

SKILLS VISION 2020

TURKEY

Working Document

November 2014



This project is funded by
the European Union

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Acknowledgments

This document has been produced as a result of the excellent teamwork and input of highly committed representatives of key policy makers and all the relevant national stakeholders, including the civil society organisations in Turkey, during a series of bilateral consultations and thematic workshops on human resources development (HRD) programming in IPA II. The Ministry of Labour and Social Security (MoLSS) coordinated the three analytical reports on education and training, employment and social inclusion that were the basis for the stakeholders' discussions.

With the support of the ETF, and in cooperation with the EU Delegation in Turkey, the Ministry of National Education (MoNE) and the MoLSS organised three workshops:

- Promoting Lifelong Learning in Turkey: Putting the LLL Strategy in Practice 2014–2018 (Antalya, 12 - 13 March 2014);
- Enhancing integrated approaches in human resources development and employment policies in Turkey (Turin, 5–6 May 2014);
- 'Long term vision, planning and delivery of skills' for the future', Ankara, 23 September 2014

The later has been jointly organised by MoLSS and ETF, with the support of the European Union Delegation to Turkey. The event took place under the auspices of the FRAME Skills for Future - the EU-IPA supported initiative in the Enlargement countries.

Building on Turkey's previous experience on using foresight as a long term forward-looking method to anticipate and support policies and action planning, the FRAME Initiative in Turkey led to an in-depth review of existing strategies and programmes on HRD and of current and future challenges on skills development.

ETF has drafted, with the support of an international expert and in consultation with the national policy leaders and stakeholders, the Skills 2020 Turkey Report. It includes a skills vision and roadmap. The report attempts to provide an answer to the following crucial questions towards Vision 2023 achievement: What actions should be prioritized in terms of skills development in the mid-term, by 2020? What are the feasible options for action, based on resources and capacities? How should the education and training system, in a lifelong and inclusive approach, be adapted in order to produce the necessary skills?

More than 130 participants – high-level officials and experts from the national authorities in charge of education, training, employment, social inclusion, science and technology, regional development, employers' associations, trade unions, training providers, research and universities, municipalities, NGOs, and representatives of EU Delegation, ETF and international experts - have engaged in a dialogue and drawn conclusions on how the skills development process can be accelerated and made more responsive to the mid to long term needs of the labour market, giving due account to economic competitiveness, lifelong learning and inclusive perspective. Three working groups focused on 'what, how and who' should support (i) an enhanced approach at regional and local level on skills anticipation and matching – the potential of regional foresights; (ii) the role of skills in promoting an inclusive growth in Turkey and (iii) better matching skills supply and demand, with focus on career guidance and counselling.

The full list of all those who took part is provided in Annex 1.

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List of abbreviations

Abbreviation	Term
ALMP	Active labour market policy
CEDEFOP	European Centre for the Development of Vocational Training
DP10	Tenth Development Plan
ECTS	European Credit Transfer and Accumulation System
ECVET	European Credit System for Vocational Education and Training
EQAVET	European Quality Assurance in Vocational Education and Training
ETF	European Training Foundation
EU	European Union
FDI	Foreign direct investment
GAP	South-eastern Anatolia Project/Güneydoğu Anadolu Projesi
GFS	Government financial statistics
HAK- İŞ	Confederation of Turkish Real Trade Unions
HRD	Human resources development
HRD OP	Human Resources Development Operational Programme
ICT	Information and communication technologies
ILO	International Labour Organization
IMF	International Monetary Fund
IPA	Instrument for Pre-Accession Assistance
ISCED	International Standard Classification of Education
İŞKUR	Turkish Employment Agency
ICT	Information and communications technology
LGBT	Lesbian, gay, bisexual and transgender
LLL	Lifelong learning
MESS	Turkish Employers' Association of Metal Industries
MIS	Management information system
MoD	Ministry of Development
MoEU	Ministry of EU Affairs
MoF	Ministry of Finance
MoFAL	Ministry of Food, Agriculture and Livestock
MoFSP	Ministry of Family and Social Policies

MoLSS	Ministry of Labour and Social Security
MoNE	Ministry of National Education
MoSIT	Ministry of Science, Industry and Technology
MTBF	Medium-term budgetary framework
MTEF	Medium-term expenditure framework
MTFP	Medium-term fiscal plan
MTP	Medium-term programme
NEET	Not in education, employment or training
NDP	National Development Plan
NES	National Employment Strategy
NGO	Non-governmental organisation
NIPAC	National IPA Coordinator
NOS	National occupational standards
NQF	National qualifications framework
NUTS	Nomenclature des Unités Territoriales Statistiques
NVIS	National vocational information system
OECD	Organisation for Economic Co-operation and Development
PBB	Performance-based budgeting
PES	Public employment service
PEVTB	Provincial Employment and Vocational Training Board
PISA	Programme for International Student Assessment
PIAAC	Programme for the International Assessment of Adult Competencies
PPP	Public Private Partnership
R&D	Research and development
RDA	Regional Development Agency
RIA	Review of Institutional Arrangements
RPL	Recognition of prior learning
S&T	Science and technology
SCST	Supreme Council for Science and Technology
SIGMA	Support for Improvement in Governance and Management
SMEs	Small and medium-sized enterprises
KOSGEB	Small and Medium Enterprises Development Organisation
SOPs	Standard Operating Procedures

SPO	State Planning Organisation
SSI (SGK)	Social Security Institution
TESK	Confederation of Turkish Tradesmen and Craftsmen
TIKA	Turkish Cooperation and Coordination Agency
TISK	Turkish Confederation of Employer Associations
TOBB	Union of Chambers and Commodity Exchanges of Turkey
TQF	Turkish Qualifications Framework
TVET	Technical and Vocational education and Training
TÜBİTAK	Scientific and Technical Research Council of Turkey
TURKAK	Turkish Accreditation Agency
TURK-IS	Confederation of Turkish Trade Unions
TURKSTAT	Turkish Statistical Institute
UMEM	Specialised Vocational Training Centres Project
UNECE	United National Economic Commission for Europe
WB	World Bank
VET	Vocational education and training
VTE	Vocational and Technical Education
VOC TEST Centres	Vocational Knowledge and Skills Testing and Certification Centres
VQA/MYK	Vocational Qualifications Authority
YÖK	Council of Higher Education

OVERVIEW

Foreword

Skills' refers to knowledge, skills and competencies, and the vision and roadmap will be developed within the broader context of HRD. The term 'HRD' covers the system of skills formation by the education and training system and the private sector within a lifelong learning perspective in the context of employment policy and social inclusion¹. The elements of the education and training system concerned are vocational education and training (VET) and higher education, within a lifelong learning perspective, as well as company-based training and training for unemployed and underemployed individuals.

There are two terms in use: 'human resource development', and 'human capital development'. The former is widely used by the European Commission, the latter more by global institutions, such as the World Bank. In this policy context, their meanings are approximately the same. According to an academic definition, human resource development is the integrated use of training, organisation, and career development efforts to improve individual, group and organisational effectiveness. Human capital is the stock of competencies, knowledge, social and personality attributes, including creativity, embodied in the ability to perform labour so as to produce economic value. It is an aggregate economic view of the human being acting within economies. It becomes clear that there is a micro-economic level (HRD as a function within organisations (public and private)), and a macro-economic or policy level).

The Instrument for Pre-Accession Assistance (IPA) offers support to countries engaged in the EU accession process. The current programming cycle is drawing to an end and IPA II, covering the period 2014–2020, is now being planned. IPA II will support the accession countries in implementing the political, institutional, legal, administrative, social and economic reforms required to bring the countries closer to EU values and to progressively align to EU rules, standards, policies and practices with a view to EU membership. This new programme will be even more strategic, efficient and better targeted, though its approach poses a challenge. IPA II aims to adopt, whenever possible, a sector-wide approach that brings together all issues relating to human resources development (HRD), employment and social cohesion under a single policy domain.

Under IPA II, HRD, the labour market and social cohesion will be treated as a single coherent sector (policy area) that requires joined-up policies across a variety of domains such as:

- Higher education
- Vocational education
- Lifelong learning (LLL)
- Social inclusion
- Job creation
- Industrial competitiveness
- Poverty reduction
- Entrepreneurship
- Skills and capabilities needed for accession to the EU

The sector-wide approach poses a challenge because it requires a wide range of policy areas that had previously moved forward more or less independently to cooperate more closely in order to develop more coherent and evidence-based policy approaches for HRD in line with the EUROPE 2020 Strategy. There is a need to integrate these fragments so that it is easier for the relevant actors to plan their response, identify their needs and acquire the resources necessary to enable them to function over time.

To help pre-accession countries to get the most out of this new approach, the European Commission has contracted the ETF to launch the FRAME – Skills for the Future initiative to help in the development of coherent policy approaches for HRD in line with the EUROPE 2020 Strategy. The FRAME initiative consists of four interrelated components that have been considered as unique interventions as they constitute the building blocks of the sector approach in HRD.

- **Component 1 – Foresight:** Implement a foresight methodology for vision building of future skills towards 2020 as an input for building coherent national HRD strategies in EU enlargement countries, including priorities and roadmap for the vision. The methodological approach has been road-tested in two of the enlargement countries (Montenegro and Serbia) and then rolled out in the other beneficiary countries.
- **Component 2 – Review of Institutional Arrangements:** Implement a methodology to review institutional arrangements in the HRD sector in relation to the capacity to achieve the country's Skills Vision 2020, and consequently to develop capacity-building responses. The methodology developed has been rolled out directly in all beneficiary countries.
- **Component 3 – Monitoring:** Develop a performance-monitoring and indicators-based system to monitor progress and strengthen accountability in implementing the sector-wide approach in HRD in line with the national strategic objectives and EUROPE 2020 goals, as well as with headline targets put forward in the South East Europe 2020 Strategy (SEE 2020).
- **Component 4 – Regional:** Facilitate a mutual learning process among pre-accession countries in the region through the organisation of regional meetings and peer-learning activities that will allow exchange of results and will pave the way for future joint activities.

Through the foresight component the ETF assists the pre-accession countries to formulate a shared Skills Vision 2020, with priorities and a roadmap. As such, the exercise is inclusive and comprehensive, as it brings together the stakeholders in charge of HRD in the country, with the objective of elaborating a shared vision built on previous work and existing national strategies.

The foresight component in Turkey has followed a different approach to the one adopted in the other pre-accession countries, since Turkey undertook a major national technology foresight exercise in 2004, leading to the development of Vision 2023. This is an all-encompassing vision for the country's transition to a knowledge economy, involving the full range of experts and stakeholders. The FRAME foresight component has thus focused on developing a skills vision and roadmap based on Vision 2023 and focusing on particular skills-related challenges emerging from Vision 2023. Skills are at the centre of the foresight component, addressing the question:

*Which skills should Turkey develop towards 2020,
and how can these skills be generated by the education and training system?*

The exercise is not intended to come up with a qualitative or quantitative list of skills, but rather to elaborate a visionary and strategic orientation for skills development, addressing and building on the goals and objectives already defined in the Turkey Vision 2023 and Roadmap.

The ETF has been working with national policy leaders and stakeholders to prioritise what should be achieved in terms of skills development in order to reach the Vision 2023 goals in the medium term,

by 2020. What are the possible, feasible and preferred options, based on resources and capacities? How should the education, training and LLL system be adapted in order to produce the necessary skills?

To date, a key rationale for foresight exercises has been to support priority setting and the selection of funding priorities for scientific and technological research, given limited resources. The Vision 2023 exercise identified other rationales, including the need for long-term strategic approaches to science and technology (S&T), lack of ownership and political support, and isolated S&T policies and the fragmentation of researchers and resources. The FRAME initiative highlights the importance of using foresight to develop joined-up long-term policy approaches in HRD and skills across government, between relevant ministries, and between government and non-governmental stakeholders, including industry and industry representative bodies, civil society groups and other non-governmental organisations (NGOs). For Turkey, this brings an added dimension to the use of foresight in national policy making beyond priority-setting, participatory and fragmentation rationales that mainly target the areas of science, technology and research. The aim is to extend this to support the coherent development and implementation of HRD and skills-related policies across government and outside government, thereby addressing the mismatch between the labour supply and industry needs. This approach of using foresight to develop more coherent approaches across sectors and across the public–private divide becomes more critical in defining long-term HRD and skills strategies for a large-scale vision such as Vision 2023, which encompasses diverse sectors and targets as well as the regional dimension. The aim is to enable the players in the different sectors to co-design and implement policies on an ongoing basis. This requires the development of an enabling framework, processes and competencies at national and regional level.

Executive Summary

As part of the European Commission's support for the preparation of the second cycle of the Instrument for Pre-Accession Assistance (IPA II), the ETF is facilitating the process in the enlargement countries through the FUTURE FRAME initiative. In Turkey there is a long tradition of technology foresight, and a nationwide exercise involving an extensive and broad range of stakeholders had already been undertaken in the country starting from 2003 to develop 'Vision 2023'. The FRAME initiative has therefore focused its efforts on defining a skills vision and roadmap, identifying key targets and priority measures for the human resources development (HRD) sector within Vision 2023. The review of institutional arrangements (RIA) and monitoring components have been approached in a similar way and the results are presented in this report. This report is intended primarily as a preparatory input to IPA II programming, and to specifically inform the Country Strategy Paper for Turkey.

The work on the foresight and RIA components started in 2013 with a number of exploratory visits by the ETF team, followed by a series of interactive workshops, in a participatory process that brought together the relevant ministries, government agencies and other bodies, along with major actors in education, training and LLL, as well as business associations, NGOs and organisations representing employers and employees, under the coordination of the Ministry of Labour and Social Security (MoLSS).

The FRAME process in Turkey has led to this shared vision:

'By 2020, Turkey is a socially cohesive, knowledge-based economy with reduced regional inequalities and a proactive, entrepreneurial workforce in which young people and women can participate fully, driving the high-tech, low-tech, and high-capability agenda. Coordinated and coherent employment, education and social cohesion policies complement the sectoral skills-related priorities at national and regional level, anticipating labour demand and providing a high-quality supply of required human resources.'

To achieve this vision, Turkey will need to address key objectives in the following priority areas:

- establishing a flexible, transparent, innovative and quality-based education system;
- improving educational attainment and skills levels;
- creating an inclusive and more effective labour market;
- building an inclusive society through effective social policies and improved social protection mechanisms.

Young people, women and those from disadvantaged groups will be given particular priority, with a strong emphasis on upscaling quantity and quality through the introduction of cost-effective innovative models and processes. The policy approaches will be contextualised by focusing on the regional and sectoral dimension of skills and HRD. To achieve these objectives by 2023, the Turkish authorities and the related institutions have defined indicators and targets.

A desk review of institutional capability to manage the policy cycle was undertaken in 2014 with an emphasis on four main functional capacities corresponding to the policy cycle phases:

1. Policy design
2. Planning and budgeting
3. Implementation
4. Monitoring and evaluation (including reporting and learning).

This entailed a mapping of capacities, based on institutional analysis. The RIA report highlights the need for investment to improve institutional capacities through an injection of resources, thereby enabling implementation of the Skills Vision 2020 recommendations and actions.

Key messages

A crucial question for policy makers and implementers and other stakeholders, especially the private sector, is how Turkey can faster tap in the latent work potential of around half of the working age population. The discussants and participants exchanged ideas and proposals on how to take more integrative and decisive actions to promote a sustainable access to employment for women, youth and groups at social risk. Skills development through wide access to quality initial and continuous education and training is a crucial for women and vulnerable groups' activation.

In spite of the positive demographic trends, some sectors are emerging or create more and more demand (e.g. financial services, health and care) while in other sectors the first signals of an ageing workforce become visible. If the Vision 2023 target on employment is to be achieved, 13 million more people should be activated and inserted on the labour market and this requires a strong increase in female employment. Access to employment is definitely a way out of poverty and social exclusion but certain conditions should be met: relevant skills upgrading; affordable accompanying social services (such as childcare); efficient cash and in-kind social support; supportive measures that are adapted to target groups' needs. A shift of how family care chores are distributed, an increased role of women in business development and management, career progression, improved health and safety at work and flexible working conditions can contribute to a sustainable activation of women on the labour market and stronger support Turkey's economic competitiveness in future.

The barriers that some vulnerable groups face, especially Roma minority, have been discussed. There is a clear need to ensure an equal access to education and social services and assistance, to design special policies and programmes adapted to target groups' specifics, to better address regional and urban-rural discrepancies, to engage the private sector/business in these efforts and further support the capacity of NGOs that are acting in the field of rights' protection and active social inclusion promotion. Better evidence on groups at social risk is crucial to this end. The quest for inclusive growth is crucial for future competitiveness of Turkey and exit from the middle income country trap and it is not one-institution job.

