do not worker has the right to file a lawsuit, 3) if an agreement is achieved between parties, the worker cannot apply to court on the agreed issues even if he/she receives less than what he/she is legally entitled to.

The main justifications for the law were decreasing the number of labour lawsuits and enabling workers to access to their legal rights/payments in a shorter period of time compared to lawsuits that might take 1-2 years. However, the law has been harshly criticized since: 1) it limited constitutional right to apply to courts (Article No: 36), 2) it would result in bargaining over workers legal rights and what is due since employers would be offering lesser amounts than what is actually due to workers, 3) workers would be promoted to and even pushed to accept lesser amounts in order to access their legal rights in a shorter period of time.¹¹

Anti-labour legal amendments

The abovementioned Law No. 7036 did not only impose compulsory mediation but it also introduced anti-labour regulations as follows: 1) the prescription periods for filing lawsuits for severance pay, notice pay, discrimination compensation and bad faith compensation have been decreased from 10 years to five years, 2) in cases of lawsuits for reinstatement, job security compensation will be calculated according to the date of termination of the contract instead of the date of the court decree which was the former rule, 3) in cases of termination of an employment contract, a workers' right to file a complaint to the Ministry of Labour and Social Security for their unpaid legal dues (salaries, overtime payments, etc.) has been repealed.

Automatic (compulsory) private pension system

As Balaban noted,¹² a private pension system had become mandatory with the ratification of a new law in 2016 and workers and public employees under the age of 45 have been enrolled in the system according to the calendar introduced by the law. In 2017, around 8 million workers have been enrolled in the system. However the private pension system which is referred as "automatic" by the

government but as "compulsory" for trade unions did not work as it was supposed to. By the end of 2017, almost 60 per cent of the workers have left the system.

Employment policies

As mentioned earlier, while the employment rate increased by 0.9 percentage points in 2017 (from 50.6 per cent to 51.5 per cent), the unemployment rate did not change at all (11.1 per cent) which can be attributed to the fact that growth of employment was not enough to reduce unemployment. Besides, according to the DISK's report on unemployment¹³, the broadly defined unemployment rate increased to 18.3 percent (6,203,000 unemployed people). It is also worth mentioning that almost half of the 1 million new employment achieved in 2017 was composed of unregistered employment,¹⁴ which raises questions about the quality of employment growth. In other words, the National Employment Campaign carried out by the government neither provided a solution to high unemployment nor created quality jobs. In addition, a considerable part of the new employment was achieved through the "Public Workfare Program" (at least 200,000 trainees worked in public works such as cleaning) and the "Work Based Training Program" (297,255 trainees worked for several companies for a certain period of time)¹⁵ carried out by the Turkish Employment Agency and financed by the Unemployment Fund. These programs based on temporary employment neither contributed in advancement of quality, permanent employment nor provided a solution to unemployment but they were used as a tool to hide unemployment and transfer sources of the Unemployment Fund to employers. Finally it should be noted that the temporary agency work which had been introduced in 2016 did not have any effect either on advancing registered employment or on promoting new employment opportunities.

Occupational health and safety

The disaster in occupational health and safety continued in 2017. According to the statistics of the Social Security Institution 3,987 workers were permanently disabled and 1,663 workers were killed in 359,653 work accidents (which is the highest number in Turkey's history) in 2017. However the real numbers are much higher due to the fact that official statistics do not include work accidents of unregistered workers and work accidents that are not declared to the Social Security Institution. Since there is not a proper system of identification of occupational diseases, it is not even possible to provide reliable data. It is also important to mention that between 2003 and 2017 32,298 workers were permanently disabled and 19,470 workers were killed in 359,653 work accidents.¹⁶

¹¹ For detailed information please see: Murat Özveri, 2017, "İş Mahkemeleri Kanunu Zorunlu Arabuluculuk ve Sineği Sağır Etmek", Güncel Hukuk, 167, pp. 16-20.

¹² Utku Balaban, 2017, "Annual Review 2017 of Labour Relations and Social Dialogue Turkey", Friedrich Ebert Stiftung, p. 7.

¹³ <https://disk.org.tr/2018/04/kayitdisi-patladi-disk-ar-issizlik-raporu-nisan-2018/>

¹⁴ Ibid

¹⁵ <https://www.iskur.gov.tr/kurumsal/istatistikler/>

¹⁶ http://www.sgk.gov.tr/wps/portal/sgk/tr/kurumsal/istatistik/sgk_istatistik_yilliklari

Industrial Relations¹⁷

Union membership

According to the official statistics of the Ministry of Labour and Social Security¹⁸ the total number of union-member workers increased from 1,476,000 to 1,623,638 and the union membership rate increased from 11.5 per cent to 12 per cent in 2017. Considering the fact that the official statistics do not include unregistered workers, the real rate of union membership of workers was around 9.5-10 per cent when the unregistered workers are taken into account.

It is also important to mention that main drive in the rise of union membership was subcontracted workers in public administrations, the majority of whom were organized by pro-government trade unions.¹⁹ On the other hand, many organizing attempts in the private sector were obstructed by employers through dismissals, oppression, discrimination and many other different methods²⁰ and workers fighting back for their trade union rights were severely attacked by employers and security forces

who benefited a lot from the conditions of the state of emergency and the government's anti-union position.

In contrast to workers' trade unions, public employees' trade unions lost power in terms of union membership. Number of union-member public employees decreased from 1,756,934 to 1,684,323 in 2017.²¹ The state of emergency and mass dismissals of public employees played an important role in this tendency. Besides thousands of dismissals, thousands of KESK members de-affiliated with their unions in order to keep their jobs and in result KESK lost more than 50,000 members in 2017. While Türkiye Kamu-Sen lost around 25,000 members, the single confederation that had achieved growth in 2017 was Memur-Sen with more than 40,000 new members. In other words, backed and promoted by the government, Memur-Sen kept growing even under the state of emergency and got closer to 1 million in terms of membership.