The problems of uneven growth of regional areas have long been a concern in Turkey for both economists and policy-makers. For many decades attempts have been made to understand the processes that shape regional economies and which perpetuate the differences between regions and major metropolitan areas, with a view to creating policies and programs to offset these differences. The Regional Development National Strategy is soon to be approved by Turkish Government. Many international, EU and Turkey studies and research indicate that there should be an attempt to develop an understanding of the local and regional dynamics of economic development in the Turkish context and the skills needed to sustain the local/regional inclusive growth. The five year plans and other policy documents, including Vision 2023, have been analysed to understand local policy thinking on mechanism and capacities to anticipate skills for local economic growth in Turkey. It is a fact that the regional policy developments within Turkey are influenced by a whole series of external concepts and policies including those of EU.

Skills foresight, anticipation and matching cannot be addressed only from a central Government perspective aiming to achieve an economic transformation that is inclusive of all sectors of society. Skills policy and implementation for growth must be based on the anticipation of international trends and the needs of local economic trends and respond from the local entrepreneurs and investors. A regional approach allows for a more hands-on and responsive engagement between local industries and training institutions/bodies than a centralised system can offer, although in a highly-centralised system this adjustment can be expected to take time. Vocational education and training (VET) has a key role in providing Skills for the regional inclusive growth.

ETF has been looking into the issues of governance of education and training and institutional

capacities needed for skills forecasting, anticipation, as well as the contribution of private sector and professional Social Network and research that support skills anticipation, development towards employment and social Inclusion for all. Good multilevel governance can enhance the role of VET as it contributes to the achievement of national development goals through cooperative and coordinated actions carried out at sub-national level and bringing on board non-stakeholder actors. In concrete terms, this calls for a strong focus on social partnership approaches in VET. Furthermore, good multilevel governance should also support systems and reforms in VET to better adapt to the current needs of the economy and labour markets; to expand democratic values in society; and to attract employers, learners, families and communities.

Participation in formal education has been increased substantially over the past decade. The new lifelong learning strategy of Turkey pays particular attention to strengthening access to lifelong learning beyond the formal education system. Learning in enterprises is particularly seen as important to promote the transition from school to work as is also good career information. The VET strategy 2014-2018 is focusing on broadening access to VET, with improved capacities of the VET system and better employment outcomes for VET graduates. The latter is also the goal for the higher education strategy 2007-2025. The Action Plan for Strengthening the Link between Education and Employment (İMEİGEP) focuses on the quality of the VET systems including delivering qualifications in the framework of the TQF, implementing curricula in compliance to occupational standards, developing information, guidance and counselling and accrediting VET institutions.

The current strategies recognise that if Turkey is to achieve its ambitious goals for further development and growth, it cannot rely only on the national policies and the formal education system to do its job. It is necessary to widen opportunities to lifelong learning, to mobilise businesses and civil society and address particularly those groups that are currently underrepresented in the labour market. The Turkey Skills Vision 2020 document that makes a link between sustainable growth and the skills Turkey needs for the future, particularly emphasises the needs for better education outcomes resulting in better employment outcomes for youth and women and addressing regional disparities. Proposals have been suggested on what can be done at the regional level in particular regarding the possibilities to involve companies more in VET (e.g. apprenticeships, and for practical placements), to ensure that women and youth be able to make the choices that can maximise their opportunities and what else can be done locally and at the regional level to improve the transition from education to work.

Information guidance and counselling and work-based learning, giving VET institutions more responsibility for the learning and employment outcomes of graduates as part of quality assurance systems and sharing good practices in employer engagement and entrepreneurial learning across institutions are further explored as possible responses at the local and regional level, but this list is not exhaustive.

Under the coordination of the Ministry of Labour and Social Security of Turkey, further efforts will be needed to follow-up the monitoring and evaluation of the proposed priorities and actions in this report, in close cooperation with the all the HRD relevant institutional stakeholders and other actors.

PART I – Skills Vision 2020: the foresight vision-building process

1. Background and context

1.1 Economic Backdrop

Turkey is an upper-middle-income country with a population of 76 million, gross domestic product (GDP) of US\$786 billion and GDP per capita of US\$10,782 in 2013. There are projections that the population will increase to 84.2 million, 93.5 million and 89.2 million by 2023, 2050 and 2075 respectively. Turkey is the 18th largest economy in the world, and the goal of its government is to propel the country into the list of the world's 10 largest economies by 2023, coinciding with the 100th anniversary of the founding of the Turkish Republic. Turkey is relatively well placed in global competitiveness rankings, at 44th (out of 148) in the 2013–2014 World Economic Forum Global Competitiveness Index (GCI). This is attributed to a vibrant business sector based on efficiency gains from the large, highly competitive domestic market and a well-developed infrastructure, particularly in terms of roads and air transport. The GCI Report highlights the country's need to enhance competitiveness 'by building up its human resources base through better primary education and healthcare and higher education and training, increasing the efficiency of the labour market, and reinforcing the efficiency and transparency of its public institutions' (World Economic Forum, 2013).

The GCI Report indicates that while the macroeconomic environment had deteriorated slightly since the previous year, with a rising fiscal deficit and inflation, Turkey's economy is faring better than those of many other European economies. Following strong growth rates of around 9% in 2010 and 2011, GDP growth slowed down to 2.2% in 2012, accompanied by a rebalancing of growth from domestic demand to foreign trade, a temporary narrowing of the current account deficit, and a decline in inflation. GDP growth increased in 2013, rising to 3.7% in the first quarter, combined with a widening of the current account deficit and a rise in consumer prices (European Commission, 2013). Total investment decreased from 21.8% of GDP in 2011 to 20.3% in 2012 owing to the slump in private investments, which fell from 18.0% of GDP in 2011 to 16.4% in 2012. Public investments continued to increase and their share of GDP rose from 3.8% in 2011 to 3.9% in 2012. In 2012 the sectors accounting for the value added as a percentage of GDP were agriculture (8.9%), industry (26.6 %) and services (64.5%).

Turkey has a functioning market economy. However, its large structural current account deficit and relatively high inflation rate highlight significant underlying imbalances. In the medium to longer term, this calls for a rebalancing of the macroeconomic policy mix and structural reforms to improve stability and the functioning of the markets for goods, services and labour, thereby strengthening international competitiveness. The key is to increase domestic savings and attract more long-term financing. A positive factor is the strong financial sector and the professionalization of banking, which has proved resilient to the effects of the global financial crisis and has remained profitable (World Bank, 2013e).

Foreign direct investment (FDI) rose from just over US\$1 billion in the early 2000s to an average of US\$13 billion in the period 2008–2012. However, gross FDI inflows to Turkey decreased to US\$12.6 billion in 2013, a drop of 4.1% compared to 2012, according to data released by the Ministry of Economy in March 2014. The energy sector has emerged as the largest recipient of foreign capital, attracting US\$2.55 billion in 2013. The EU is the main source of money flowing into Turkey, with 52% of the capital coming from EU member states. Around US\$3.7 billion of the capital inflow entered the country through operations of intermediary financial institutions. In 2013, 2 960 new foreign-funded companies were established in Turkey, down from the 3 703 companies registered in 2012. Almost 37 000 companies operating in Turkey were funded by foreign capital as of December 2013.

The economic and employment situation varies by region, with substantial regional and socioeconomic disparities reflected in the education, employment and social inclusion indicators, highlighting cohesion challenges. As more of the population moves to metropolitan and urban areas, this in turn results in a shift from traditional agriculture to the service and industrial sectors, increasing the social cohesion challenge. Turkey has made significant progress on the absolute poverty rate; however, almost one in every four households is at risk of poverty.

1.2 Overview of skills-related strategies

An analysis of national strategies that refer or relate to education, human resources and skills indicates a number of core strategic initiatives focused on national development (Table 1). Vision 2023, launched in 2006, is being implemented at national level through five-year development plans. These are elaborated at sectoral level through sectoral development plans, all of which refer to economic development, job creation and education.

Table 1: Overview of skills-related strategies

Vision 2023 Ninth Development Plan 2009–2013 Tenth Development Plan 2014–2018 Medium-term Plan 2013–2015		
Education	Employment and social cohesion	Sectoral and regional
Strategic Plan of the Ministry of National Education (2010–2014) Higher Education Strategy of Turkey (2007–2025) National Lifelong Learning Strategy (2014–2018) National VET Strategy (2014–2018) Action Plan to Strengthen the Link between Education and Employment (İMEİGEP)	National Employment Strategy (2014–2023) Youth Employment Action Plan Gender Equality Action Plan (2008–2013) Strategic Plan of the Ministry of Labour and Social Security (2009–2013) Strategic Plan of the Turkish Social Security Institution (SSI) (2010–2014) Strategic Plan of the Turkish Employment Agency/İŞKUR (2011–2015) Action Plan to Strengthen the Link between Social Assistance and Employment	Science and Technology Human Resources Strategy and Action Plan (2011–2016) Turkish Industrial Strategy (2011–2014) Export Strategy 2023 Tourism Strategy of Turkey 2023 Agriculture Strategic Plan (2010–2014) Regional Development Plans for implementing Vision 2023

It is important to note the development of action plans linking related areas of policy, including education and employment, and social assistance and employment, and to highlight the importance of developing such linkages between education, employment and social cohesion through the sectoral and regional strategies.

1.3 The current priorities and initiatives of major actors

This section provides a critical overview and streamlined analysis of the key priorities to which the main actors have committed themselves, and the related initiatives that are under way and/or planned up to 2020.

1.3.1 Overall vision and main strategies

Vision 2023

Vision 2023 elaborates a comprehensive approach targeting stable economic growth, high-quality human capital, and strategic macroeconomic, sectoral, social and regional development policies. It extends to all the key sectors in the Turkish economy, including those in which Turkey has existing or potential competitive advantage up to 2023. The Vision focuses on nine technology-relevant themes¹ and two cross-cutting themes, namely education and human resources, and the environment and sustainable development.

Vision 2023's specific targets for education, training and learning include:

- achieving a society of educated individuals:
 - ✓ increase participation rates in pre-school, basic and secondary education to 100%;
 - ✓ address problems relating to physical infrastructure so that compulsory education to 12 years can be realised;
 - ✓ promote the importance of vocational education;
 - ✓ increase the number of private universities, and improve the quality of universities;
 - ✓ increase the number of academics in universities and facilitate the transition to higher education;
- ending gender and regional disparities;
- implementing a policy of language learning;
- launching the FATİH² project (Movement for Enhancing Opportunities and Improving Technology), which will equip each classroom with an interactive whiteboard and each student with a tablet computer.

Vision 2023 includes the analysis of the provincial labour force in terms of its ability to meet labour force demand with regard to required skills, number of workers and sectors. In total, 25 Primary Transformation Programmes are under way to implement Vision 2023. A number of these are of direct and immediate relevance to education, training and LLL in the sense that they address the HRD system and its capabilities, whereas others have less relevance in the system.. Those actions of direct relevance include improving the effectiveness of the labour market, reducing the informal economy, developing the statistical information infrastructure, developing basic and occupational skills, attracting qualified human resources from abroad, and developing institutional capacity at local level.

1 Information and communication; energy and natural resources; health and pharmaceuticals; defence, aeronautics and space industries; agriculture and food; manufacturing and materials; transportation and tourism; chemicals and textiles; and construction and infrastructure.

2 Movement for Increasing Opportunities and Improving Technology, or Fatih Project (Turkish: Fırsatları Artırma ve Teknolojiyi İyileştirme Hareketi) is a project of the Turkish government that seeks to integrate state-of-the-art computer technology into Turkey's public education system. It was launched in November 2010.

Table 2: Summary of key national targets on HRD

Education	Employment	Social policies and inclusion
<p>Gross enrolment rate for pre-school enrolment (aged 4–5 years): 70% by 2018 (DP10)</p> <p>Gross enrolment rate for higher education (total): 94% by 2018 (DP10)</p> <p>Participation in LLL: increased to 15% by 2023 National Employment Strategy (NES)</p> <p>Number of students per member of academic teaching staff: 36 by 2018 (DP10)</p> <p>Number of provinces in which there are 30 or fewer students per classroom in primary education: 76 by 2018 (DP10)</p> <p>Number of provinces in which there are 30 or fewer students per classroom in secondary education: 66 by 2018 (DP10)</p> <p>Workers in the construction sector who have a vocational qualification certificate: 30% by 2023 (NES)</p>	<p>Labour force participation rate: 53.8% by 2018 (DP10)</p> <p>Female labour force participation rate: 41% by 2018 (DP10)</p> <p>Labour force participation rate for women: raised to 41% by 2023 (NES)</p> <p>Employment rate: raised to 55% by 2023 (NES)</p> <p>Job placement rate of unemployed who are registered to İŞKUR: 50% by 2018 (DP10)</p> <p>Unregistered employment rate: 30% in 2018 (DP10)</p> <p>Unemployment rate: reduced to 5% by 2023 (NES)</p> <p>Long-term unemployment rate: reduced from 24.9% in 2012 to 15% by 2023 (NES)</p> <p>Youth unemployment rate: 13% by 2018 (DP10)</p> <p>Unregistered employment rate outside agricultural sector: reduced to below 15% by 2023 (NES)</p> <p>Unregistered employment rate in agricultural sector: reduced to 50% by 2023 (NES)</p> <p>Working poor rate: reduced to 5% by 2023 (NES)</p> <p>Worst forms of child labour: completely eradicated in the fields of heavy and dangerous work, street work and migratory/temporary seasonal work by 2023 (NES)</p> <p>Child labour: reduced to below 2% by 2023 in other fields (NES)</p>	<p>Share of the population living on less than US\$4.3 a day (absolute poverty): less than 1% by 2018 (DP10)</p> <p>Percentage of individuals living in households where the total equalised household income is below 60% of the national equalised median income (relative of poverty): 19% by 2018 (DP10)</p> <p>Gini ratio: 36% by 2018 (DP10)</p> <p>Poverty (food and non-food): permanently reduced to less than 10% by 2023 (Strategic Plan of MoFSP)</p>

All the targets reflect Turkey's robust, evidence-based approach to policy making through the setting of specific national targets that are responsive to EU targets and benchmarking. Given the diversity of Turkey's specific needs and priorities, as described in the national Vision 2023, the country-specific indicators reflect particular policy priorities.

Tenth Development Plan (2014–2018)

The Tenth Development Plan (2014–2018) identifies a number of areas for the targeting of investment, including education and health, research and development (R&D) and innovative production, and steady high growth relating to, among other things, growth and employment; financial markets; science, technology and innovation; the transformation of the manufacturing industry; entrepreneurship and small and medium-sized enterprises (SMEs); intellectual property rights; information and communication technologies (ICTs); agriculture and food; energy; mining; logistics

and transportation; trade services; tourism; and construction, engineering and consultancy (Caglar and Azar, 2013).

The plan's targets include an emphasis on the qualitative transformation of the education system, including an additional increase in schooling rates (pre-primary schooling rate to 70% and overall schooling rate to 94% by 2018), a reduction in the number of students per classroom and an increase in the number of international students. The plan gives wide coverage to targets and policies that will enhance the overall quality of education. Recommended policies include improving teacher training, abandoning the current centralist structure of the education system, extending the use of technology in secondary education, promoting competition among higher education institutions, focusing on practical courses in vocational training, and harmonising education curricula with the demands of the business world.

A recent assessment of the Tenth Development Plan highlights the following challenges relating to its design, formulation and prospects for effective implementation:

- (i) strengthening the political advocacy and will to make the plan's targets a reality, ensuring sufficient focus on long-term policies;
- (ii) strengthening the connections with other decision-making processes;
- (iii) addressing monitoring and evaluation aspects;
- (iv) improving coordination between the different strategies and plans;
- (v) placing more emphasis on qualitative rather than quantitative targets, and ensuring they are realistic.

On the education front, the emphasis needs to be on quality rather than quantity: in order for Turkey to make the leap to the next level, it needs to invest in a high-quality workforce based on a high-quality education system. Despite the increase in schooling rates and physical capacity, the average educational attainment levels remain a challenge, with poor results reported in the Programme for International Student Assessment (PISA) tests. The increase in the number of universities has not led to significant improvements in university rankings. "Turkey's level of development and the quality of education students receive at schools is more critical than the number of years they spent at school...The education reform agenda has to be designed and implemented in tandem with the need for a qualitative jump as well as budget constraints" (OECD Turkey – Country Note–Results from PISA 2012).

Science and Technology Human Resources Strategy and Action Plan (2011–2016)

After the completion of the technology foresight programme in 2004, the Supreme Council for Science and Technology (SCST) mandated the Scientific and Technical Research Council of Turkey (TÜBİTAK) to coordinate the preparation of the Science and Technology Human Resources Strategy and Action Plan (2011–2016). The strategy prepared by TÜBİTAK was approved by the SCST in 2010, and had two main purposes, namely to increase the number of R&D personnel and to improve their sectoral and occupational distribution. During the preparation of the strategy document, 12 workshops were organised; these involved more than 500 research personnel from different institutions, including local and foreign academics, private sector R&D managers, and public sector laboratory managers. Ad-hoc committees involving various governmental and non-governmental stakeholders have also been formed with a view to improving the R&D climate for researchers based on practical, regulatory measures.

Strategic Plan of the Ministry of National Education (2010–2014)

The Strategic Plan of the Ministry of National Education (2010–2014) encourages the Chamber of Commerce, occupational associations and employer and employee associations to take the initiative in terms of ensuring more on-the-job training and establishing training units within enterprises. The private sector is encouraged to train the workforce according to labour market demand, with simplified bureaucratic procedures in place and recognised certificates given at the end of training. The number of cooperation agreements signed with companies should also increase. The plan does not as yet foresee incentives for the achievement of these objectives. The Regional Development Plans are based on a funding model in which up to 90% of the financing of different measures comes from the private sector.

A range of measures have been taken to incentivise companies to play an increasingly important role. The Vocational Education Law puts an obligation on enterprises with more than 20 employees to take on interns (apprentices or students) so that these make up 5–10% of the workforce. Most apprentices are in the 14–20 age group. Only 10% of former apprentices are jobless and 90% start their own businesses. Given the huge number of students in the Turkish education system, the uptake of the apprenticeship system seems quite limited. Furthermore, the lack of pathways towards higher education after apprenticeship training may have a negative impact on the quality and coverage of apprenticeship training.

National Strategy on Vocational Education and Training (2014–2018)

The Ministry of National Education (MoNE) has prepared a strategy document and action plan for 2014–2018 to improve the quality of vocational education and training (VET) in Turkey. The strategy has been prepared in cooperation with the Ministry of Development (MoD), the MoLSS and NGOs representing the business world, and details the priorities for improving the quality of VET in Turkey. The preparation of the Vocational and Technical Education Strategy Document and Action Plan (2014–2018) took into account the development plans, government programmes, the Vocational and Technical Education Action Plan (2008–2012), national education councils, EU education acquis, the Vision 2023 project, the Ministry of National Education Strategic Plan (2010–2014), the Lifelong Learning Strategy Document (2009–2013 and 2014–2018), the Industry Strategy Document (2010–2014), the Action Plan for Strengthening the Relationship between Employment and Vocational Education (2010–2014), the National Youth Employment Action Plan and the Information Society Action Plan. The basic priority is to provide young people with the necessary knowledge, skills and competency by structuring vocational and technical education (VTE) in accordance with the expectations of the local, national and international labour markets. The Vocational and Technical Education Strategy Document and Action Plan (2014–2018) has been formulated at the axis of three main policies aimed at developing the VTE system in Turkey, namely increasing access, capacity development and employment.

- *Access to VTE* includes awareness of the importance of VTE and access; flexibility regarding horizontal and vertical transitions between different types and levels of VTE institutions; increasing the access of groups requiring special policies; and developing cooperation in R&D activities.
- *Capacity in VTE* includes development of the VTE qualification system; national vocational standards and education programmes in line with qualifications; the educational environment; vocational guidance and career systems; administration and finance management; and quality development systems.
- *Employment with VTE* includes providing VTE students, trainees and graduates – including groups requiring special policies – with key competencies; workplace-based training; opportunities for creativity, innovativeness and entrepreneurship; occupational health and safety; and national and international mobility.

Cooperation and effective dialogue are of great importance in implementing TVET policies and strategies that require the participation of all stakeholders mentioned in this document. The Vocational and Technical Education Strategy Document and Action Plan (2014–2018), which entered into force with decision No. 2014/5 of the Higher Planning Council (dated 06/05/2014), will be implemented, monitored and assessed in collaboration with relevant parties through the Vocational and Technical Education Directorate General Secretariat, under the coordination of the MoNE.

Higher Education Strategy of Turkey (2007–2025)

The Higher Education Strategy of Turkey (launched in 2007) was developed by the Council of Higher Education (YÖK) and focused on promoting increased expectations for higher education in a global knowledge economy. Key strategic directions for higher education include:

- increase access and participation in higher education;
- develop an appropriate financing strategy to provide sufficient resources and to realise strategic objectives;
- diversify the education system in a flexible and open manner to allow institutions greater autonomy and ability to adapt to changing conditions;
- increase the employability of graduates and contribute to regional and economic development;
- improve and ensure the quality of higher education institutions and students;
- increase the number of graduate students and the amount of university research.

The Turkish strategy for higher education is further elaborated in the Ninth Development Plan.

National Lifelong Learning Strategy (2014–2018)

The National Lifelong Learning Strategy Paper, the Strategic Plan of the MoNE, aims to increase the participation of individuals between the ages of 15 and 64 in LLL to 15% by 2020, in line with the EUROPE 2020 targets. The strategy identifies 11 major challenges that must be addressed to achieve these goals, including weaknesses in the LLL system (inadequate data on LLL, poor coordination within the LLL system, gaps in the provision of some forms of LLL and for certain types of knowledge and skills, lack of reliability in the certification system and lack of flexible forms of LLL provision, and low recognition of prior learning (RPL) services), and the need to improve take-up of these programmes (lack of awareness of the importance of LLL for personal and career development, low level of participation in LLL programmes, lack of career guidance and counselling, and the inclusion of disadvantaged groups). The action plan comprises six priority actions containing 29 measures focusing on creating a culture of LLL awareness in society, increasing LLL opportunities and levels of provision, increasing access to these, and developing an LLL guidance and counselling system, a system for RPL and a monitoring and evaluation system for LLL.

Action Plan to Strengthen the Link between Education and Employment (İMEİGEP)

The MoNE has drafted an Action Plan to Strengthen the Link between Education and Employment (İMEİGEP), which aims to develop and implement the National Qualifications Framework (NQF), revise educational programmes in compliance with the national occupational standards (NOS), offering vocational guidance and counselling services, labour force training courses, and ensuring accreditation of VET institutions.

National Employment Strategy (2014–2023)

Turkey's National Employment Strategy (NES) and Action Plan (with a target date of 2023) has been in preparation for several years. It takes into account the EUROPE 2020 targets and identifies as priorities strengthening the relationship between education and employment, providing security and

flexibility in the labour market, increasing the employment of disadvantaged groups, and strengthening the relationship between employment and social protection.

In recent years, a significant high unemployment rate and necessity of development for employment have induced preparation of an applicable, effective and consistent national employment strategy by making detailed analysis and holistic working.

Ministry of Labour and Social Security started the preparatory works for the “National Employment Strategy” in October 2009. The “National Employment Strategy and Action Plans” which was prepared by adopting the principles of holistic approach, equal opportunities, protecting worker not job itself, no additional burden on employers, focusing on social dialogue and incentive approach, have been approved by Higher Planning Council in 6 May 2014 and were published in Official Gazette No. 29015 dated 30 May 2014.

National Employment Strategy aims to resolve the structural problems of labour market and to find permanent solutions for unemployment problems via increasing the contribution of growth to employment. In accordance with specified target, the main policy pillars of Strategy are strengthening links between education and employment, ensuring the flexibility and security in labour market, increasing the employment rate of vulnerable groups and strengthening links between employment and social protection.

Based upon to importance of policy making for sectors-specific, the employment policies have been created for textile, garment industry and agriculture labour intensive which has a high employment capacity with the sectors of tourism, construction, finance, informatics and health which have a high potential growth or employment elasticity of growth or predicted to be higher in the future. It was taken into consideration the growth tendency of the share of service sector in employment in developed economy and the effects of disengagement process in agriculture and textile to labour market.

Main targets of Strategy are decreasing the unemployment rate under 5 percent, increasing the employment rate over 55 percent and decreasing the unregistered employment rate in non-agricultural sectors under 15 percent by 2023.

The Strategy will be implemented through action plans which covers two-year period and be updated the end of each year by the Monitoring and Evaluation Committee. This Committee, chaired under the presidency of Undersecretary of MoLSS, will meet twice in a year in order to monitor the implementation process of the Strategy.

Youth Employment Action Plan (2011–2015)

In 2011, Turkey prepared a Youth Employment Action Plan with the International Labour Organization (ILO), with actions to be implemented by 2015. It is in line with EU priorities such as enhancing institutional capacity in promoting youth employment and strengthening the relationship between education and training and employment.

Gender Equality Action Plan (2008–2013)

The Gender Equality Action Plan (2008–2013), which is currently being updated, is another strategic document in this field. The priorities include increasing women's employability through VET and labour force programmes, expanding childcare and care services for sick, disabled and elderly people, raising social awareness – particularly among men – about decreasing the obstacles that constrain women's participation in economic and social life, and encouraging entrepreneurship. All these contribute to increased activity rates.

Action Plan to Strengthen the Link between Social Assistance and Employment (2011–2015)

The Action Plan to Strengthen the Link between Social Assistance and Employment aims to ensure that people capable of working, who have applied for and receive social assistance, benefit from

public employment services (PESs). Implementation of the Plan remains limited, while a national monitoring mechanism – a requirement of the relevant UN Convention – was officially established in 2013.

As regards the fight against the informal economy, Turkey is expected to adopt an updated version of its Informal Sector in the Labour Market Action Plan to increase institutional and inspection capacity, update workflows, and enhance inter institutional cooperation and awareness-raising. There is a need for specific strategy documents targeting groups in need of special policies. For example, a Roma Citizens Strategy has been drafted in order to address the needs of Roma people. The public institutions engaged in the sector have received substantial assistance from the EU for upgrading their institutional and administrative capacities. Significant improvements have been noted in labour market institutions, in education and training institutions, and in policy making.

1.3.2 Sectoral strategies for implementing Vision 2023

Export Strategy 2023

Turkey developed its Export Strategy 2023 in 2009 as a contribution towards the realisation of Vision 2023. The strategy's specific targets are to achieve an annual growth in exports of 12%, a share of world trade in excess of 1.5% of global volume, a total volume of exports from Turkey in excess of US\$500 billion, and a ratio of exports to imports in excess of 80% by 2023. Its implementation will create demand for new skills profiles, both on a technical level in terms of transport, logistics and management, and in terms of the human social and linguistic skills needed to interact with partners in important target markets. Strategic decisions concerning each logistic or export hub, in terms of their location and target markets, should have an impact on policies in education, training and LLL.

Tourism Strategy 2023

The Tourism Strategy of Turkey is a contribution to Vision 2023. Its goals for 2023 include attracting more than 63 million tourists per year with an average income of US\$1,350 per foreign visitor. The regional dimension emerges in terms of tourism linked to cultural heritage and the environment, leisure possibilities, and development in specific tourism zones, in eco-tourism zones and tourism cities, all linked by tourism 'corridors'. The chapter on education introduces a tourism education programme that will produce measurable outcomes and co-develop academic and vocational training programmes with universities and professional organisations, as well as boosting further education.

Agriculture Strategy and Strategic Plan (2010–2014)

The rational and integrated development of the agricultural sector in Turkey started with a strategy paper in 2006, followed by the Strategic Plan (2010–2014). This addressed agricultural production and security of supply, food safety, plant and animal health, rural development and institutional capacity, and referred to six strategic objectives and 38 strategic targets. These objectives relate to developing human resources and the organisational level in rural areas, and providing managerial and institutional capacity to offer efficient and qualified services. All aspects of the action plan involve education, training or LLL initiatives, usually in the form of outreach or advisory services.

Regional Development Plans for implementing Vision 2023

Turkey is divided into 12 regions, 26 sub-regions and 81 provinces, according to the NUTS 1, 2 and 3 nomenclature established by Eurostat. Specific importance has been given to the role of the regions to ensure stable economic growth and social development. Preparation of the Regional Plans (or Regional Development Plans) in Turkey are the responsibility of the Ministry of Development. The regional plans are defined as 'the plans designating the socio-economic development tendencies, the development potentials of the settlements, sectoral aims, activities and the distribution of infrastructure'.

Regional Development Programmes or Projects have been established with the goal of contributing to economic growth targets by accelerating regional and local development in order to contribute to the

development of the nation as a whole, in a way that reduces the disparities between regions, and ensures sustainable and balanced development. In 2006 a law was promulgated that established 26 Regional Development Agencies (RDAs) with specific tasks, primarily to act as coordinating/facilitating intermediaries to foster structured partnerships among state institutions, local authorities, the private sector, NGOs and universities. It is a specific priority to further enhance regional capacity and thereby reduce the predominance of central decisions in favour of giving the lower levels of government and administration more responsibilities. A possible solution would be to give the RDAs full responsibility for preparing Regional Development Plans and Programmes.

1.3.3 Turkey – EU partnership documents

IPA – Human Resources Development Operational Plan

Based on the evaluation of the IPA I implementation cycle, the IPA II: 2014–2020 – Human Resources Development Operational Plan (HRD OP) focuses on measures to promote Turkey's progress towards the European social model and alignment with EU acquis in employment, education and social policy, through measures promoting jobs, employability and capacity development; improving LLL, adaptability, access and quality of education at all levels; and addressing social inclusion through improved capacities and access to social services, and enhanced links with the labour market.

Employment and Social Reform Programme (2014–2020)

The Employment and Social Reform Programme (expected to be concluded by the end of 2014) identifies the joint priorities of the EU and Turkey in the field of employment, social inclusion and social protection. Participation of the Turkish authorities in EU-level open coordination mechanisms may be encouraged in this context.

Related to the above, a relevant policy document is the Prime Ministry circular on Increasing Women's Employment and Promoting Equal Opportunities, which aims to initiate coordinated action to strengthen the socioeconomic conditions for women, to ensure equality for women and men in social life, and to create sustainable economic growth and social development. The financeable actions need to be accompanied by baseline studies and indicators.

2. The Foresight Approach and Process

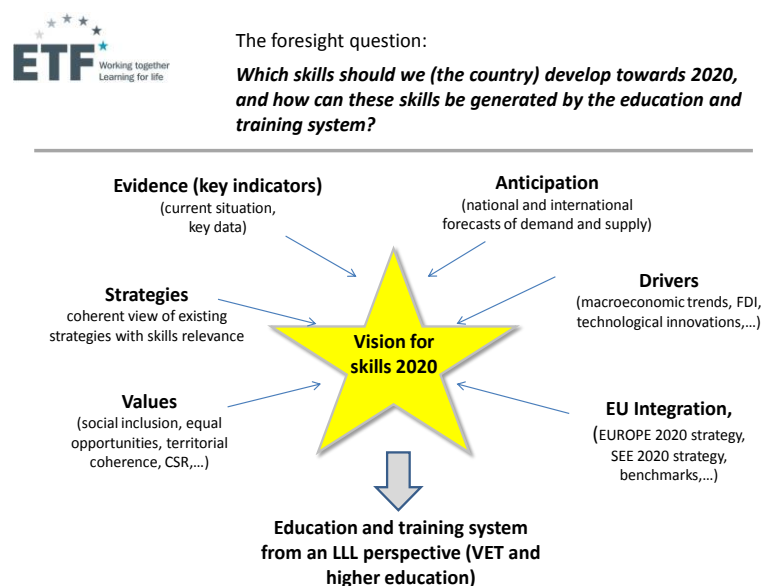
2.1 Foresight approach and rationale

Foresight is a change-management tool that helps leaders and those responsible for change to:

- clarify the challenges they face;
- elaborate a hopeful vision of what can be achieved;
- prioritise the actions required;
- understand the kind of collaboration needed to succeed.

It anticipates change rather than reacting to it, and explores alternative future scenarios rather than seeking to predict a single future. It employs techniques that are useful in contexts of complexity and rapid change, such as horizon scanning, identifying trend breaks and disruptors, exploring disruption and business-as-usual scenarios, and visioning. It makes use of forecasting to help visualise, understand and analyse trends, but goes beyond forecasting to combine more qualitative techniques such as the analysis of trends and drivers, and story-telling and narratives to describe alternative futures. Its distinctive feature is its participatory approach: it brings in a range of insights, perspectives and disciplines as a means of developing a more robust future. Moreover, in order to create alignment among the key actors, it fosters mutual awareness of the interdependence of their actions, the need for coordination and the opportunities for mutual reinforcement and support.

Figure 1: The ETF FRAME foresight question and related issues



While developing this projection, the skills development are taken to the forefront of policy making, based on key indicators of the education and training related strategies within the broader policy frameworks.

Foresight takes into account a broad range of issues and trends, and uses existing evidence to substantiate decisions. A qualitative approach is considered the most suitable for launching a vision-building activity, given the high number of stakeholders involved in skills policies and the availability of data. The key objective of the foresight exercise is to promote a more future-oriented approach to

skills policies, involving key stakeholders (public and private) and bringing together different existing country strategies that are relevant to education, training, skills development, employment and economic development into a coherent vision on skills for the future. Moreover, the process aims to break down barriers between the ministries in charge of skills development and to develop more joined-up policy approaches for skills development by bringing together the key players in the sector and by identifying the interfaces between the existing strategies relating to skills development.

The methodology designed for the project aims to address some fundamental questions.

- Which skills should we (the country) develop towards 2020, and how can these skills be generated by the education and training system?
- What are the feasible and preferred options, based on resources and capacities (available and to be further developed)?

The use of foresight in elaborating Vision 2023³ was recommended by TÜBİTAK (the driver of the exercise) as an effective approach for creating commitment among the stakeholders, and for reducing fragmentation in the planning and implementation of S&T policies. A key success factor in the Vision 2023 foresight was that it secured the backing of the government, and consequently, the policy proposals and recommendations have been taken seriously. The programme aimed for and secured wide participation and ownership on the part of the stakeholders as a key to the successful implementation of outcomes.