Collective agreements

First of all, it is crucial to mention that the double-threshold system (1 per cent at a sectoral level and 40-50 percent at a workplace/enterprise level) and an employer's right to object to a trade unions certificate of representation are still the biggest obstacles to the right to bargain collectively. According to the official statistics of the Ministry of Labour and Social Security, compared to 2016, the total number of collective agreements, number of workers under coverage and rate of coverage increased considerably in 2017; respectively from 2,753 to 4,472, from 480,080 to 800,288 and 3.68 per cent to 5.89 per cent for two main reasons: in 2017 the collective agreements for public workers were renewed and following the legal regulation that facilitated conclusion of collective agreements for subcontracted workers in public institutions, there had been a boost in unionization among subcontracted workers since 2015, which turned into collective agreements especially in 2017.

However, since a vast majority of collective agreements are concluded for 2 years, yearly data are not properly functional for comparison purposes. Moreover, official

statistics do not include unregistered workers and public employees. In that regard, by using the method developed by Çelik and Lordoğlu,²² more reliable and realistic data can be generated. When this method is applied it is concluded that the total number of wage earners covered by a collective agreement has increased from 1,067,107 to 1,203,717 and the rate of coverage has increased from 5.8 percent to 6.3 percent. In short, an increase has been seen in collective agreement coverage, though it is still too low.

In December 2017, the collective agreement for public employees covering 2018-2019 was concluded. However, since public employees are deprived of right to strike by law, the collective bargaining procedure is not in line with the international standards set by the ILO and in cases of disagreement the final decision is given by the High Council of Arbitration in which government and public employers have the majority so it is not possible to call this agreement a real collective agreement.

¹⁷ For a detailed analysis on trade union movement in Turkey please see: Alpan Birelma, 2018, "Trade Unions in Turkey 2018", Friedrich Ebert Stiftung.

¹⁸ https://www.ailevecalisma.gov.tr/media/3302/calisma_hayati_2017.pdf

¹⁹ 76 percent of the new trade union members in 2017 joined trade unions affiliated with Hak-Is which is backed by the JDP government.

²⁰ For a comprehensive analysis on these methods: Onur Bakır ve Deniz Akdoğan, 2009, "Türkiye'de Sendikalaşma ve Özel Sektörde Sendikal Örgütlenme" *Türk-İş Dergisi*, 383, pp.88-95, Banu Uçkan and Engin Yıldırım, "Union Avoidance in Turkey: The State and Employers vs. Unions", [http://www.ilerdiratory.org/15thworldcongress/files/papers/Track_2/Thur_W5_UCKAN.pdf]

²¹ https://www.ailevecalisma.gov.tr/media/3302/calisma_hayati_2017.pdf

²² Aziz Çelik and Kuvvet Lordoğlu, 2006, "Türkiye'de Resmi Sendikalaşma İstatistiklerinin Sorunları Üzerine", *Çalışma ve Toplum*, Volume:9.

Strikes and Labour Unrest

According to the Turkish legislation, while public employees do not have right to strike, workers can enjoy the right to strike (which is referred as a “legal strike” in the law) in cases of disagreement during the course of collective bargaining conditional that all legal requirements are met and all legal rules are perfectly followed. It is worth mentioning that even in such cases, the right to strike is totally prohibited in some sectors such as healthcare and the Council of Ministers has the authority to suspend and practically end a legal strike on the grounds of national security, general health and etc.

According to the statistics of Ministry of Labour and Social Security, in 2017²³, 26 “legal” strikes covering 185

workplaces were called. However only 3,733 out of 36,534 workers employed in these workplaces participated in these strikes mainly due to the suspension of some strikes by the Council of Ministers. In other words only 3,733 workers could enjoy the right to strike in 2017. However it was not a surprise considering the fact that the state of emergency was used as an excuse to intervene in strikes as President Erdogan explicitly stated: “We now intervene in every single workplace that may go on strike thanks to the state of emergency. We say [to the workers], ‘no we don’t allow for a strike here. You cannot harm our business climate’”.²⁴

In 2017, five different strikes were suspended (prohibited)²⁵ by the Ministry of Council as follows:

Enterprise	Reason	Number of Workers	Sector
Asil Çelik	National Security	600	Metal
EMIS Group	National Security	2,200	Metal
Akbank	Damaging Economic and Financial Stability	14,000	Banking
Sisecam	National Security	6,500	Glass
Merfer Ilac	General Health	500	Medicine

Among these, suspension of the strike at Akbank (a leading bank in Turkey) deserves special attention because it was the first strike suspended with the reason of “damaging economic and financial stability”. Indeed the banking sector had been in the category of total prohibition of strikes until the Constitutional Court removed the prohibition in 2014. However the JDP government re-introduced the prohibition by a statutory decree in November, 2016 by a new reason of “damaging economic and financial security”. However, despite the state of emergency and severe oppression by the government and employers, workers and public employees conducted numerous industrial actions in 2017. According to the “Working Class Actions Report, 2017” of the Labour Studies Group:²⁶

- 1,313 actions were conducted in 2017 compared to 729 actions in 2016.
- 77,000 workers participated in 430 workplace-based actions.
- 64 per cent of these actions were press statements, 23 per cent of them were de-facto strikes and 11 per cent of them were resistances that took place for a period of time.
- In 33 per cent of these actions production was stopped by the workers.
- Almost half of these actions were targeting at developing rights and the rest were aiming at protecting current rights.
- Metal was the leading sector in actions (23%) followed by construction (10%) and local administrations (10%).
- At least 1,376 workers were dismissed due to either union membership or participating in industrial actions.

²³ https://www.ailevecalisma.gov.tr/media/3302/calisma_hayati_2017.pdf

²⁴ Utku Balaban, 2017, “Annual Review 2017 of Labour Relations and Social Dialogue Turkey”, Friedrich Ebert Stiftung, p. 10.

²⁵ The Council of Ministers may suspend a strike for 60 days. However, within these 60 days the union must reach an agreement with the employer or apply to the High Court of Arbitration. It is not allowed to restart the strike after these 60 days, which transforms suspension into a prohibition.

²⁶ https://emekcalisma.files.wordpress.com/2018/10/isci_sinifi_eylemleri_raporu_2017.pdf

Finally it is also important to note that many industrial actions and protests of workers and public employees were interrupted or attacked by the security forces on the ground of the limitations and restrictions introduced by the state of emergency. Almost all protests of dismissed public

employees were obstructed by the security forces and in many cases protesting public employees were taken under custody.²⁷ According to the report of the Labour Studies Group, at least 63 different actions and protests were either obstructed or intervened into by the security forces.²⁸

Tripartite Social Dialogue

Besides meetings of the Minimum Wage Determination Committee and the Commission of Public Employees' Collective Bargaining Committee, which should indeed be categorized under industrial relations rather than tripartite social dialogue, 2017 was a year when tripartite social dialogue had been practically suspended under the conditions of the state of emergency. In previous years, the government used to hold meetings on issues related to the labour market with the participation of trade unions and employers. Especially the Tripartite Consultation Committee used to have regular meetings especially when legislation is, or is planned, to be drafted.

In 2017, the Committee held a meeting on the issue of severance pay however no meeting was held before introduction of amendments in the labour legislation including transfer of subcontracted workers to public employment. In other words, employees and employers did not even receive drafts and had to read amendments and new regulations in the labour law after they were published in the Official Gazette. Regulation of the labour market through statutory decrees did not only violate the Constitution but it harmed tripartite social dialogue as well.

Forecasts

- Turkey was under the state of emergency throughout all 2017 and welcomed the new year of 2018 as a country ruled under state of emergency for 1.5 years. Besides, Turkey underwent a highly controversial referendum that changed the governmental system - and even the regime for some - when basic rules and principles of the democracy were suspended. In that regards, Turkey has been and – without any doubt - will be in a crisis of democracy.
- The new governmental system - a so-called Turkish type of presidential government which would be totally put into force after the first elections - grants the president with super powers, including regulating the socio-economic sphere and shaping industrial relations. It would not be surprising if such an accumulation of power results in further weakening of social dialogue and more undercutting of trade unions in decision-making processes.
- Regulation of working life and the labour market by statutory decrees issued in the state of emergency and bypassing of parliament, social dialogue mechanisms and trade unions in that regard has evolved into the rule rather than an exception. Regardless of when the state of emergency would be lifted, serious concerns are raised on continuation of that tendency considering the fact that the new governmental system and the president's authority to issue presidential decrees might provide the ground for it.
- The macroeconomic data of 2017 alarms the footsteps of an economic crisis. Despite the striking economic growth rate, almost all other indicators raise questions about the sustainability of the economy and point to an approaching economic crisis which might have serious political, economic and social outcomes.
- Especially under conditions of such a crisis, a rising rate of unemployment, worsening working conditions, falling wages, more flexibility and more violation of trade union rights seem highly possible.
- A new public employment regime is being built in Turkey. The job security of public officers has been de facto terminated by mass dismissals through statutory decrees and the rules of entrance to public employment have been changed in a way that empowers the government's say in who can be a public employee, which points to a shift from public employment with job security to a new unsecure public employment regime that is under the control of the government.
- Despite the increase in union membership and collective agreement coverage rates the structural problems of the trade union movement in Turkey and the serious problems caused by the state of emergency including more oppression of trade union activities and severe violations of trade union rights continue. As Erdogan clearly stated, the state of emergency has been used as a tool to restrict the right to strike. It is not possible to be optimistic about free enjoyment of trade union rights and freedoms in the short run.

²⁷ For a detailed analysis please see: "DISK Genel-İs Yearbook for 2016-2017", [<http://cloudsdomain.com/uploads/dosya/18964.pdf>].

²⁸ https://emekcalisma.files.wordpress.com/2018/10/isci_sinifi_eylemleri_raporu_2017.pdf

Annex - Information about:

- Social Security Coverage

Number of Insured Persons, 2015-2017

		2015	2016	2017
Wage Workers Under Article 4-1/a of Act 5510]	Insured Persons	14,802,222	15,355,158	16,369,073
	Pensioners (File)	6,441,029	6,736,070	7,023,352
	Dependents	18,930,244	19,438,157	19,572,127
	Rate of Insured/Pensioner	2.30	2.28	2.33
Self Employed According to Act 1479 and 2926) [Under Article 4-1/b of Act 5510]	Insured Persons	2,938,034	2,794,132	2,923,994
	Pensioners (File)	2,501,153	2,402,298	2,425,481
	Dependents	9,330,879	9,008,656	9,375,821
	Rate of Insured/Pensioner	1.17	1.16	1.21
Civil Servants [Under Article 4-1/c of Act 5510]	Insured Persons	3,032,971	2,982,548	2,987,396
	Pensioners (File)	1,865,983	1,913,966	1,969,889
	Dependents	6,525,051	6,486,429	6,574,441
	Rate of Insured/Pensioner	1.63	1.56	1.52

Source: www.sgk.gov.tr/wps/portal/sgk/tr/kurumsal/istatistik/sgk_istatistik_yilliklari

Social Security Coverage 2013-2017

	2013	2014	2015	2016	2017
Insured Persons	18,886,989	19,821,822	20,773,227	21,131,838	22,280,463
Pensioners- File	9,893,634	10,227,047	10,808,165	11,052,334	11,418,722
Dependents	32,939,205	33,940,086	34,786,174	34,933,242	35,522,389
Rate of insured/pensioner	1.91	1.94	1.92	1.91	1.95
Funds	367,205	377,800	386,572	392,201	406,856
Rate of insured/pensioner (Funds)	1.5	1.54	1.57	1.63	1.54
Population of Turkey	76,667,864	77,695,904	78,741,053	79,814,871	80,810,525
Social security coverage	62,789,365	65,060,709	67,330,236	68,212,484	70,363,848
Rate of insured population	82%	83.7%	85.5%	85.5%	87.1%
Rate of unregistered insured population	18%	16.3%	14.5%	14.5%	12.9%
Billed Payments	47,996	47,336	46,607	45,828	45,042
Number of registered under the General Health Insurance	12,351,352	11,385,011	10,180,009	10,189,469	9,825,269
Person who paid General Health Insurance premiums by themselves		4,043,415	2,787,922	2,679,737	1,889,260
Person whose General Health Insurance premiums were paid by the state		7,341,596	7,392,087	7,509,732	7,936,009