While targeting the national level, Vision 2023 has a specific focus on S&T-driven growth, through the formulation of an S&T vision and policies for Turkey up to 2023, setting strategic technologies and priority areas for R&D, engaging a wide spectrum of stakeholders and creating public awareness of the importance of S&T for socioeconomic development. The exercise focused on developing a set of criteria to prioritise: the sectors in which Turkey has today, and is likely to have in the next 20 years, competitive advantage; and the sectors that are technology and policy relevant. Where the success of a sector is not dependent on S&T policies, but on other policies (e.g. financial policies), it was not included on the list. The foresight exercise identified nine technology- and policy-relevant sectors for boosting the country's competitiveness and economic development, and two cross-cutting thematic areas, namely education and human resources, and environment and sustainable development. The resulting recommendations reflect a strong R&D focus, identifying strategic areas of technology and the R&D expenditure and workforce required to develop them.

Indeed, Vision 2023 reflects a national vision that is very much driven by the idea of technology as an engine of future growth. The Tenth Development Plan (2014–2018), which sets out the roadmap for achieving Vision 2023's objectives, maps and addresses a wide range of policy areas. The 2023 Vision is intended to serve as an umbrella or point of reference for drawing all the related strategies and action plans together, allowing for greater policy coherence and reducing fragmentation and duplication of efforts and resources. The extent to which this is addressed in the area of HRD and skills is a key question. What are the key skills-related challenges that the achievement of Vision 2023 poses? What additional HRD and skills-related challenges is Turkey facing up to 2023? How can these challenges be contextualised to take account of a national and international environment that has undergone considerable change since Vision 2023 was formulated and that is set to undergo further significant change up to 2023?

In the current and emerging phase up to 2023, Turkey is poised to undergo further growth (economic, demographic), together with processes of urbanisation and diversified industrialisation, including the

³ http://forlearn.jrc.ec.europa.eu/guide/6_examples/turkey2023.htm

decline of many traditional sectors, including agriculture. The latter will cause challenges on the overall strategic approaches in Turkey in terms of growth and productivity. Addressing the challenge of hi-skills, lo-tech skills of people active in the agriculture and also the issue of re-skilling in a lifelong learning perspective of those who stay or quit the sector should be a priority.

Vision 2023 focuses on Turkey's transition to a knowledge-based economy in which business service industries are the principal economic driver. Vision 2023 has set Turkey on the path to achieving prominence in energy, transport, defence and space exploration, through sustained investments in the required technologies and competencies. In this respect, Vision 2023 and its implementing programmes project the ambition of a hi-tech, hi-capability country, made possible through investment in the section of Turkish society that delivers advanced degrees and S&T excellence in line with global standards. There is no doubt that the success of such hi-tech ambitions can bring great benefits to the whole of Turkish society. However, such ambitions also depend on the lower-level, low-tech workforce, including the technicians, who support the process.

Thus, in Turkey the FRAME initiative is focusing on the need to revisit Vision 2023 and to formulate a complementary scenario of a 'low-tech, high-capability' country that would drive job creation and the equitable growth of its regions, and harness the skills and talents of individuals from different societal groups, in particular young people, women and those from disadvantaged sections of the community, to the benefit of the economy and society. The focus of the low-tech, high-capability Turkey is less top-down and more bottom-up, building on the potential of less advantaged groups and developing their skills to match current and emerging job opportunities. An increased female participation to the labour force will help to reach the 2023 targets.

The challenge is to develop an education and training facility that anticipates and provides the types of high-quality, adaptive skills and competencies required to meet the demands of a knowledge-based economy in transition. The challenge is considerable, given the changing nature of work resulting from the ongoing impact of technology and innovation on different sectors of the economy, including manufacturing, services and agriculture, among others. Specific trends heralding a 'new age of the machine' and recent trends in manufacturing referred to as a 'third industrial revolution', as well as changes in the nature of innovation, are changing the nature of work, the economic models of production and the skills required to enable workers to be productive. Additional challenges relate to breaking old patterns of life and securing a stronger female participation in the workforce. In this respect, the current Vision 2023 target for female participation to reach 38% may be modest and inadequate if Turkey is to achieve its Vision 2023 goal of US\$25,000 per capita GDP (Asik, 2013).

Further innovative solutions for an increased contribution of business side into investments and delivery of education and training are key to support increased education attainment and skills relevance in Turkey with a direct impact on increased employment for an inclusive growth.

2.2 The FRAME foresight process

As a result of the refined foresight rationale outlined above, the FRAME foresight process was redesigned to follow a different approach in Turkey from the regional approach undertaken in the countries of South Eastern Europe. The FRAME foresight process in Turkey builds on the strategic directions and technological activity areas identified in Vision 2023, and on the insights and experiences generated, to develop a scaled-down, embedded foresight activity that focuses specifically on the skills-related challenges of Vision 2023. The aim was to use the results to provide an input to HRD OP 2014–2020. Thus, the approach adopted was to participate in and contribute to key ongoing activities focused on skills-related challenges and themes.

The foresight process in Turkey entailed the following main phases.

Phase	Details	Dates
Start-up phase	Work started on analysing relevant documents, including skills-related strategies and related reports, to extract a preliminary list of skills-related challenges and issues.	September 2013
Consultation phase	<p>This process started in September 2013 with discussions with the MoLSS, the coordinating ministry for the ministries who have the leading role in national policy-making in education and training, employment and the labour market, social policy and inclusion (HRD). The work was followed in February 2014 by three thematic workshops organised by the MoLSS on the HRD programming for IPA II. The stakeholders' discussions were based on sector analysis of the HRD sector and three analytical reports on education and training, employment and social inclusion.</p> <p>Another workshop, Promoting Lifelong Learning in Turkey: Putting the LLL Strategy in Practice 2014–2018, was held in Antalya on 12–13 March 2014. This workshop was organised and hosted by the MoNE with the support of the ETF and in cooperation with the EU Delegation to Turkey. It formed part of the long-standing work of the Turkish government to determine medium- and long-term policy reforms and measures with the aim of extending and improving LLL provision in Turkey.</p> <p>A seminar, Enhancing integrated approaches in HRD and employment policies in Turkey, was organised by the ETF on 5–6 May 2014 in cooperation with the MoLSS. The objectives of the seminar were to expand the knowledge of and provide practical insights for labour market practitioners, and to enhance the integrated approach to HRD in Turkey, exploring the synergies and potential for mutual reinforcement of different national and EU policy strands and processes. Throughout the seminar, the results and outputs of the EU-funded actions in the field of HRD were discussed, with a focus on increasing the quality of PESs and promoting LLL.</p> <p>The discussions allowed the appropriate scoping of the FRAME foresight process.</p>	September 2013 – June 2014
Visioning phase	A transversal workshop was held in Ankara on 23 September 2014, focusing on the further elaboration of this approach, building on the current strategic framework and looking into the key challenging areas for skills development in Turkey from a medium- to long-term perspective.	September 2014
Follow-up	<ul style="list-style-type: none"> ▪ formal debriefing of results for policy makers ▪ communicating results to a wider audience ▪ building on FRAME and implementing the high-level plan 	September–November 2014

The ETF team contributed to three workshops organised by the Turkish government in February 2014 and provided inputs into the drafting of the final IPA II HRD document. These and many other events in the Turkish regions were coordinated by the EU Coordination Department of the MoLSS. Details are provided below.

**Conference: Promoting Lifelong Learning in Turkey: putting the LLL Strategy in Practice
2014–2018 – Antalya, 12–13 March 2014**

Purpose	This event was organised by the ETF in cooperation with MoNE, and was part of the long-standing work of the Turkish government to determine medium- and long-term policy reforms and measures with the aim of extending and improving LLL provision in Turkey.
Objectives	<ul style="list-style-type: none"> ▪ ensure stakeholders understand the implications of the National Lifelong Learning Strategy ▪ strengthen ownership of the different priorities among stakeholders ▪ assist in translating the priorities into doable actions that can be used in building the provincial action plans ▪ identify next steps, including support measures from the EU and the ETF
Participants	<p>The 135 participants represented policy- and technical-level representatives from:</p> <ul style="list-style-type: none"> ▪ ministries: education (central and provincial level); labour and social security; family and social policy; health; culture and tourism; science, industry and technology; development; finance; environment and city planning; youth and sport; transport, and forestry ▪ authorities in charge of vocational qualifications, higher education, PESs, scientific research, SME development, international cooperation and media stakeholders: employers' associations, trade chambers, education and training providers, municipalities' unions and NGOs, representatives of the EU Delegation in Ankara and the ETF, who jointly with Turkish counterparts provided expertise on LLL from the wider perspective of EU HRD-related goals
FRAME focus	Issues of foresight and skills were presented to participants
Website	http://www.etf.europa.eu/web.nsf/pages/EV_2014_Promoting_Lifelong_Learning_in_Turkey_putting_the_LLL_Strategy_in_practice?opendocument

Seminar: Enhancing Integrated Approaches in HRD and Employment Policies in Turkey – Turin, 5–6 May 2014

Purpose	<p>The seminar was organised by the ETF in cooperation with the MoLSS as part of the long-standing cooperation between the ETF and Turkey on policy reforms focused on HRD and their contribution to economic and employment growth and social inclusion. The seminar responded to requests from the Turkish authorities in relation to:</p> <ul style="list-style-type: none"> expanding the knowledge of, and providing practical insights for, labour market practitioners enhancing the integrated approach to HRD in Turkey with focus on a full exploration of synergies and the potential for mutual reinforcement of different national and EU policy strands and processes
Objectives	<p>The objectives were to:</p> <ol style="list-style-type: none"> explore the potential of lifelong guidance for improved transition within the labour market, with a focus on the role of İŞKUR Job and Vocational Counsellors and the further needs in terms of service expansion and quality improvement expand stakeholders' knowledge on the latest international, European and national (Turkish) evidence on impact assessment of active labour market policies (ALMPs) and discuss how policy evaluation outcomes can shape ALMP design and delivery in Turkey strengthen ownership of the different HRD priorities among stakeholders and optimise the synergies and the potential for mutual reinforcement of national and European long-term planning, monitoring and evaluation of policy progress (IPA II – HRD OP 2014–2020; Employment and Social Reform Programme; the Bruges and Torino Processes; and regional policy dialogue initiatives, e.g. FRAME project) identify the next steps, including support measures by the EU and the ETF
Participants	<p>Participants included policy- and technical-level representatives from the MoLSS, the MoNE, İŞKUR, employers' associations, trade unions, NGOs and academic experts. The EU Delegation to Turkey and the European Commission actively contributed to the event.</p>
Key outcomes	<p>The results and outputs of the EU-funded actions in the field of HRD (increasing the quality of PESs, promoting LLL, etc.) were discussed.</p>
FRAME focus	<p>Enhancing an integrated approach to the monitoring and evaluation of progress towards HRD goals and targets</p>
Website	<p>http://www.etf.europa.eu/web.nsf/pages/EV_2014_Seminar_on_Enhancing_integrated_approaches_in_human_resources_development_and_employment_policies_in_Turkey?opendocument</p>

Conference: Long-Term Vision, Planning and Delivery of Skills for the Future – Ankara, 23 September 2014

Purpose	The event was organised by the ETF in cooperation with the MoLSS as a joint action to further explore the skills development dimension of different policy priority areas for HRD in Turkey, and how national and regional actors and future EU funding can support the enhanced delivery, monitoring and evaluation of policies.
Objective	<p>The main objective was to discuss with the key stakeholders in Turkey the actions needed to tackle the central and regional dimensions of skills gaps and mismatches, with a view to supporting economic competitiveness and inclusive growth at central and regional level.</p> <p>The main areas for discussion and review were:</p> <ol style="list-style-type: none"> 1. taking stock of the main strategic goals for HRD and how they link to economic competitiveness, regional development, sectoral growth, science, technology and innovation, and inclusive growth 2. the contribution of national and regional authorities and other stakeholders to enhanced planning, delivery, monitoring and evaluation of skills development policies 3. a specific focus on regional development, inclusive policies and matching skills supply and demand through improved referral systems, cooperation with local actors, targeting of groups and persons at social risk, improving the future-sighting (e.g. foresight), and linking up skills anticipation exercises with robust matching initiatives (such as reviewed occupational and qualification standards, teacher and trainer training, improved career guidance, and the adaptation of training programmes delivery to current and future needs)
Participants	There were around 130 participants: representatives from different ministries, local development agencies, universities, authorities in charge of vocational education and vocational qualifications, education and training providers, employment services, employers' associations, unions, research centres, municipalities, NGOs, the European Commission, the EU Delegation to Turkey and the ETF.
Key outcomes	The results and outputs of the EU-funded actions in the field of HRD were discussed.
FRAME focus	Enhancing a sectoral and regional approach for skills development and an integrated approach of monitoring and evaluation of progress towards HRD goals and targets
Website	http://www.etf.europa.eu/web.nsf/pages/EV_2014_Long-term_vision_planning_and_delivery_of_Skills_for_the_future?opendocument

The discussions held during these events led to a clearer understanding of how the FRAME initiative can be used effectively to support and complement Vision 2023. The recommended way forward is to use the work done under FRAME to focus on women activation, development of a low-tech, low-capability country. This would complement and dovetail with Vision 2023, which essentially projects a vision of a high-tech, high-capability Turkey and take account of relevant developments and changes that have occurred in the ten-year period since Vision 2023 was adopted. It would also drill down to lower-level capability needs, including regional and sectoral specificities, to support the higher-level capabilities for implementing Vision 2023. The aim is to drive job creation and equitable growth in Turkey's regions.

Thus, Skills Vision 2020 for Turkey elaborates a vision for a national skills-related foresight system that will help the country to achieve the goals outlined in Vision 2023, and includes the following features:

- technology foresight initiatives to update the original work of TÜBİTAK for Vision 2023;
- skills foresight initiatives that focus on how new technology is changing the nature of work and demand for new skills, and its impact on LLL;
- regional foresight initiatives that localise/contextualise the results of these activities in order to optimise the system for LLL at the level of the various regions of Turkey;
- foresight initiatives targeted on specific populations, such as women, to ensure that the system provides a complete solution to their particular employment challenges.

2.3 The partners and participants

The events held under the FRAME initiative to discuss skills development policies were attended by a very diverse group of more than 120 high-level participants from MoLSS, MoNE, MoD, Ministry of Family and Social Policies (MoFSP), Ministry of EU Affairs, Ministry of Health, TÜBİTAK, the Union of Chambers and Commodity Exchanges of Turkey (TOBB), İŞKUR, Turkish Statistical Institute (TURKSTAT), Vocational Qualifications Authority (VQA), Regional Development Agencies, universities, authorities in charge of vocational education and vocational qualifications, education and training providers, employers' associations, unions, research centres, municipalities, NGOs, the EU Delegation to Turkey, EU experts and international organisations (British Council, UNICEF, ILO, etc.) based in Turkey. This list is not exhaustive.

2.4 Key issues and challenges identified

The consultative events described above allowed for further reflection and insights on the key skills-related issues and challenges that Turkey is currently facing up to 2023. This will provide the basis for a discussion on the changes needed for the future. Two issues stand out as being of paramount importance, especially in terms of the demands they would place on the system for LLL. These issues are youth employment and the activation of the female workforce. This is not just about jobs, but also about social harmony among populations that are at risk of falling below the poverty threshold.

Challenges linked to societal drivers

Youth population bulge

Turkey's population is young, with a median age of 30.4. The proportion of young people in the population will increase for around the next 20 years, slowing down after this as a result of decreasing fertility rates and increasing life expectancy. In 2013, a quarter (24.5%) of the total population was aged 0–14, 67.8% was of working age (15–64) and 7.7% was aged 65 and over. The positive aspect of the youth population bulge is the 'one time only, demographic bonanza'⁴. However, the question is whether in reality this constitutes an opportunity or a threat. A large young population can be considered an opportunity only if this population is educated and/or employable. An educated but unemployed youth population is a cost, first in terms of education and then later in terms of

⁴ IPA II programming workshop (2014)

unemployment benefits. So it is important to ensure the best match possible between education and employment opportunities for young people. There is the very real question of whether and how the country can afford this, and whether or not the growth and tax revenues generated elsewhere in the economy will be enough to sustain a high standard of living.

Youth bonanza/unemployment

In order for the benefits of a 'youth bonanza' to be realised, a range of challenges need to be resolved, including effective interaction between job creation, the labour market system and the system for education, training and learning. Recent experiences of relatively successful EU economies offer cautionary tales. For example, in the UK⁵, despite improvements in the overall unemployment rates, recent growth benefits have been slow to accrue in the youth sector. This is due to a series of fundamental changes to the structure of work, whereby jobs that were previously available to young people no longer exist. Efforts by the government to address this have yielded mixed results. Youth unemployment in the UK is currently about 20%. The situation in Spain and Italy is even worse, with youth unemployment rates at over 50%. One of the consequences of this situation is that unemployed young people will give up looking and become inactive. Apart from lost economic productivity, there are also future costs relating to healthcare as a result of the impact of long-term unemployment, and the risk of social unrest. In order to address this challenge, one approach is to pilot a foresight action aimed at harnessing the youth bulge, or realising the youth bonanza.

Poverty and social exclusion

Poverty, or the threat of falling into poverty, is a major social problem in Turkey, with almost one in every four households at risk. The relative poverty rate has remained almost the same since 2007 (22.8% for 2007; 22.6% for 2012). Furthermore, despite the fact that this indicator is related to GDP per capita, which for Turkey is around US\$10 100 (lower than the EU27 average of around US\$34 750 in 2011), and the poverty rate in Turkey is much higher than the EU27 average⁶, Turkey has managed to decrease absolute poverty since 2007 and the share of the population living on less than US\$4.3 a day has decreased by more than 6 (8.4% for 2007 and 2.3% for 2012). More than half a million individuals have succeeded in raising their income beyond the at-risk-of-poverty rate.

Estimates for the number of years before Turkey will converge with the EU in terms of poverty and social exclusion are quite alarming (Table 3), and highlight the fact that the situation is urgent and requires a huge effort, including new thinking.

Table 3: Key indicators and number of years before convergence with the EU

Indicator	Years before Turkey converges with the EU
Population at risk of poverty (60%)	18
Income distribution S80/S20	15
Employment	36
Life expectancy at birth	15
Labour market participation	90
Gini coefficient	27

Source: Balaban (2014)

⁵ A recent sponsored article explains how the situation has been evolving in the UK (Economist Intelligence Unit, 2014).

⁶ World Bank, <http://data.worldbank.org/indicator/NY.GDP.PCAP.CD>, accessed on 12 April 2013.

On some indicators, such as life expectancy at birth, Turkey will catch up with the EU average in about 15 years. In other areas, such as employment, it may take Turkey several decades to catch up. This highlights the fact that if the system continues to function as it does, the time needed for convergence will be very long. Therefore, it will not be enough to focus on improving current ways of doing things, as this will not resolve the problems in terms of achieving the growth and employment rates to which the country aspires.

Unemployment

Recent trends in long-term unemployment rates indicate a mixed picture for the labour market in Turkey. Long-term unemployment rates are much lower than in EU27 countries, and the rate has fallen consistently since 2004, with the same trend applying to the nominal figures. This indicates an increasingly active labour market and a potentially positive outcome of the relevant policies. Turkey is one of the 12 Member States and candidate countries that were able to reduce their unemployment rates within the past 8 years, bringing it close to the EU27 average (8.1% for Turkey and 10.5% for EU27 countries in 2012). Countries with a comparable population size, such as Germany and Poland, have performed better in recent years in reducing their unemployment rates. These observations should not lead to complacency or to an underestimation of the difficulty of creating jobs for the constantly growing and young working-age population.

Low female participation in the workforce

The low level of female participation in the workforce is due to a large extent to the fact that many women are not even actively seeking work. While both long- and short-term unemployment has been decreasing among males, short-term unemployment among females has been nominally increasing, and there has been no major change in long-term employment in terms of the nominal figures for women.

Table 4: Labour force participation and employment rates (%)

	Labour force participation (%)				Employment (%)			
	2007		2013		2007		2013	
EU28	70.3	M: 77.6	71.9	M: 78.0	65.3	M: 72.4	64.1	M: 69.4
		F: 63.1		F: 65.9		F: 58.1		F: 58.7
Turkey	49.1	M: 73.4	54.4	M: 75.6	44.6	M: 66.8	49.5	M: 69.5
		F: 25.2		F: 33.2		F: 22.8		F: 29.6

Source: Eurostat; M: Males, F: Females

An important issue that runs through most policy and planning documents is the need to activate the female workforce. The challenge is not one of moving 'unemployed' women into 'employment', but of transforming 'inactive' women into 'active job seekers'. Meeting this challenge requires attention being paid to job opportunities for women and to the nature of work they might perform. Success will require a whole set of adjacent measures dealing with lifestyle, culture and practical considerations that are traditionally out of scope for policies relating to education, training and learning. These include childcare, access to crèches, kindergartens or pre-schooling, care of the elderly, housework, attitudes to work and women's role in the family, bullying in the workplace, in school and at home, and real options for employment. Success will mean that there are not only more women in work, but more children in school and higher household incomes, leading to more stable families and brighter futures overall.

Lower educational attainment

In every individual age group, Turkish citizens have much lower educational attainment rates than the EU27 average. Within the population over school age, the gap is more than 2.5 times. The ratio for the 35–44 age group is higher than the overall average, and therefore the gap is larger. Turkey's tertiary educational attainment stood at 19.2% in 2013, compared to the EU average (35.8%) and EUROPE 2020 target (40%). Belgium, Denmark, Estonia, Finland, France, Ireland, Luxembourg, the Netherlands, Spain, Sweden and the UK meet or exceed the 40% benchmark set by the EU. There has been progress in every age group since 2006, with the 25–34 age group making the most progress. However, progress in recent years has not kept pace with the overall performance of the EU.

Core issues to be addressed in HRD policy planning and delivery.

Need for structural and systemic change

There is a need for change on a massive scale in the structure of society and the economy if the potential for employment of the two key groups (young people and women) is to be even partly realised. This will demand changes to the system in terms of education, employment and social services, and will need to be a complete solution involving the cooperation of a large number of government, public sector and private sector actors. Systemic change on this scale is a challenge for the future, requiring new thinking and faster responses. There are no examples that can be copied. It may be possible to build on existing foresight capabilities in Turkey to pilot the use of foresight in ways that go beyond technology, and address more directly the question of where new jobs will come from and what skills will be needed to perform them.

Low tech vs high tech

Our observation is that Vision 2023 relies on a belief that the rapid development of a number of technology-dependent sectors could create jobs for elites in a limited number of metropolitan areas that have easy access to excellent universities and national research centres. This, in time, could stimulate further waves of development in other regions of the country, in other sectors of the economy and for a much broader spectrum of worker profiles. However, the responses of the EU, Japan and the USA to recent recessions hint at the very real prospect of a jobless recovery, a decoupling of growth from job creation that may be permanent, and not a simple lag between people being laid off and other uses being found for available labour. There is a growing international debate about this. It may have a significant impact on Turkey's economy, in particular in terms of adverse effects on the country's options for future job creation.

These observations call into question the adequacy of high-tech industry as the main driver of future growth in Turkey and suggest the need for additional growth mechanisms that emphasise job creation on the scale required for equitable and balanced development in the regions. The great diversity of the regions calls for a differentiated approach to economic development and employment creation. The EU and international discourse has raised major discussion points and dilemmas relating to the fact that the basic function of technology is to change the nature of work, and as a direct consequence, the skills required for workers to be productive. This is illustrated in the literature with reference to specific trends in robotics that some consider as heralding a 'new age of the machine', recent trends in manufacturing that are being referred to as a 'third industrial revolution', and changes in the nature of innovation. Observations such as these provide starting points for strategic conversations on how technology can change the nature of work, the economic models of production and the skills required for workers to be productive. This discussion should also feed into a better matching of supply and demand by focusing education and training delivery towards the required skills on mid to long term perspective.

Structured dialogue between government and the private sector, including the non-governmental organisations

In all the stakeholders' discussions, private sector, including the NGOs, inputs have focused on the need for a close cooperation for skills developments between the private sector and the educational and government officials. There is a need to improve the interface between the government and the private sector in terms of governance mechanisms and the organisation of consultation processes. Based on the results of the latest employment survey, one in three employers surveyed experiences frustration with the labour market through not being able to fill vacancies and find candidates with the desired skill set. İŞKUR field workers can provide insights into how this issue should be addressed. A key challenge is the classic labour market mismatch: there is a need to focus on whether this is merely due to weak dissemination of relevant information among market actors, or whether, and to what extent, it is also related to course content and pedagogical goals that are being overtaken by a rapidly changing economy. Is the weakness the missing link on the side of educators, companies, or both? Is it mainly a problem for universities or for VET graduates? It is possible that technologies that accelerate changes in the nature of work are exacerbating this problem. The role of NGOs becomes prominent in addressing the issues of ensuring efficient pathways towards employment and delivering skills development. This requires capacity development for the actors, not only on policy design but most importantly to monitor and assess impact of the policies.

Anticipation of future labour market needs

A question that requires attention is where jobs will come from in the coming years. In the future, it could be useful to link discussions on the education, training and learning system more closely with the models for inclusive and innovative growth in sectors that have potential to create a large number of new jobs, not just in manufacturing, but also in areas such as tourism and agriculture. The current system is based on responding to the needs or demands of industry, mainly as a result of the way in which local economies are being created on the basis of vast transformational programmes, such as dam-building in South-eastern Anatolia, the South-eastern Anatolia Project/Güneydoğu Anadolu Projesi (GAP), the development of transport and logistic infrastructure in the Middle Black Sea region, and the international financial hub in Istanbul. It is likely that Turkey will reap large rewards from these efforts. The task of anticipating future labour market needs is facilitated by the constructive approach to development. However, once these gains are locked in, new challenges will arise as the free market system takes over. Training needs initially identified will evolve as the economy evolves and the challenge of anticipating these new needs will become increasingly important.

Regional dimension of anticipating labour market needs

The trend towards uneven growth across the regions is set to become more acute in the coming period, indicating that Turkey will continue to struggle with deep regional and social disparities, with the wealth of the country concentrated in the western provinces. In the near future, a larger part of the population will be concentrated in metropolitan and urban areas, resulting in a move from traditional agriculture to service and industrial sectors, coupled with an urbanisation process that poses further skills and social cohesion challenges. The accompanying population bulge and the skew towards a young population will require the development of specific skills, and of support facilities and services to help young people and those from less advantaged groups to enter a more dynamic labour market and demanding work environment.

Attempts are being made to understand the processes that shape regional economies and that perpetuate the differences between regions and major metropolitan areas, with a view to creating policies and programmes to offset these differences. This requires a set of well-designed and coordinated HRD, education, employment and social cohesion policies at national and regional level that are fine-tuned over time based on good practices and lessons learnt. The challenge is considerable, given that the transition to a knowledge-based economy poses its own challenges that relate to managing the development and upgrading of skills to match emerging job opportunities. A high-quality education and training system is needed that is accessible to all, with a strong emphasis

on LLL. Achieving the LLL 2023 targets will require a significant contribution through central but also regional policy and practices in Turkey, in order to build LLL structures to meet capacity and quality needs, thereby ensuring the targeted increase in employment.

Once the stimulus of government-backed investments wears off, the regions may be exposed to many critical threats that most advanced economies face today. These include the following:

- Employment is more volatile or less permanent.
- Industry is unsure of what its future skills needs will be.
- Markets are changing increasingly quickly. Economic opportunity and consumer growth are occurring differently from previously, or are happening outside Europe. Turkey has diversified its markets significantly: Iraq is its second market after Germany, and it has increased its exports to Africa and the Middle East.
- The link between growth and employment is more tenuous than in the past. Recent crises have been followed by jobless recoveries.
- Work is being transformed by technology more quickly and more radically than before. Many occupations are in serious risk of becoming obsolete.
- In the future, neither growth nor employment will come from the same place as previously, nor will they happen in the same way.
- This will put extra pressure on a system that is in many ways trying to catch up with a moving target and to move ahead in ways that may not be easy to predict.

There are advantages in moving towards a more anticipative approach, starting from models of growth and working backwards towards models for jobs and the skills needed to do them. Although the general trend of people moving from rural to urban centres may help, the challenge will be greater in the smaller cities than in the very large cities such as Istanbul, Ankara and Izmir. The Middle Black Sea Region, for example, has experienced an overall decline in the number of people employed in industrial activity. New jobs are mainly being added in areas such as retail and social services. This may not be a sustainable situation. The challenge of addressing the real reasons why jobs are being lost and what new jobs might replace them is easier to achieve at the local level, with local industry and local investment agencies, than at central government level. The reason is practical rather than political: there are too many regions, provinces, districts, cities and towns to address from a central government perspective. The Regional Development Plans have taken this into account and foresee further planning activities as implementation progresses.

Doing the same things better will help, but will not be enough to achieve an economic transformation that is inclusive of all sectors of society. The new and better system needs to do more than just respond to demand. It cannot simply follow the growth that has been created by government-sponsored transformation programmes; it must eventually drive growth based on anticipating international trends and the needs of local entrepreneurs and investors.

The key questions of concern are:

- How will growth and employment happen there?
- How much prosperity will trickle down to the regions from Turkey's high-tech projects?
- How much of this growth will come from public procurement or government markets?
- Will growth from exports and other areas be enough to finance this?
- How much growth will come from indigenous growth?

Harnessing the youth bonanza will be an important part of this approach. The solution may need to combine elements not usually associated with traditional policy approaches. For example, there may be a need to coordinate actions that address early school leavers and high drop-out rates; parents' awareness of the importance of education; attitudes of young people towards apprenticeships; opportunities for second-chance education at vocational level; bridges from vocational or job experience to higher education; quality issues; and infrastructure. The real challenge is not so much the intellectual recognition of these needs, but the local problem solving that must be done to address them. Problem solving must focus on having the right elements in the right place with the right kind of communication or outreach strategies. This involves getting people around the table at the local level, helping them to translate the abstract problem into a local operating challenge, and supporting them in the implementation of local solutions.

3. The vision, priorities and roadmap

3.1 The vision statement and descriptors

Building on previous sections, Turkey's long-term vision for HRD and the way it is reflected in Turkish policy and programming documents is summarised as follows. *By 2020, Turkey is a socially cohesive knowledge-based economy with reduced regional inequalities and a proactive entrepreneurial young and female workforce, driving the high-tech, low-tech, and high-capability agenda. Coordinated and coherent employment, education, and social cohesion policies complement the sectoral skills-related priorities at national and regional level, anticipating labour demand and providing high-quality supply of required human resources.*

3.2 Priorities and measures

The key priorities for achieving this vision in the areas of education, training, employment and social inclusion are:

1. creating an inclusive and more effective labour market that will help reduce regional disparities; achieving improved employment rates, especially for women, young people, and those from disadvantaged groups; promoting good-quality and decent jobs;
2. establishing a flexible, transparent, innovative and quality-based education system that supports social and economic development and prepares individuals for employment, and in which all segments of society have the opportunity to learn according to their own needs; achieving improved educational attainment and skills levels by investing in people and institutions, both in initial and continuous education and training, within a lifelong and inclusive perspective;
3. building an inclusive society through effective social policies and improved social protection mechanisms, with a focus on disadvantaged or vulnerable groups; strengthening the relationship between employment and social protection.

Priority 1: Employment

The main concerns relating to employment in Turkey are the low employment rates for women, young people and those from disadvantaged groups, the high level of unregistered employment, child labour, and the lack of decent jobs. The main challenges currently facing the labour market were identified in the HRD OP IPA II as being related to a number of weaknesses in the system. These are the lack of bipartite and tripartite social dialogue; the low level of collective bargaining coverage; the lack of coordination among the public institutions, social partners, NGOs and academia; insufficient awareness, legal infrastructure, enforcement and monitoring mechanisms; lack of proper health and safety conditions, especially in certain sectors and occupations; and the absence of up-to-date data on working conditions. The main areas in which action is required are: ensuring an effective linkage between the education system and the labour market, and providing more programmes and services, including improved career guidance services, more internship/apprenticeship opportunities and entrepreneurship support. The spatial and gender-based segregation of the labour market and the diversification of ALMPs as a cross-cutting challenge require particular attention.

At the policy and governance level, action is required to address particular weaknesses and gaps in capacity, including the lack of research, impact assessment, data and/or statistics, and of staff trained in labour market policies; the insufficient developed monitoring and evaluation mechanisms to support the implementation of employment policies. ISKUR cooperates on daily basis with the social partners, especially on policy design and delivery. In terms of implementation, the priorities include developing specific employment services tailored to the needs of different groups and individuals, and coordination with and enhancing the capacity of potential service providers (NGOs, municipalities, private employment agencies, etc.). A possible future focus of the capacity building actions could be

full engagement of social partners and other stakeholders into the monitoring and evaluation of policy implementation.

Key targets:

- Labour force participation rate: 53.8% by 2018 (DP10). Turkey has increased its participation rate from 49.1% in 2007 to 54.4% in 2013; hence, it appears that this target has already been achieved and needs to be revised, given that the EU rate stands at 71.9%.
- Female labour force participation rate: 41% by 2018 (DP10 and NES). The female rate increased from 25.2% in 2007 to 33.2% in 2013. Therefore, the target of 41% is feasible, but will require focused efforts.
- Employment rate: 55% by 2023 (NES). Turkey increased its employment rate from 44.6% in 2007 to 49.5% in 2013; therefore, the target of 55% is achievable, with the main focus on female employment.
- Unemployment rate: reduce to 5% by 2023 (NES). For the population aged 20–64, the annual unemployment rate fell from 8.8% in 2011 to 8.2% in 2013 as employment rose by 3.0%. This target should also be feasible, although it should be kept in mind that this may fluctuate when the labour force grows faster than employment⁷.
- Youth unemployment rate: 13% by 2018 (DP10). This rate was 17.1% in 2005 and fell to 15.8% in 2014. Therefore, this target is considered achievable.
- Unregistered employment rate: 30% by 2018 (DP10). Nearly 40% of the 25.96 million workers currently employed in Turkey are not registered with the social security system, and from 2012 to 2013 the figure fell by 2.5percentage points. This target is considered feasible, but a stronger effort to reduce this figure even further could help the employment situation as a whole.
- Long-term unemployment rate: 15% by 2023 (NES). This rate had reduced significantly in earlier years, from 38% in 2004 to 24.9% in 2012, so this target is considered achievable.