Source: www.sgk.gov.tr/wps/portal/sgk/tr/kurumsal/istatistik/sgk_istatistik_yilliklari

• Educational and Vocational Training²⁹

Participation in education and training by sex, age group, education attained and labour status (Population age 18 and over, %)

	Participation in formal education			Participation in non-formal education			Participation in formal or non-formal education			Participation in formal and non-formal education		
	2007	2012	2016	2007	2012	2016	2007	2012	2016	2007	2012	2016
Total	5.8	8.3	9.4	13.9	15.4	16.8	17.1	20.4	22.7	2.6	3.3	3.5
Sex												
Male	7.2	9.8	10.9	17.3	17.5	19.8	21.4	23.7	26.6	3.2	3.6	4.1
Female	4.5	6.8	8.0	10.5	13.4	13.8	13.1	17.2	18.9	2.0	3.0	2.9
Age group												
18-24	24.5	33.9	39.4	26.0	26.7	23.8	39.7	46.6	48.9	10.7	14.1	14.3
25-34	5.5	9.6	11.6	18.0	20.9	24.0	21.1	26.9	31.2	2.4	3.5	4.3
35-54	0.8	2.0	2.9	11.6	14.4	18.0	12.0	15.6	19.7	0.4	0.8	1.2
55-64	0.1	0.2	0.1	4.4	5.4	6.4	4.4	5.6	6.5	-	0.0	0.0
65+	-	0.0	-	1.2	1.4	1.5	1.2	1.4	1.5	-	0.0	-
Education Attained												
Not completed school	0.3	0.7	0.0	2.1	3.3	2.4	2.3	3.9	2.4	0.1	0.1	0.0
Primary school	0.4	0.9	0.9	6.4	8.0	8.7	6.7	8.7	9.3	0.1	0.2	0.2
Primary education and junior high school	5.8	12.4	13.5	13.8	14.4	14.6	18.1	23.2	24.6	1.5	3.6	3.4
General high school	22.3	24.7	25.4	28.8	26.2	24.7	41.2	40.9	40.0	9.9	10.1	10.1
Vocational or technical high school	15.1	17.9	21.3	27.7	26.6	27.4	35.4	36.9	40.9	7.4	7.7	7.8
Higher education	12.1	16.3	16.4	39.0	40.0	40.5	44.9	48.4	49.5	6.3	7.9	7.4
Labour Status												
Employed	5.2	7.7	9.1	20.1	21.1	27.5	23.1	26.0	32.8	2.3	2.9	3.8
Unemployed	10.3	13.1	13.5	27.6	19.2	17.7	31.5	26.6	26.1	6.4	5.8	5.1

Source: http://tuik.gov.tr/PrelstatistikTablo.do?istab_id=2024

Vocational Training Courses by the Turkish Labour Agency (İş-Kur), 2013-2017

	Number of Courses	Number of Trainees		
	Total	Male	Female	Total
2013	31,385	107,001	113,074	220,075
2014	33,064	94,951	105,819	200,770
2015	7,668	64,211	105,191	169,402
2016	5,715	41,275	77,897	119,172
2017	5,649	35,761	81,819	117,580

Source: <http://www.iskur.gov.tr/kurumsalbilgi/istatistikler.aspx#dltop> , <https://www.iskur.gov.tr/kurumsal/istatistikler/>

²⁹ Since Turkstat has not updated statistics on adult education, the available latest data are presented.

- Employment Rate

Employment Rate by Sex (%); Total Employment (Resident Population Concept - LFS)

			2010	2011	2012	2013	2014	2015	2016	2017
From 20 to 64 years	Total	European Union (28 countries)	68.6	68.6	68.4	68.4	69.2	70.1	71.1	72.1
		Turkey	50.0	52.2	52.8	53.4	53.2	53.9	54.4	55.3
	Male	European Union (28 countries)	75.1	75.0	74.6	74.3	75.0	75.9	76.9	77.9
		Turkey	72.7	75.1	75.0	75.3	75.0	75.3	75.5	76.1
	Female	European Union (28 countries)	62.1	62.2	62.4	62.6	63.5	64.3	65.3	66.4
		Turkey	28.0	29.7	30.9	31.8	31.6	32.5	33.2	34.5
From 15 to 64 years	Total	European Union (28 countries)	64.1	64.2	64.1	64.1	64.9	65.7	66.7	67.7
		Turkey	46.3	48.4	48.9	49.5	49.5	50.2	50.6	51.5
	Male	European Union (28 countries)	70.1	70.0	69.6	69.4	70.1	70.9	71.9	72.9
		Turkey	66.7	69.2	69.2	69.5	69.5	69.8	70.0	70.7
	Female	European Union (28 countries)	58.2	58.4	58.6	58.8	59.6	60.4	61.4	62.4
		Turkey	26.2	27.8	28.7	29.6	29.5	30.4	31.2	32.2

Source: <http://ec.europa.eu/eurostat/tgm/download.do?tab=table&plugin=1&language=en&pcode=tesem010> ,
http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=lfsa_ergan&lang=en

- Unemployment rate

Unemployment Rate by Sex (Ages 15-64, %)

			2010	2011	2012	2013	2014	2015	2016	2017
From 15 to 64 years	Total	European Union (28 countries)	9.7	9.8	10.6	11.0	10.4	9.6	8.7	7.8
		Turkey	10.9	9.0	8.3	8.9	10.1	10.4	11.1	11.1
	Male	European Union (28 countries)	9.7	9.7	10.6	11.0	10.3	9.5	8.5	7.6
		Turkey	10.6	8.4	7.8	8.1	9.2	9.3	9.7	9.6
	Female	European Union (28 countries)	9.6	9.8	10.6	11.0	10.5	9.6	8.9	8.0
		Turkey	11.7	10.3	9.6	10.8	12.1	12.9	13.9	14.2

Source: http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=lfsa_urgan&lang=en

- Minimum wage

Hourly Real Minimum Wages in Turkey

	2010	2011	2012	2013	2014	2015	2016	2017
In 2017 constant prices at 2017 USD PPPs	4.32	4.45	4.57	4.66	4.72	5.06	6.07	5.89
In 2017 constant prices at 2017 USD exchange rates	2.06	2.12	2.17	2.21	2.24	2.41	2.89	2.80

Source: <https://stats.oecd.org/Index.aspx?DataSetCode=RMW>

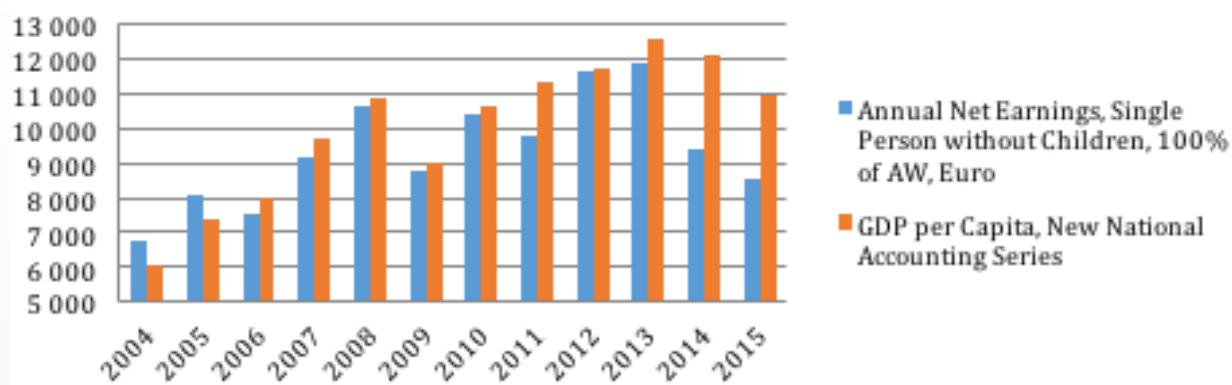
- Earnings

Annual Net Earnings, Single Person without Children, 100% of AW, Euro

	European Union (28 countries)	Turkey
2010	20,715	7,855
2011	21,110	7,028
2012	21,956	9,063
2013	22,705	8,957
2014	23,157	7,084
2015	24,183	7,678

Source: <http://ec.europa.eu/eurostat/web/labour-market/earnings/database#>
http://ec.europa.eu/eurostat/cache/metadata/en/earn_net_esms.htm

Net Earnings and GDP per Capita, USD



Source: http://ec.europa.eu/eurostat/cache/metadata/en/earn_net_esms.htm , <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD>

Gross Average Daily Earnings, USD ³⁰	
2017	26.66
2016	27.70
2015	26.40
2014	29.40
2013	30.30
2012	29.30
2011	27.80

Source: www.sgk.gov.tr/wps/portal/sgk/tr/kurumsal/istatistik/sgk_istatistik_yilliklari

• Actual Annual Working Hours

Average Usual Weekly Hours Worked on the Main Job (Total Declared, Dependent Employment)

	2010	2011	2012	2013	2014	2015	2016	2017
Turkey	50.8	50.8	50.1	49.6	49.1	48.7	47.9	47.7
OECD countries	36.7	36.7	36.7	36.7	36.8	36.8	36.8	36.6
Rank of Turkey among OECD Countries	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Number of OECD Countries	38	39	39	40	40	40	39	36

Source: <https://stats.oecd.org/Index.aspx?DataSetCode=ANHRS>

³⁰ The gross average daily earning is calculated through the amount reported by the employers to the Social Security Institution. This amount is also used to calculate social security premiums and almost a majority of the employers report less than the real wages in order to pay less social security premiums. Besides this amount does not involve side benefits which are not subject to social security premiums. These are the two reasons why this data does not reflect the real salaries.

- Normal Work/Atypical Work

	Turkey			OECD countries		
	Share of Part-Time Employment (%)		Part-Time Employees, Thousands (Weekly +30 Hours)	Share of Part-Time Employment (%)		Part-Time Employees, Thousands (Weekly +30Hours)
	Common Definition	National Definitions	Common Definition	Common Definition	National Definitions	Common Definition
2010	11.5	11.5	2,593	16.6	20.2	85,211
2011	11.7	11.8	2,832	16.8	20.3	86,789
2012	11.8	11.9	2,940	16.8	20.5	88,123
2013	12.3	12.3	3,128	17.0	20.8	89,870
2014	10.6	10.6	2,752	16.9	20.7	90,585
2015	9.9	9.9	2,630	16.8	20.5	90,991
2016	9.5	9.5	2,572	16.7	20.4	92,032
2017	9.6	9.6	2,706	16.5	20.1	92,285

	Registered Employment (Thousand)	Unregistered Employment (Thousand)	Share of Unregistered Employment (%)
2010	12,086	9,772	45
2011	13,127	10,139	44
2012	14,251	9,686	40
2013	15,222	9,379	38
2014	16,864	9,069	35
2015	17,684	8,937	34
2016	18,094	9,111	33
2017	18,614	9,575	34

Source: http://www.tuik.gov.tr/PrelstatistikTablo.do?istab_id=2258

- Migration

	In-Migration by Province, 2008-2015 (Total)	In-Migration by Statistical Region, 2008-2015 (Total)
2010-2011	2,420,181	2,045,720
2011-2012	2,317,814	1,942,874
2012-2013	2,534,279	2,122,454
2013-2014	2,681,275	2,254,607
2014-2015	2,720,438	2,287,542
2015-2016	2,619,403	2,192,826
2016-2017	2,684,820	2,256,083

Source: http://tuik.gov.tr/PrelstatistikTablo.do?istab_id=163 ,http://tuik.gov.tr/PrelstatistikTablo.do?istab_id=161 , www.tuik.gov.tr/PrelstatistikTablo.do?istab_id=1595, Note: Foreign population is not included.