The following three broad activities are envisaged:

Activity 1.1: Promoting decent work

This activity prioritises the need to develop appropriate employment opportunities for women and young people, including teleworking for women to allow them to work from home, and new work opportunities in the different sectors identified in the National Employment Strategy (NES).

Activity 1.2: Promoting Employment and Employability

Activity 1.3: Supporting Employment Policy-making and Implementation

Here the emphasis needs to be on how to reduce unregistered employment and improve flexibility and mobility in the labour market.

Priority 2: Education and Training

If Turkey is to successfully make the leap to a more advanced, knowledge-based economy, there needs to be a strong push to provide a high-quality labour force with the appropriate skills to match

⁷ The progress on meeting the employment and unemployment target should take into consideration the increase in labour force participation mainly determined by the population growth. This might require additional actions and resources to increase the employment and reduce unemployment rate.

current and projected needs up to 2023. In anticipating and catering for these needs, the targeted and incentivised sectors of the economy, in particular manufacturing and services, are to be given priority, including energy and sustainable development sectors. The educational attainment and skills levels provided need to be improved in order to cover the range from low-tech to high-tech, addressing the technological areas identified in Vision 2023. The particular needs of industry and the specificities of regions and different societal groups, in particular women and young people, require particular attention to ensure that there is take-up of the opportunities offered, both in terms of education and training and of related jobs. While it is important to address quantitative aspects by investing in further efforts to extend physical capacity and facilities, the qualitative aspects of education need to be given higher priority. This includes continued efforts to modernise curricula, the innovative delivery of education and teacher training, provision of free textbooks in primary education, reforms to secondary education and VET, and the introduction of the Bologna Process in higher education. In addition, there needs to be a strong emphasis on addressing the inadequacy of investments and institutional capacity, and the introduction of an effective data-collection system and performance-evaluation mechanism. According to the PISA, which is one of the main indicators of educational outcomes, Turkey has improved in terms of mathematics performance and 'levels of equity in education' (PISA 2012). Nevertheless, the country is still below the Organisation for Economic Co-operation and Development (OECD) averages in the fields of mathematics, reading and science.

Key targets:

- Gross enrolment rate for pre-school enrolment (4–5 years): 70% by 2018 (DP10). The rate was 24% in 2006/07 and 44% in 2012/13. The target is considered ambitious but achievable, given progress made in earlier years, but focused efforts are required.
- Gross enrolment rate for higher education (total): 94% by 2018 (DP10). This rate has risen sharply from 46% in 2009 to 69% in 2012, suggesting that the target is feasible by 2023.
- Number of students per academic teaching staff: 36 by 2018 (DP10). This would require a reduction from 43 in 2012, a target that seems feasible.
- The emphasis of the activities needs to be on both quantitative and qualitative upscaling.
- This will require the monitoring and evaluation systems to be strengthened overall and given a more strategic role, bringing together all the players and informing new directions in policy as required, based on evidence. The introduction of innovative models for the delivery and quality of education needs to be given priority and incentivised to ensure wide take-up. The regional, sectoral and social cohesion dimension of education needs to be given greater priority.

The following three broad clusters of activities are envisaged:

Activity 2.1: Improving the Quality of Education and Training

Activity 2.2: Increasing Educational Attainment and Skill Levels by Providing Access to All

Innovative methods and models need to be encouraged, including rethinking current approaches based on experience abroad in more advanced environments. The aim is to upscale quantity and quality while reducing costs and resources.

Activity 2.3: Strengthening National Qualifications System and Promoting LLL & Adaptability

The target is to increase the proportion of adults aged 25–64 taking part in LLL from the current level of 3.2% to 8%⁸ by 2018 and to 15%⁹ by 2023.

This is an ambitious target, given that the level of participation has increased in a limited way since 2005. Achieving the target of 8% by 2018 will require very focused efforts to ensure that the schemes on offer are state-of-the-art, accessible, attractive, affordable, properly certified and fine-tuned to the needs of different stakeholders. Six priorities in the current LLL system have been identified in the LLL Strategy Paper, and action will need to be taken rapidly on all fronts. Given the scale of the challenge, and the growing population and increasing need for and frequency of LLL in the face of dynamic changes in the economy and labour market, it will be important to invest in innovative models of delivery and e-training, and increase the number of certified providers. Learning from good practices in other countries and using such examples to support the delivery of state-of-the-art training could also provide a solution for upgrading training delivery and insights on how course contents can be improved to meet new market needs.

Priority 3: Social Policy and Inclusion

A key societal challenge for Turkey is the uneven distribution of income, which leaves parts of the population vulnerable to poverty and social exclusion. This requires urgent attention and could deteriorate further up to 2023, which would have an impact on a range of other policy areas and related resources. Addressing the challenge of building an inclusive society calls for the development and upgrading of customised social protection policies and services tailored to support disadvantaged individuals, and in turn an investment in capacity building to ensure the effective roll-out and delivery of the services. This extends to, and requires coordination with, education, employment and health policies and services, and coordination between services, policies and practices to improve quality and coverage. Over time, these policies and services will require fine-tuning based on the results achieved and changing circumstances, highlighting gaps or weaknesses in the legislative and policy framework, institutional capacity, diversity and scope of services, and coordination of interventions that will need to be addressed.

Key targets:

- Proportion of the population living on less than US\$4.3 a day (absolute poverty): less than 1% by 2018. The figure has decreased gradually from 8.41% in 2007 to 2.3% in 2012; therefore, the target seems feasible.
- Percentage of individuals living in households where the total equalised household income is below 60% of the national equalised median income (relative poverty): 19% by 2018 (DP10).
- Food and non-food poverty rate: 10% by 2023. The rate was 26.96% in 2002, down to 25.6% in 2004, 25% in 2006 and 22.6% in 2012 (Balaban, 2014). The target for 2023 is ambitious, considering the incremental improvements over time. However, it is important to contextualise these figures at regional level in order to identify more localised measures.
- Gini ratio: 36% in 2018 (DP10). The ratio has decreased from 42.8% in 2006 to 40.4% in 2011. Hence, this target is feasible, although the predicted convergence with the EU is 23 years, so focused efforts are required to reduce income inequality.

Apart from the measures proposed, a more strategic approach is recommended, bringing together key players (government and NGOs) at national and regional level to co-design appropriate measures

⁸ National Lifelong Learning Strategy Paper (2014–2018)

⁹ National Employment Strategy (2014–2023)

that are fine-tuned to the profiles of particular disadvantaged groups. Foresight could be used to bring players together, to create spaces for open dialogue, and to empower disadvantaged individuals. Structures for the evaluation and monitoring of measures and results need to be introduced with a view to fine-tuning the approach and keeping track of the targets.

Activity 3.1: Capacity-building for social inclusion

Activity 3.2: Facilitating access of the disadvantaged persons to social protection services and labour market

Investing in ICT and innovation-based support services could help to reduce the burden on government and allow the faster upscaling of activities to larger groups. Measures include the following.

- supporting activities on social innovation and social entrepreneurship: this is a particularly important measure as it could help disadvantaged individuals to develop self-help schemes in local communities;
- supporting activities relating to microcredit or any other financial measures for vulnerable individuals;
- providing income support to strengthen the link between education, employment and poverty;
- supporting activities relating to service provision through NGOs and local actors;
- improving the quality of and access to guidance and counselling services;
- supporting activities relating to awareness-building, visibility and dissemination to service users;
- supporting activities to increase physical accessibility for people with disabilities;
- supporting activities for social inclusion of disadvantaged individuals such as the urban poor, Roma citizens, women exposed to violence, gifted children, street children, single-parent households, seasonal workers, lesbian, gay, bisexual and transgender individuals (LGBTs), drug addicts, children forced into crime, child victims of crime, widows with no social protection coverage), individuals with disabilities, convicts and ex-convicts, prisoners and ex-prisoners;
- supporting activities relating to childcare, elderly care and care for persons with disabilities.

Table 5: Overview of priorities and actions

Priority 1: Employment	Activity 1.1 Promoting Decent Work
	Activity 1.2 Promoting Employment and Employability
	Activity 1.3 Supporting Employment Policy-making and Implementation
Priority 2: Education and Training	Activity 2.1 Improving the Quality of Education and Training
	Activity 2.2 Increasing Educational Attainment and Skill Levels by Providing Access to All
	Activity 2.3 Strengthening National Qualifications System and Promoting LLL & Adaptability
Priority 3: Social Policy and Inclusion	Activity 3.1 Capacity-building for social inclusion
	Activity 3.2 Facilitating access of the disadvantaged persons to social protection services and labour market

3.3. The roadmap and indicators

Priority 1: Employment

An inclusive and more effective labour market that will help to reduce regional disparities; improved employment rates, especially of women, young people, and those from disadvantaged groups; promotion of quality and decent jobs

Activities	Specific objectives	Results	Actors	Indicative targets and key quantitative and qualitative indicators for employment
Activity 1.1 Promoting decent work	<p>Eligible actions:</p> <ul style="list-style-type: none"> ▪ Developing appropriate employment opportunities for women and young people; this includes teleworking for women, allowing them to work from home, and new work opportunities in the various sectors identified in the NES. ▪ Comprehensively revising legal texts and institutional frameworks to adapt them to global and EU perspectives on 'decent work'. ▪ Improving the legal and institutional infrastructure regarding decent work along all dimensions (occupational health and safety, registered employment, labour law, inspection capacity, social dialogue, collective rights, etc.). ▪ Delivering training and awareness-raising activities targeting the policy makers and practitioners in relevant public institutions. ▪ Awareness raising, vocational guidance and counselling targeting the entire population, especially employers and female and young employees. ▪ Initiating and coordinating the preparation of a Decent Work Country Programme for Turkey. ▪ Capacity building and coordination among relevant public/non-public institutions and other relevant parties. ▪ Facilitating a culture of decent work in the Turkish labour market and supporting the sustainability of relevant efforts. ▪ Supporting social partners, and public, private and civil society organisations in coordinating their activities to create multiplier/spill-over effects. ▪ Initiating and supporting multilateral and participatory monitoring mechanisms based on the voluntary involvement of public institutions, NGOs, academia and social partners. ▪ Facilitating cooperation with international organisations, especially the ILO, with a view to making use of international experience and 	Increased employment rates, improved capacity of employment services, enhanced social dialogue and higher working standards (decent work)	İŞKUR ILO SSI DG OHS Labour Inspection Board social partners KOSGEB	<p>Key national targets by 2023:</p> <ul style="list-style-type: none"> ▪ Labour force participation rate: 53.8% by 2018 (DP10) ▪ Female labour force participation rate: 41% by 2018 (DP10 and NES) ▪ Employment rate: increased to 55% by 2023 (NES) ▪ Unemployment rate: reduced to 5% by 2023 (NES) ▪ Youth unemployment rate: 13% by 2018 (DP10) ▪ Unregistered employment rate: 30% by 2018 (DP10) ▪ Job placement rate of unemployed individuals who are registered with İŞKUR: 50% by 2018 (DP10) ▪ Long-term unemployment rate: reduced from 24.9% in 2012 to 15% in 2023 (NES) ▪ Unregistered employment rate outside agriculture: reduced to below 15% in 2023 (NES) ▪ Unregistered employment in agricultural sector: reduced to 50% in 2023 (NES) ▪ Working poor rate: reduced to 5% by 2023 (NES) ▪ Worst forms of child labour: completely eradicated by 2023 (NES); this refers to heavy and dangerous work, street work and migratory/temporary seasonal work ▪ Child labour: reduced to below 2% in 2023 in other fields (NES)

Priority 1: Employment

An inclusive and more effective labour market that will help to reduce regional disparities; improved employment rates, especially of women, young people, and those from disadvantaged groups; promotion of quality and decent jobs

	<p>expertise in the field.</p> <ul style="list-style-type: none"> ▪ Supporting regional and local actions in relation to capacity building, awareness raising, local partnerships, and follow-up mechanisms, and providing grants to support individuals working in the field. 				
Activity 1.2 Promoting Employment and Employability	<p>Eligible actions:</p> <ul style="list-style-type: none"> ▪ Developing ALMPs, including training, retraining, counselling and guidance, and entrepreneurship programmes that are tailored to the needs of women, young people and those from disadvantaged groups. ▪ Organising awareness-raising and communication campaigns. ▪ Supporting institutional capacity building for relevant actors. 				
Activity 1.3 Supporting Employment Policy-making and Implementation	<p>Eligible actions:</p> <ul style="list-style-type: none"> ▪ Reducing unregistered employment ▪ Improving labour market flexibility and mobility ▪ Supporting the policy-making and policy-implementation capacities of relevant actors through training, consultancy, and learning about best practices ▪ Improving the institutional capacities and participation of relevant partners, as well as links with academia ▪ Strengthening human resources through training and professional/specialist support ▪ Enhancing the connection between policy makers and academia and providing input for policy makers in the form of research and studies ▪ Conducting impact assessments of current policies ▪ Improving monitoring and evaluation mechanisms to support the implementation of a comprehensive employment policy ▪ Strengthening institutional capacities and promoting the participation levels of social partners in the policy-making process ▪ Supporting İŞKUR and other potential service providers with a 				
				<p>HRD OP targets and indicators by 2020:</p> <ul style="list-style-type: none"> ▪ Proportion of participants who take part in decent-work-related activities or are registered with İŞKUR or SSI ▪ Rate of occupational accidents in SMEs accessed under SOP ▪ Number of working children identified ▪ Mechanism to monitor and follow up on decent work established and operational ▪ Number of individuals who participate in labour force/are employed after SOP intervention ▪ Number of women, young people and those from disadvantaged groups supported for employability ▪ Proportion of individuals in employment after support for job creation/ entrepreneurship under SOP ▪ Number of new ALMPs and/or other tailored services developed ▪ Number of end beneficiaries from new ALMPs and/or other tailored services developed ▪ Number of individuals who benefit from/ participate in employment services after SOP intervention 	

Priority 1: Employment

An inclusive and more effective labour market that will help to reduce regional disparities; improved employment rates, especially of women, young people, and those from disadvantaged groups; promotion of quality and decent jobs

	<p>view to diversifying the services according to the needs of different groups and individuals</p> <ul style="list-style-type: none">▪ Increasing the institutional capacities of relevant institutions▪ Supporting the emergence of new and additional actors (NGOs, municipalities, private employment agencies, etc.) in the field of employment services provision			
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Priority 2: Education and Training

Improving educational attainment and skills levels by investing in people and institutions

Activities	Specific objectives	Results	Actors	Indicative targets and key quantitative and qualitative indicators for employment
Activity 2.1 Improving the Quality of Education and Training	<p>Eligible Interventions:</p> <ul style="list-style-type: none"> Supporting quality development systems and mechanisms for all levels of education, particularly for VET according to European Quality Assurance in VET (EQAVET) principles Strengthening the monitoring and evaluation systems for all educational actors, especially on the implementation of education policies, student and teacher performance, etc. Providing support for the implementation of innovative models to increase the quality of the education system Developing models for improving soft skills, alongside academic knowledge, of students, including outdoor learning, sports, artistic and intellectual skills, and foreign languages Providing support to decrease the disparities in success rates between regions and school types Improving the quality of formal and non-formal education programmes Establishing a new system for teacher professional development Improving cooperation between teacher-training institutions and all educational actors to support pre-service teacher training Supporting IT-based services, including e-learning, distance learning and mobile learning services Strengthening guidance and counselling services at all educational levels Supporting graduates to achieve a better transition from education to the labour market Providing more efficient and productive workplace-based training Initiating and coordinating the preparation of a Decent Work Country Programme for Turkey. Capacity building and coordination among relevant public/non-public institutions and other relevant parties. Facilitating a culture of decent work in the Turkish labour market 	Increased educational attainment levels, higher quality of education, and improved LLL mechanisms and participation	MoNE TOBB	<p>Key national targets by 2023:</p> <ul style="list-style-type: none"> Participation in LLL: increased from 3.2% in 2013 to 15% by 2023 (NES) Gross enrolment rate for pre-school enrolment (4–5 years): 70% by 2018 (DP10) Gross enrolment rate for higher education (total): 94% by 2018 (DP10) Number of students per member of academic teaching staff: 36 by 2018 (DP10) Number of provinces in which there are 30 or fewer students per classroom in primary education: 76 by 2018 (DP10) Number of provinces in which there are 30 or fewer students per classroom in secondary education: 66 by 2018 (DP10) Proportion of workers in the construction sector with a vocational qualification certificate: 30% by 2023 (NES) <p>HRD OP targets and indicators by 2020</p> <ul style="list-style-type: none"> Minimum of 100 000 students registered/benefited (from guidance and counselling services) Quality assurance system for all levels of education and training established and operational Modular system and relevant certification based on European Credit System for VET (ECVET) and European Credit Transfer and Accumulation System (ECTS) principles operational Minimum 50% of credited VET modules are implemented Number of those not in education, employment or