- Human Development Index, 2014, 2015 and 2017³¹

Human Development Index Ranks

		Human Development Index (HDI, Value)	Life Expectancy at Birth (Years)	Expected Years of Schooling; Years	Mean Years of Schooling (Years)	Gross national income (GNI) per capita (2011 PPP \$)	GNI per Capita Rank minus HDI Rank
2017	Turkey's Rank	64	66	47	113	50	154
	Number of Countries in the List	189	189	189	189	189	189
2015	Turkey's Rank	71	65	58	111	64	140
	Number of Countries in the List	188	190	191	188	193	188
2014	Turkey's Rank	72	65	56	113	60	147
	Number of Countries in the List	188	190	189	188	190	188

Source: http://hdr.undp.org/sites/default/files/2015_statistical_annex_tables_all.xls
http://hdr.undp.org/sites/default/files/tables_1-15_6a_dashboard1_dashboard2_online_version.xlsx
<http://hdr.undp.org/en/composite/HDI>

- Gini-Coefficient

Gini Coefficient of Equivalised Disposable Income

	EU-SILC survey		TURKSTAT, Income and Living Conditions Survey
	Turkey	EU (28 countries)	Turkey
2010	43.5	30.5	38
2011	43.3	30.8	38.3
2012	42.8	30.5	38.2
2013	42.1	30.5	38.2
2014	41.2	30.9	37.9
2015	41.9	31	38.6
2016	42.6	30.8	39.6
2017	:	30.3	40

Source: http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ilc_di12
http://www.tuik.gov.tr/PrelstatistikTablo.do?istab_id=2354

³¹ Since the Human Development Index for 2016 was not available on the UN's web site, it could not be included in the table.

- Gender Pay Gap

	Average Daily Earning (USD)		Gender Pay Gap (%)
	Male	Female	
2017	27.3	25	8.4
2016	28.2	26.4	6.4
2015	27.1	24.5	9.6
2014	30.1	27.7	8
2013	30.9	28.7	7.1
2012	29.6	28.2	4.7
2011	28.0	27.2	2.9

Source: www.sgk.gov.tr/wps/portal/sgk/tr/kurumsal/istatistik/sgk_istatistik_yilliklari

- Collective Agreement Coverage

		Number of Agreements	Number of Workplaces	Number of Workers under Coverage (A)	Number of Workers (B)	A/B (%)
2014	Public	1,173	6,565	105,529	11,600,554	3.16
	Private	503	5,893	261,053		
	Total	1,676	12,458	366,582		
2015	Public	883	12,920	234,605	12,180,945	5.43
	Private	755	5,647	427,422		
	Total	1,638	18,567	662,027		
2016	Public	795	4,826	60,726	13,038,351	3.68
	Private	1,958	4,902	419,354		
	Total	2,753	9,728	480,080		
2017	Public	833	12,171	235,720	13,584,554	5.89
	Private	3,969	10,880	564,568		
	Total	4,472	23,051	800,288		

Source: <https://www.ailevecalisma.gov.tr/istatistikler/calisma-hayati-istatistikleri/resmi-istatistik-programi/calisma-hayati-istatistikleri/>

Year	Wage Earners Covered by a Collective Agreement	All Wage Earners (including unregistered workers and public employees)	Rate of Collective Agreement Coverage (%)
2010	805525	13762000	5.9
2011	802740	14876000	5.3
2012	709462	15619000	4.5
2013	776555	16353000	4.7
2014	956704	17125000	5.6
2015	1017050	17827000	5.7
2016	1067107	18377000	5.8
2017	1202717	18960000	6.3

Source: Calculated by the author by employing the method of Çelik and Lordoğlu.³²

Trade Union Density, Members/Employees (%)

Source/Year	OECD, Administrative Data	Turkish Ministry of Labour and Social Security
2013	6.31	8.88 (July, 2013)
2014	6,9	9.68 (July, 2014)
2015	8	11.21 (July, 2015)
2016	8.2	11.5 (July, 2016)
2017	8.6	12 (July, 2017)

Source: OECD data until 2013: Balaban, 2017. OECD data after 2013: <https://stats.oecd.org/Index.aspx?DataSetCode=TUD>

Turkish Ministry's data: <https://www.ailevecalisma.gov.tr/istatistikler/calisma-hayati-istatistikleri/sendikal-istatistikler/isci-sayilari-ve-sendikalarin-uye-sayilari-hakkinda-tebligler/>

³² Aziz Çelik and Kuvvet Lordoğlu, 2006, "Türkiye'de Resmi Sendikalaşma İstatistiklerinin Sorunları Üzerine", Çalışma ve Toplum, Volume:9. It is important to note that although a so-called collective agreement is concluded for public employees every two years but since it is not concluded by a real bargaining procedure and there is no right to strike, the public employees covered by this collective agreement are not included in the number of wage earners covered by a collective agreement.

- Trade Unions
 - National Trade Union Confederations

Number of Members of Workers' Labour Union Confederations (Thousands)

Original Name	Türkiye Devrimci İşçi Sendikaları Konfederasyonu (DİSK)	Türkiye İşçi Sendikaları Konfederasyonu (Türk-İş)	Independent and Others	Türkiye Hak İşçi Sendikaları Konfederasyonu (Hak-İş)	Total
Name in English	Confederation of Progressive Trade Unions of Turkey	Confederation of Turkish Trade Unions		Confederation of Turkish Real Trade Unions	
Affiliations	ITUC, ETUC, TUAC	ITUC, ETUC, TUAC, PERC, ILO		ITUC, ETUC	
2013	100,000	709,000	26,000	167,000	1,002,000
2014	108,000	770,000	27,000	192,000	1,096,000
2015	143,000	842,000	31,000	385,000	1,402,000
2016	144,000	866,000	34,000	432,000	1,476,000
2017	145,988	907,328	25,756	544,566	1,623,638

Source: Data until 2017: Balaban, 2017.