Priority 2: Education and Training

Improving educational attainment and skills levels by investing in people and institutions

	<p>and supporting the sustainability of relevant efforts.</p> <ul style="list-style-type: none"> ▪ Supporting social partners, and public, private and civil society organisations in coordinating their activities to create multiplier/spill-over effects. ▪ Initiating and supporting multilateral and participatory monitoring mechanisms based on the voluntary involvement of public institutions, NGOs, academia and social partners. ▪ Facilitating cooperation with international organisations, especially the ILO, with a view to making use of international experience and expertise in the field. ▪ Supporting regional and local actions in relation to capacity building, awareness raising, local partnerships, and follow-up mechanisms, and providing grants to support individuals working in the field. 			<p>training (NEET) participating in education, training or employment after HRD Operational Programme intervention</p> <ul style="list-style-type: none"> ▪ Proportion of individuals returning to education or training after SOP intervention ▪ Number of students supported ▪ Number of ECE facilities supported/ established through SOP intervention ▪ System for RPL established and operational ▪ Guidance and counselling system for LLL established and operational ▪ Data collection and management information system (MIS) for LLL established and operational ▪ Number of persons supported in the context of LLL and adaptability ▪ Number of SMEs supported in terms of adaptability
<p>Activity 2.2 Increasing Educational Attainment and Skill Levels by Providing Access to All</p>	<p>Eligible interventions:</p> <ul style="list-style-type: none"> ▪ Identifying students at risk of absenteeism and early school leaving and retaining them through developed intervention models ▪ Increasing family–school cooperation ▪ Supporting attendance- and performance-monitoring systems for students ▪ Supporting second-chance activities ▪ Improving the institutional and staff capacity of the relevant educational institutions ▪ Supporting awareness-raising activities to encourage participation in education ▪ Improving the educational environment of schools ▪ Improving opportunities for increased access for groups that require a special focus ▪ Improving the quality of and access to psychological guidance and counselling ▪ Increasing the quality of pre-school education and nursery services through innovative methods, and improving service delivery 			

Priority 2: Education and Training

Improving educational attainment and skills levels by investing in people and institutions

	<ul style="list-style-type: none"> Improving the participation of universities, NGOs, local administrations and other relevant institutions related to the United National Economic Commission for Europe UNECE; this action could be linked to the following measures to give it focus: <ul style="list-style-type: none"> ✓ Revising programmes and materials and developing new materials for the ECE ✓ Increasing the capacities of ECE teachers, administrators and other staff ✓ Improving standards of ECE institutions with relevant monitoring and evaluation systems ✓ Increasing awareness of the importance and necessity of the ECE 			
Activity 2.3 Strengthening National Qualifications System and Promoting LLL & Adaptability	<p>Eligible interventions:</p> <ul style="list-style-type: none"> Revising and developing LLL programmes in line with new innovative methods relating to the EU's perspective on LLL, key competencies and basic skills Developing and implementing innovative models to facilitate access to LLL opportunities Using foresight to strengthen linkages and cooperation among all parties, particularly educational institutions, the labour market and stakeholders; it is important to involve stakeholders (firms, industry representative bodies, young people, women, individuals from disadvantaged groups) in the co-design of LLL courses Exploring further the regional and sectoral dimensions of LLL and addressing these through dedicated foresight actions focusing on local priorities and opportunities linked to smart specialisation 			

Priority 3: Social Policy and inclusion

Building an inclusive society through effective social policies and improved social protection mechanisms with a focus on disadvantaged or vulnerable groups; strengthening the relationship between employment and social protection

Activities	Specific objectives	Results	Actors	Indicative targets and key quantitative and qualitative indicators for employment
Activity 3.1 Capacity-building for social inclusion	Eligible actions: <ul style="list-style-type: none"> ▪ Providing assistance for policy making and policy evaluation at central and local level ▪ Improving policy implementation and coordination among service providers ▪ Improving the administrative registration system, IT infrastructure and software development for service providers ▪ Establishing mediating mechanisms between service providers and service receivers ▪ Promoting research, surveys, studies and impact-assessment analysis on social policies ▪ Establishing a governance model for social policies ▪ Strengthening the capacity of NGOs and local actors ▪ Providing training (including on-the-job training), study visits and internships to the service providers ▪ Supporting activities to build awareness and visibility of social services ▪ Implementing foresight actions to empower unemployed people ▪ Developing innovative policies/measures to help reduce income inequalities, using examples from other countries ▪ Introducing monitoring and evaluation measures 	Increased number benefiting from social/public services; higher number of disadvantaged people in economic (employment) or in social life; increased capacity in terms of policy making and implementation	MoFSP, local administrations and municipalities	Key national targets by 2023: <ul style="list-style-type: none"> ▪ Share of the population living on less than US\$4.3 a day (absolute poverty): below 1% by 2018 (DP10) ▪ Percentage of individuals living in households where the total equalised household income is below 60% of the national equalised median income (relative poverty): 19% by 2018 (DP10) ▪ Gini ratio: 36% by 2018 (DP10) ▪ Poverty (food and non-food): permanently reduced below 10% by 2023 (Strategic Plan of the MoFSP) ▪ Worst forms of child labour: completely eradicated by 2023; this refers to heavy and dangerous work, street work and migratory/temporary seasonal work (NES) ▪ Child labour: reduced to below 2% by 2023 in other fields (NES) HRD OP targets and indicators by 2020: <ul style="list-style-type: none"> ▪ + 4 000 000 disadvantaged individuals registered on relevant databases ▪ + 1 000 000 disadvantaged individuals benefiting from relevant services ▪ Basic family-assistance system established ▪ Risk-based management system established ▪ Action plan of the MoFSP revised/adopted ▪ Social protection service programme revised
Activity 3.2 Facilitating access of the disadvantaged persons to social protection services and labour market	Eligible actions: <ul style="list-style-type: none"> ▪ Investing in ICT and innovation-based support services ▪ Supporting activities on social innovation and social entrepreneurship; this is a particularly important measure as it could help disadvantaged individuals to develop self-help schemes in local communities ▪ Supporting activities relating to microcredit or any other financial 			

Priority 3: Social Policy and inclusion

Building an inclusive society through effective social policies and improved social protection mechanisms with a focus on disadvantaged or vulnerable groups; strengthening the relationship between employment and social protection

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| | <p>means for vulnerable persons</p> <ul style="list-style-type: none">▪ Providing income support to strengthen the link between education, employment and poverty▪ Supporting activities relating to service provision through NGOs and local actors▪ Improving the quality of and access to guidance and counselling services▪ Supporting activities relating to awareness-building, visibility and dissemination to service users▪ Supporting activities to increase physical accessibility for people with disabilities▪ Supporting activities for the social inclusion of disadvantaged individuals such as the urban poor, Roma citizens, women exposed to violence, gifted children, street children, single-parent households, seasonal workers, LGBT individuals, drug addicts, children forced into crime, child victims of crime, widows without no social protection coverage, individuals with disabilities, offenders and ex-offenders, prisoners and ex-prisoners▪ Supporting activities relating to childcare, elderly care and care for persons with disabilities | | | |
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PART II – REVIEW OF INSTITUTIONAL ARRANGEMENTS: THE CAPACITY-DEVELOPMENT PLAN TO ACHIEVE SKILLS VISION 2020

1. The RIA approach and process

A Review of Institutional Arrangements (RIA) plays an important role in strengthening capacity for better institutional performance, specifically for the planning of IPA II, for a number of stakeholders. On the one hand, national institutions (managing authorities, in the case of candidate countries, line ministries and National IPA Coordinators (NIPACs) have an interest in the review. They are assessed by IPA programming absorption rates and, in the longer term, by the overall quality, impact and sustainability of the actions funded by IPA. On the other hand, European Commission services and Delegations also have an interest and should be involved, at least in a consultative or advisory role, since reviews and capacity-development actions will have a direct impact on the ability of beneficiaries to apply for and effectively utilise IPA funds. Moreover, it is possible to use IPA funding to address capacity gaps that are identified through the review process.

The RIA component complements the foresight component, by reviewing institutional arrangements in the HRD sector. The key assessment question for the RIA component is:

What are the capacity needs of institutions to enable them to achieve Skills Vision 2020?

This includes the institutional capacity to manage the policy cycle – including planning, implementation and monitoring – and the capability to use foresight as a forward-looking policy-making approach. The review also includes a section on ‘budget planning and execution capacities’, linked to the capacity of institutions to work within a medium-term expenditure framework (MTEF) and, more specifically, the effectiveness and efficiency of institutional arrangements to deliver and contribute to sound policies in the area of HRD.

The review aims to identify the necessary institutional arrangements for achieving the shared skills vision and roadmap by 2020.

2. Overview of the HRD sector in Turkey: key actors involved

From the skills development perspective, the MoNE is one of the key actors in terms of the planning and delivery of education and training in Turkey. From an institutional and organisational perspective, the MoNE covers the following areas: basic education, secondary education, VTE, religious education, special education and counselling services, LLL, special education institutions, innovation and educational technologies, teacher training and development, the EU and foreign relations, guidance and control, internal audit unit, strategy development, support services, and group presidency of the Information Technology, Construction & Real Estate Group.

Owing to the level of complexity of the Turkish national education system, the MoNE undertakes its work through a number of important structures that have role in the functioning of the system, namely:

- Confederation of Turkish Tradesmen and Craftsmen (especially in VTE) (TESK);
- Union of Chambers and Commodity Exchanges of Turkey (TOBB);
- workers’ and employers’ associations (mainly TISK, HAK-İŞ, TURK-IS);
- cooperation between schools, businesses and NGOs;

- national qualifications system certification, through the VQA established in 2006 for improving the quality of VTE;
- TÜBİTAK in general education.

The MoLSS coordinates the HRD sector from the perspective of EU investments in employment, education and training and social policies. It has been appointed the national authority responsible for the IPA HRD OP components. The ministry's EU Coordination Department is in charge of the management of IPA and EU Affairs through a special EU Affairs unit. In order to respond to a more effective and integrated approach of IPA HRD OP implementation, the Monitoring and Evaluation Unit was combined with Programme Management Unit and named Programme Management, Monitoring and Evaluation Unit in 2012. A Grant Unit has been established too in 2014. The department carries out the following duties associated with the IPA management tasks:

- Programme Management
- Procurement
- Project Management
- Financial Management
- Quality Assurance and Control
- Information, Publicity and Technical Assistance
- Monitoring and Evaluation.

The duties of each unit are available on the ministry website¹⁰.

The MoLSS's IPA management department works closely with İŞKUR within the framework of the HRD OP. Since 2007, İŞKUR has published detailed and well-formulated annual labour market analysis reports. However, the reports are in Turkish only, though reports covering the 2007–2011 period are available from the İŞKUR website¹¹.

IPA is coordinated by the NIPAC in the Ministry of EU Affairs. The tasks include the general coordination of the whole set of IPA components, and programming, monitoring and assessment of these different IPA components.

The priority sector of HRD (one of the five funding priorities of IPA II) is the education, employment and social policy cluster, with the following sub-fields:

- Education and HRD;
- Employment and the Labour market;
- Social policies and inclusion.

This links closely with the target sector of the FRAME project, and the ministries responsible are the MoLSS, MoF and MoFSP.

There are five main institutions responsible for governance of the HRD System of Turkey, namely MoNE, YÖK, İŞKUR, VQA and municipalities, with the MoNE having by far the largest role. The governance of HRD is heavily supported by SSI, MoFSP, municipalities, employers, unions and chambers, who have contributed actively in councils, boards and committees in all parts of the HRD system.

¹⁰ <http://ikg.gov.tr/en-us/aboutus/eucoordinationdepartment.aspx>

¹¹ <http://iskur.gov.tr/kurumsalbilgi/raporlar.aspx#dltop>

3. Review of institutional arrangements: key findings

3.1 Brief description of the review focus

The desk-based review focused on collecting and interpreting experiences drawn from several sources on the institutional arrangements for HRD in Turkey. It had four main target areas:

- Inter-ministerial coordination and stakeholder engagement;
- policy design;
- policy implementation;
- policy monitoring and evaluation.

The aim was to elucidate gaps, drawbacks and challenges that still exist in the institutional arrangements, with a view to allowing optimal realisation of the vision and roadmap.

3.2 Key findings on capacities in HRD

3.2.1 Inter-ministerial coordination and stakeholder engagement

Main findings

The Turkish parliamentary system has a long tradition of stakeholder involvement in HRD, especially from national employers, trades and crafts, as well as labour unions. Representative committees, working groups and councils exist in various areas of responsibility of the MoLSS, the MoNE, VQA, and other bodies.

According to the most recent SIGMA report (2012), public bodies traditionally lead the strategic planning and management of education and training, often with decision making concentrated in central government, with tasks or resources devolved to regional or local authorities. However, these tasks are not always clearly defined. In addition, responsibilities for different aspects of education and training are split between various ministries, departments and agencies. Coordination between government institutions with responsibility for education and those with responsibility for employment, social and economic development and financing remains constrained. Schools are often owned, managed and run by central authorities. Multilevel governance approaches are needed if HRD is to meet the specific needs of local communities and labour markets.

The SIGMA report points to the need for further support for a robust level of capacity and skills in ministries to develop a modernised human resources management system coupled with an adequate staff information system. A key approach highlighted in the Ninth Development Plan is the development of coordinating (inter-ministerial and stakeholder) mechanisms to support the extension of formal and non-formal educational opportunities; to strengthen horizontal and vertical links between different types of education; to structure apprenticeship and public education to move towards these types of education; and to support the involvement of the private sector and NGOs in this area.

A key challenge outlined in the Lifelong Learning Strategies for 2009–2013 and 2014–2018 derives from the level of diversity in the LLL system, and therefore the extent to which the system is fragmented and weakly coordinated. Some progress has been made in working towards improved coordination. However, during consultations to develop the draft Lifelong Learning Coordination Law (Policy Paper, 2013); stakeholders agreed that the LLL system still lacks inter-institutional coordination. This leads to inefficiencies, with overlaps in some types of provision and gaps in others. Stakeholders agreed that the capacity and quality of the LLL system could be enhanced by improving the level of coordination between organisations and institutions involved in LLL in Turkey.

LLL in Turkey is currently financed by contributions from the state, the private sector and individuals. Individuals finance LLL directly by paying their own costs for education or training, and also indirectly through trade union membership fees, through payments for unemployment insurance, and through donations to charitable foundations. Financing of the system is disbursed through multiple institutions, reflecting the diverse nature of adult learning. For example, public funding to LLL is provided through at least five different ministries (MoNE, MoLSS, Ministry of Science, Industry and Technology (MoSIT), MoD, Ministry of Food, Agriculture and Livestock (MoFAL)) and, in addition, through the municipalities. Many employers finance training for their employees and also contribute to LLL through their contributions to the training funds of employers' associations, including compulsory contributions to TOBB and TESK. The current financing system for LLL is therefore complex, with multiple agencies involved.

The World Bank's 'Performance-based Budgeting and Medium Term Expenditure Frameworks in Emerging Europe' (2009) focuses on the fact that improving public management culture requires time and effort. This cultural change is in the development stage in Turkey. In order to spread these reforms to all public administrations and ensure their sound implementation, progress is needed in line with the World Bank report, in areas such as developing human resources through training, workshops and seminars. Increasing administrative capacity and support from senior management is also critical for successful implementation.

Civil service reform is necessary to improve public management performance culture. Such reform should go hand in hand with performance-based budgeting (PBB), particularly with regard to assessing and rewarding personal performance. Turkey needs to consider shifting from lifelong employment to more fixed-term, contract-based work. Trade unions, staff representatives and NGOs need to be engaged in the process if the whole reform process is not to be undermined.

Effective application of public finance management reforms demands greater capacity. Experience indicates that the Ministry of Finance (MoF) needs to invest more in building staff capacity for evaluating line ministries' strategies and budget requests, developing a methodology for programme- and performance-based budgeting, and using performance information effectively in the budget process. The use of performance information in decision making and budgeting allocations is recommended.

An example of forward-looking inter-ministerial cooperation and stakeholder engagement (World Bank, 2013d) is the active labour market policy, whose main role is to ease transition on the labour market during recovery periods and beyond by addressing barriers to employment (e.g. information and skills). Efforts to expand and improve ALMPs following the economic crisis are likely to contribute to job creation. The coverage of ALMPs has continued to expand, mainly in the area of vocational training. According to İSKUR data, the participation in training courses reached 144,393 participants in 2011.