2017 Data: <https://www.ailevecalisma.gov.tr/media/1263/2017-temmuz-ay%C4%B1-istatistigi-2.pdf> (2017 June statistics)

Public Employee Union Confederations, Number of Members	2015	2016	2017
KESK (Kamu Emekçileri Sendikaları Konfederasyonu)	239,700	221,069	167,403
Türkiye Kamu-Sen (Türkiye Kamu Çalışanları Sendikaları Konfederasyonu)	447,641	420,220	395,250
Memur-Sen (Memur Sendikaları Konfederasyonu)	762,650	956,032	997,089
BASK (Bağımsız Kamu Görevlileri Sendikaları Konfederasyonu)	3,389	4,655	4,226
Birleşik Kamu-İş (Birleşik Kamu İşgörenleri Sendikaları Konfederasyonu)	50,503	63,990	64,248
Hak-Sen (Kamu Çalışanları Hak Sendikaları Konfederasyonu)	4,482	4,276	3,253
DESK (Demokratik Sendikalar Konfederasyonu)	5,769	5,499	N.A.
Tüm Memur Sen (Tüm Memur Sendikaları Konfederasyonu)	8,681	7,835	6,531
Cihan-Sen (Cihan Sendikaları Konfederasyonu)	24,299	22,104	N.A.
Anadolu-Sen (Anadolu Eksen Kamu Çalışanları Sendikaları Konfederasyonu)		781	840
Çalışan-Sen (Çalışanlar Birliği Sendikalar Konfederasyonu)			4,548
Independent Unions	42,850	50,473	40,935
Total	1,589,964	1,756,934	1,684,323

Source: <https://www.ailevecalisma.gov.tr/istatistikler/calisma-hayati-istatistikleri/sendikal-istatistikler/kamu-gorevli-leri-sendika-%C3%BCye-say%C4%B1lar%C4%B1-hakk%C4%B1nda-tebli%C4%9Fler/>

- Trade Union Federations by Branches

Branch of Activity (Sector)	Membership Rate by Years (%)					Number of Workers	Number of Union Members
	2013	2014	2015	2016	2017	2017	2017
Tree & Paper Manufacturing	7.3	7.8	8.1	8.5	8.4	240,664	20,243
Agriculture, fishing, forestry	28.6	26.1	26.0	24.4	24.4	141,643	34,504
Banking & finance	23.3	28.7	32.8	35.2	35.2	293,332	103,338
Media	4.2	4.9	6.2	5.9	6.6	92,605	6,128
Cement & glass manufacturing	15.4	16.2	20.7	19.5	19.6	177,351	34,775
Textile & garment manufacturing	8.6	9.2	9.5	9.2	8.8	1,005,855	87,997
Energy	20.2	19.9	25.1	26.8	27.3	241,872	65,975
Shipbuilding, sea transportation and warehousing	6.8	7.8	7.9	8.0	8.6	167,779	14,375
Municipal work and general services	18.6	20.3	27.4	29.4	34.5	956,541	330,326
Food manufacturing	13.0	11.7	13.1	13.5	13.3	567,610	75,629
Communication	22.5	23.0	23.8	24.1	23.7	59,697	14,189
Construction	2.2	2.5	2.3	2.6	2.9	1,828,455	52,580
Accommodation and entertainment	3.9	3.6	3.6	3.4	3.4	939,792	32,363
Mining	18.3	19.7	19.2	18.2	17.6	199,882	35,084
Metal industry	15.2	16.0	15.8	17.3	18	1,519,268	273,194
Petro-chemistry	7.9	9.8	10.5	11.3	11.2	470,494	53,080
Health and social services	2.6	3.9	6.8	9.1	11.8	350,445	41,237
Defence and security	12.3	15.4	28.0	32.2	32.9	330,903	108,891
Transportation	5.8	7.5	8.6	9.8	10.1	732,639	74,013
Commerce, education, office work and fine arts	4.1	4.3	6.0	4.9	5.1	3,264,727	165,705

Source: <https://www.ailevecalisma.gov.tr/istatistikler/calisma-hayati-istatistikleri/sendikal-istatistikler/isci-sayilari-ve-sendikalarin-uye-sayilari-hakkinda-tebligler/>, <http://disk.org.tr/2017/08/disk-ar-sendikalaasma-ve-toplu-is-sozlesmesi-raporu/>

- Employer's organisations³⁵

Employers' Associations		Sector
Associations within TİSK		
Turkish Wood Industry Employers' Association	Türkiye Ağaç Sanayii İşverenleri Sendikası	Wood
Turkish Heavy Industry and Service Sector Public Employers' Association (TÜHİS)	Türk Ağır Sanayii ve Hizmet Sektörü Kamu İşverenleri Sendikası (TÜHİS)	Public Sector
Turkish Ship Owners Employers' Association	Türk Armatörleri İşverenler Sendikası (TAİS)	Maritime Transport
Turkish Glass, Cement and Clay Industry Employers' Association	Türkiye Cam, Çimento ve Toprak Sanayii İşverenleri Sendikası	Glass
Cement Industry Employers' Association (ÇEİS)	Çimento Endüstrisi İşverenleri Sendikası	Cement
Leather Industry Employers' Association of Turkey (TÜDİS)	Türkiye Deri Sanayii İşverenleri Sendikası (TÜDİS)	Leather
Food Industry Employers' Association of Turkey (TÜGİS)	Türkiye Gıda Sanayii İşverenleri Sendikası (TÜGİS)	Food
Pharmaceutical Industry Employers' Association (İEİS)	İlaç Endüstrisi İşverenler Sendikası (İEİS)	Pharmaceuticals
Turkish Employers' Association of Construction Industries (İNTES)	Türkiye İnşaat Sanayicileri İşveren Sendikası (İNTES)	Construction
Public Enterprises Employers' Association (KAMU-İŞ)	Kamu İşletmeleri İşverenleri Sendikası (KAMU-İŞ)	Public Sector
Chemicals, Petroleum, Rubber and Plastics Industry Employers' Association of Turkey (KİPLAS)	Türkiye Kimya, Petrol, Lastik ve Plastik Sanayii İşverenleri Sendikası (KİPLAS)	Chemicals
Local Administration Public Employers' Association (MİKSEN)	Mahalli İdareler Kamu İşveren Sendikası (MİKSEN)	Local Administration
Local Administrations Employers' Association (MİS)	Mahalli İdareler İşverenleri Sendikası (MİS)	Local Administration
Turkish Employers' Association of Metal Industries (MESS)	Türkiye Metal Sanayicileri Sendikası (MESS)	Metal
Petroleum Products Employers' Association (PÜİS)	Petrol Ürünleri İşverenler Sendikası (PÜİS)	Petroleum Products
Turkish Health Industry Employers' Association (SEİS)	Türkiye Sağlık Endüstrisi İşverenleri Sendikası (SEİS)	Health Industry
Turkish Employers' Association of Cellulose, Paper and Paper Products Industries	Türkiye Selüloz, Kağıt ve Kağıt Mamulleri Sanayii İşverenleri Sendikası	Paper
Sugar Industry Employers' Association of Turkey	Türkiye Şeker Sanayii İşverenleri Sendikası	Sugar
Turkish Textile Employers' Association (TİTSİS)	Türkiye Tekstil Sanayii İşverenleri Sendikası	Textile
Clay, Ceramic, Cement and Glass Industry Employers' Association of Turkey	Türkiye Toprak, Seramik, Çimento ve Cam Sanayii İşverenleri Sendikası	Clay
Tourism Industry Employers' Association	Turizm Endüstrisi İşverenleri Sendikası	Tourism

³⁵ Following the unification of the Ministry of Labour and Social Security with the Ministry of Family and Social Policies, the websites of the ministries have also been unified. Following that unification, information on employer's organizations is no longer accessible on the new website. Therefore the information collected by Balaban (2017) from the former website of the Ministry of Labour and Social Security is presented.

Employers' Associations		Sector
Independent Associations		
Turkey's Bread Industry Employers Union	Türkiye Ekmek Sanayii İşverenleri Sendikası (TESİS)	Food
Gas Station Employers Union	T. Akaryakıt Bayileri Petrol-Gaz Şirketleri İşverenleri Sendikası (TABGİS)	Petroleum Products
Bread Industry Employers Union	Ekmek Sanayii İşverenleri Sendikası	Food
Turkey's Construction Contractors Employers Union	T. İnşaat Müteahhitleri İşverenleri Sendikası (TİMSE)	Construction
Public Sector Construction Contractors Union	Türkiye Resmi Sektör İnşaat Müteahhitleri İşverenleri Sendikası (TÜRK-İNŞA)	Construction
Textile Industry Employers Union	Türkiye Tekstil Sanayi İşverenleri Sendikası (TEKSAN-SEN)	Textile
All Bread Industry Employers Union	Tüm Ekmek Sanayii İşverenleri Sendikası	Food
Land Logistics Employers Union	Kara Nakliyecileri Nakliye Komisyoncuları Nakliye Müteahhitleri İşverenleri Sendikası (NAK-İŞ)	Logistics
Tobacco Employers Union	Türkiye Tütün İşverenleri Sendikası	Tobacco
Anatolia Metal Industry Employers Union	Anadolu Metal Sanayi İşverenleri Sendikası (AN-SEN)	Metal
Central Anatolia Bakery Employers Union	İç Anadolu Fırın İşverenleri Sendikası	Food
General Bread Industry Employers Union	Genel Ekmek Sanayi İşverenleri Sendikası	Food
Newspaper Owners Union	Gazete Sahipleri Sendikası	Journalism
Uşak Textile Employers Union	Uşak Tekstil İşverenleri Sendikası	Textile
Construction Contractors Employers Union	İnşaat Müteahhitleri İşverenleri Sendikası	Construction
Turgutlu Soil Industry Employers Union	Turgutlu Toprak Sanayi İşverenleri Sendikası (EGE-TOP-SEN)	Clay
Konya Bread Industry Employers Union	Konya Ekmek Sanayi İşverenleri Sendikası	Food
Local Government Public Employers Union	Yerel Yönetimler Kamu İşverenleri Sendikası (YEREL-SEN)	Public
Information and Communication Technologies Employers Union	Bilgi ve İletişim Teknolojileri İşverenleri Sendikası (BİTİS)	Communication
All Pharmacist Employers Union	Tüm Eczacı İşverenler Sendikası (TEİS)	Pharmaceuticals
Staff and Student Transportation Employees Union	Personel ve Öğrenci Taşıma Ulaşım Çalışanları Sendikası (ULAŞ-İŞ)	Transportation
Independent Technical Services Industry Union	Bağımsız Teknik Hizmetler Endüstrisi İşverenleri Sendikası (TEMSSEN)	Services
Private Security Employers Union	Özel Güvenlik İşverenleri Sendikası (ÖGİS)	Private Security
Service Sector Employers Union	Hizmet Sektörü İşveren Sendikası (HİZMET İŞVEREN)	Services
Family Medical Doctors Health and Social Services Employers Union	Aile Hekimleri Sağlık ve Sosyal Hizmetler İşverenler Sendikası (AİLE-SEN)	Healthcare
Education Employers' Welfare Union	Eğitim İşverenlerini Kalkındırma Sendikası (EKASEN)	Commerce, office, education and fine arts
Touristic and Recreational Businesses Employers' Union	Turistik Eğlence İşletmeleri İşveren Sendikası (TEİİS)	Accommodation and entertainment
Insurance Experts Employers Union	Sigorta Ekspertleri İşveren Sendikası (SEİS)	Banking, finance and insurance
Transportation Employers Union	Ulaşım İşverenleri Sendikası (ULİS)	General affairs
Service Employers Union	Servis İşverenleri Sendikası (SİS)	Transport
Driver Training Employers Union	Sürücü Eğitimcileri İşverenleri Sendikası (SÜRSEN)	Commerce, office, education and fine arts
Electromechanic Metal Employers Union	Elektromekanik Metal İşverenler Sendikası (EMİS)	Metal

Source: Source: Balaban, 2017.



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