As part of this effort, the Specialised Vocational Training Centres Project (UMEM) was introduced in 2010. The UMEM is a partnership between İŞKUR, the MoNE and the TOBB ETU University to provide vocational training in vocational and technical high schools and internships in TOBB businesses. National Vocational Qualification System which links curricula and qualifications in vocational fields with occupational needs continues to be developed. Training providers are now selected on the basis of specific quality and performance criteria, rather than on cost alone.

Challenges for interministerial coordination

- to establish appropriate coordination structures for HRD that are demand-driven and based on the needs of the clients, and that could directly benefit the users of the system;
- to establish meaningful and motivating routines of work in inter-ministerial and stakeholder coordination forums that are based on the fulfilment of specific performance criteria and matching remuneration;
- to build and extend local forums for HRD.

3.2.2 Policy design

Main findings

Management and access to statistics, long-term planning options

The İŞKUR registers contain information on occupational and regional vacancies that is useful for identifying short-term skills needs. İŞKUR collects and organises data from job seekers and employers. The register comprises 800 000 entries, one-third of the country's unemployed population. Educational attainment and skills are listed. The limitations of the data for forecasting purposes are:

- the one-year time horizon is the maximum duration of unemployment benefits;
- unemployment insurance criteria are strict for Turkey, where about half of the workforce is not registered, thus rendering the register a biased sample of the workforce;
- college graduates would not typically register with İŞKUR; registered persons and vacancies would for the most part be blue-collar.

However, the data are continuously updated and accessible. For example, in 2013, the IPTA survey was implemented and covered 112,000 companies with 10+ employees.

On the İŞKUR website¹², an increasing number of first-time job seekers list themselves; the data will become more reliable for anticipating trends. It is important to note that İŞKUR has evolved from a government agency that was set up to manage the mass labour migration to Germany in the 1960s and 1970s, and there is still a perception that it focuses on low-skilled work. College graduates use other networks, including head-hunting firms. İŞKUR regional offices respond to local training needs identified through the registers. The TURKSTAT monthly labour force survey, the only national source of data on employment and labour force participation, produces timely labour market data, and since 2004 has included a question on monthly net income. Its strengths are its time horizon, which is continuous and current; its national/regional (NUTS 2) level representation, with 24 000 households; and its coverage of all sectors. Centred moving average reporting allows results to be available with a three-month lag. However, it is a general survey, and there is no specific occupational or skills focus in the standard survey.

According to a report by the European Employment Observatory (EEO, 2008), there are two instruments that may provide a basis for labour market forecasting at the national level, namely the İŞKUR registers and the TURKSTAT monthly labour force survey. Neither of these instruments is fit for purpose.

¹² [http:// www.iskur.gov.tr](http://www.iskur.gov.tr)

The challenges are the management and accessibility of statistics and long-term planning tools relating to:

- collection of data;
- reliability of data for anticipating labour market and skills requirements to 2020;
- the way that existing data may be used at national level.

Mechanisms for linking strategic and action planning

Turkey has many regional and local public administration bodies and boards that are active in the design and implementation of central policies at regional and local levels. The government's Development Plan sets out specific Employment Pacts, and the Regional Development Agencies, which were legally established in early 2006, coordinate work under these formalised Pacts through agreements with local and regional governments, employers' associations and trade unions, political groups, community-based organisations and NGOs.

The HRD system suffers from a deficit of information on short- and longer-term skills needs and shortages in the economy, and while individual ministries have developed a strategy, they are generally still weak in the formulation of SMART objectives, and in monitoring and learning from results in the medium to long term.

The SIGMA report (2012) findings point to a further need to enhance central capacity for public service policy design and implementation. To some extent, the administrative culture seems to be regarded as formalistic, hierarchical and centralised. The administration appears to be fragmented leading to risks of inefficiency in governance is identified as the second most problematic factor for doing business in Turkey. These challenges are considered to hamper the continuous adaptation to the new needs of a rapidly evolving, dynamic Turkish society. The Tenth Development Plan represents a new, comprehensive approach to the country's growth through combining a whole set of strategies on several levels. Under three main topics – stable economic growth, high quality of human capital and liveable space – subtopics are integrated in relation to the macroeconomic framework, sectoral policies (agriculture, industry, transport, energy, tourism, education, health and environment), social policies (income distribution, disadvantaged groups), regional development policies and public administration (efficiency in public services, governance and strategic management).

Challenges in policy design

The two data-source institutions mentioned – İŞKUR and TURKSTAT – are not suitably equipped to provide a timely response to the immediate needs of the labour market and dynamic HRD at local level. Instruments of a simpler sample nature should be developed and used by local HRD partnerships.

Although strategic planning is widespread and of high quality, the link to action planning and monitoring of results is often lacking. This could be overcome by introducing a closer dialogue with the clients and users of the public HRD system. A policy-design approach that is demand-led and closely linked with quality assurance would be a solution for the current formalistic, strongly hierarchical and authoritarian strategic planning process.

3.2.3 Financial planning and budgeting

Main findings

Planning and budgeting frameworks and tools supporting the designed policies

According to the National LLL Strategy 2014–2018, LLL in Turkey is currently financed by contributions from the state, the private sector and individuals. Individuals finance LLL directly when paying their own education or training costs, and also indirectly through trade union membership fees,

unemployment insurance payments and donations to charitable foundations. Financing of the system is disbursed through multiple institutions, reflecting the diverse nature of adult learning. Public funding for LLL is provided through at least five different ministries (MoNE, MoLSS, MoSIT, MoD, MoFAL) and, in addition, through the municipalities. Many employers finance training for their employees, and also contribute to LLL through contributions to the training funds of employers' associations, including compulsory contributions to TOBB and TESK.

The current financing system for LLL is therefore complex, with multiple agencies involved. The LLL Policy Paper concludes that a national system of LLL must be funded from a range of sources. It identifies the lack of coordination of the adult non-formal learning system as one of the gaps in the institutional arrangements for LLL, and highlights the need for this in strategic planning and financing (to improve the efficiency and impact of the system) as well as in monitoring and evaluation (including improving data and reporting on LLL system performance).

The LLL Policy Paper distinguishes between three types of financing systems:

- financing required to establish and run the proposed new structures that will be responsible for coordinating the LLL system (e.g. staffing costs, travel costs, overheads such as water, lighting, etc.);
- financing for programmes of work supported or initiated by the new structures (e.g. training in RPL and monitoring and evaluation; developing action plans, awareness-raising campaigns, voucher schemes targeting specific groups of learners, etc.);
- financing mechanisms to promote LLL and to steer the system as a whole towards national priorities (mechanisms to stimulate public, private and individuals' funding for LLL, e.g. tax incentives, public sector budget for education, laws that require associations to allocate funds to training, etc.).

Although it is suggested that the MoNE finances the first two of these, the implementation of the action plan is seen in a broader perspective of multiple financing sources. The aim should be to complement İŞKUR services for registered unemployed individuals rather than creating competition between the two ministries in an LLL context. Grants or vouchers could play a significant role in attracting specific target groups and incentivising their participation in LLL. As recommended in the LLL Policy Paper, such grants and vouchers could be financed from the MoNE budget and other public funds in those cases where the target group for training matches the purpose of the fund. In the case of joint initiatives, the vouchers could be co-funded by the public sector and social partners. In the event of a training fund being established in the future, vouchers could be funded through this.

Turkey's Medium-Term Plan (2013–2015), run by the MoD, points to the need to develop alternative financing models at all levels of education, and indicates that educational investments by the private sector will be encouraged by focusing on quality. This is further explored in 'Performance-Based Budgeting and Medium Term Expenditure Frameworks in Emerging Europe' (World Bank, 2009), which focuses on Turkey, among other countries. Civil society plays a minor role in budgetary decisions, although there is growing interest in budgetary issues and monitoring. There is no tradition of public participation in the budgeting processes, as these are seen to be very complex and to require considerable insight. However, NGOs are now becoming increasingly interested in playing a role in public financial budgeting.

The Public Financial Management and Control Law of 2003 provided a new framework for a more modern approach to public expenditure management and accountability. One of the objectives of the new law was to provide improved transparency by introducing PBB as part of strategic management. This involves:

- linking plans and policies with the budgets;
- initiating institutional strategic plans and performance budgets;
- introducing a medium-term fiscal framework into the budgeting process.

The law strengthens the link between the responsibilities of officials and politicians and their accountability to the public. It also improves public expenditure and financial management processes in line with international practices. A number of systemic reforms have been implemented to support these new management concepts. These include a Government Financial Statistics (GFS)-compliant budget classification, an online budget MIS, an online networked accounting system for central government, and an IT-based tax-management system. Reforms in this area have aimed for sustainable fiscal adjustment as well as greater budgetary transparency. Lack of these elements is regarded as the ultimate cause of the crisis. Lack of awareness and limited commitment in public administration has hindered reform management. However, through the organisation of training events, seminars and information meetings during the reform process, the new methods and structures gradually introduced by the reform have been adopted.

Budget reforms have been introduced mainly within the MoF, SPO and the Treasury. Spending units were usually taken on board after legislation had been passed, which created a feeling of isolation and made the internalisation of the reforms by others difficult. But it has been observed that other departments have felt obliged to adopt the new institutional arrangements, for two main reasons. Firstly, many reform areas (strategic planning, multiyear budgeting, internal control and audit) were made legally binding. Secondly, departments have found strategic planning exercises to be a useful way to improve and/or advance their institutional identity. Training sessions and seminars have facilitated the process. In order to spread the reforms to all public administrations, and ensure their sound implementation, progress is needed in areas such as developing human resources, through training, workshops and seminars. Increasing administrative capacity and support from senior management is also critical for successful implementation. Civil service reform is necessary to improve public management performance culture. Civil service reform should go hand in hand with performance-based budgeting (PBB), particularly with regard to assessing and rewarding personal performance.

Challenges in financial planning

These are as follows:

- the need for main providers of HRD to team up to allow a closer linking of strategic planning and financial planning, leading to greater efficiency and better targeting of key priority areas;
- the need to link performance management in HRD with financial planning;
- the need to map all forms of financing in HRD and identifying alternative ways of financing HRD activities.

3.2.4 Implementation

Main findings

Manage and implement appropriate policy responses to skills needs

The Turkish government has developed several diverse institutions, but it is unclear how these will work coherently to support measures to promote employment in the labour market. Coordination between the institutions and efficient use of public resources targeting the neediest people could be areas for further improvement. Some of these institutions appear to be completely or partially dependent on international donor projects and have not yet identified their place in the market. The main institution, İŞKUR, has extended its service coverage by employment a great number of staff¹³. To achieve its objectives and to enhance its impact on the targeted groups, the skills of the newly hired staff require further upgrading to match the challenges and needs of the labour market.

understaffed and in need of further development; it has faced considerable challenges in dealing with labour market issues in a consistent manner, and will need extensive capacity building if it is to cope with such issues, including active labour market programmes.

Turkish PESs are poorly equipped compared with EU peer organisations owing to shortages of both financial and human resources. The standards of service required from PESs by the flexicurity approach call for highly qualified staff with the skills to collect and use advanced labour market information and administer relationships with different partners and stakeholders. Current staff numbers and levels of capacity are too low to cater for the diverse roles foreseen for PESs, and for ALMPs in particular. Targeting is very basic, and no specific measures are in place to enable women or those from other vulnerable groups to enter employment (apart from selected initiatives for disabled individuals or ex-offenders, and donor-funded pilot projects to enhance the employability of women). Recent EU-funded initiatives to raise awareness of access to and equity in the labour market have been introduced, but the İŞKUR-implemented measures are not necessarily designed to improve the situation. The PESs' relations with the demand side (employers) are limited due to the relatively low scale of PESs activities and the extent of the informal sector, although contacts and interaction with employers officially form part of the PESs' remit.

The dialogue between the HRD policy design authorities, the implementing agencies and the NGOs has a strong national basis in Turkey, and is now in the process of being established in the regions and at local level across the country. Turkey has a number of advisory and consultative bodies for official representation of social partners and the government at national level, including various bipartite and tripartite mechanisms for social dialogue. These mechanisms include the Economic and Social Council (established in 2001), Tripartite Consultation Board (established in 2003), Work Assembly, Supreme Arbitration Board, Minimum Wage Determination Board, Apprenticeship and Vocational-Technical Training Council, National Occupational Health and Safety Council, Labour Market Information and Consultation Board, managing boards of the İŞKUR Unemployment Insurance Fund, the VQA and the SSI. These established institutions provide openings for dialogue and discussion between social partners and the government, but the efficiency of this dialogue and the amount of effective cooperation outcomes are debatable.

The Provincial Employment Board of İŞKUR and the MoNE Provincial Vocational Training Board are organised into 81 provincial directorates at national level, which provide the most significant dialogue mechanisms at the local level. In 2008 the two boards were merged into the Provincial Employment and Vocational Training Board (PEVTB) in order to improve effectiveness and efficiency in relation to vocational training and employment at provincial level.

¹³ 4000 additional job and vocational counsellors were recruited in 2012-2013. Out of which, 3840 are active in the ground.

The Turkish National VET and LLL Strategies *identify* a series of challenges in the current provision of VET in Turkey in terms of HRD implementation. This comprehensive list relates to areas such as awareness raising and access to HRD, quality assurance of courses, transparency of qualifications and vertical and horizontal transfer between different parts of the HRD system/TQF, lack of capacity in the system for increasing provision to respond to demand, difficulties in providing homogeneous standards across qualifications, the lack of an efficient guidance and career counselling system, the lack of active involvement on the part of NGOs and related sectors in the provision of VET, and insufficient cooperation between institutions responsible for vocational and technical training. Compared with international standards, VET in Turkey has a centralised structure and is therefore weak in its ability to adapt to market and local needs and to technological change. Other deficiencies relate to the fact that there is no management model in schools that would allow common decisions to be taken by all the partners. The proportion of private vocational and technical schools is very low, and there is no system for monitoring and evaluating the educational system in these schools. Links between Turkey and other countries in the VET area are limited and, as a result, new projects are not being developed. The effect of the lack of quality in VET and career guidance facilities is to lower Turkey's competitive power in technology and economics.

Challenges relating to implementation

There are many challenges facing the institutional arrangements for HRD policy implementation – too many to list here. From the perspective of conforming to an EU HRD policy, the following challenges exist in the Turkish HRD system.

- Education and training is the key to employment security, but not all sections of the population have equal access to good-quality education. Illiteracy still exists among a substantial part of the population, in particular women. An overwhelming majority of employed individuals have only primary-level education, with little possibility of further training.
- Although there is a long history of social partners' engagement in HRD, this has never been formalised to allow social partners to have a significant influence on policy implementation. The established institutions provide openings for dialogue and discussion between social partners and the government, but the efficiency of this dialogue and the amount of effective cooperation outcomes are debatable due also to the lack of the implementation capacity of the social partners. As a result, the HRD system suffers from a lack of relevance and a limited ability to respond dynamically to the needs of the labour market. Structures such as sector committees, regional councils and local boards of education/training have been established, but the lack of a specific remit or dynamic process for identifying their own spheres of work mean they struggle with inefficient and demotivated work and meeting practices.
- Informal ties and links may exist between delivery institutions and local partners and stakeholders, but further development of the relationship is hindered by the lack of reliable data and information and by bureaucratic and formal ties to governing bodies. It is difficult for an entrepreneurial and innovative dimension to HRD to develop in this climate.
- Recommendations point to the need for more autonomy to be given to local authorities in the field of VET implementation. If schools were given more responsibility for education through the empowerment of school directors and local councils, their collaborations with industry in the surrounding area would increase and improve considerably.

3.2.5 Monitoring and evaluation, including reporting and learning

Main findings

Mechanisms and guidelines for monitoring and evaluation and reporting

The recent World Bank report 'Evaluating the impact of İŞKUR's vocational training programs' (2013c) sets out a methodology for measuring the impact of programme delivery in a state-governed institution. The study makes use of an experimental design to evaluate the impact of general vocational training courses provided by İŞKUR at a particular point in time. The evaluation focuses on courses that were oversubscribed, running between October and December 2010, and completed by June 2011. The evaluation was designed to answer the following main questions:

- What is the average impact of training on employment?
- Which trainees benefit the most from training?
- What are the channels through which training affects employment?
- What types of training have the greatest impact on employment?

One of the significant conclusions of the impact study is that İŞKUR courses organised by private providers, who are in competition with one another, have a significant impact on employment, whereas courses organised by public providers have an insignificant impact. The median course length is 320 hours, which does represent a sufficient number of hours to enable learning to take place. Longer courses have less impact on employment than shorter courses (although the difference is small). One possible explanation is that individuals spend less time in searching for a job when they participate in longer training courses, as they have less time available for job-search activities. Having more experienced or educated trainers does not seem to matter, which may indicate that teacher education and experience account for very limited actual variation in teacher effectiveness. Both private provision and competition yield higher impacts.

In order to respond to the needs, İSKUR has established the Regulation on Active Labour Services was adopted in March 2013.

The SIGMA report (2012) identifies a number of weaknesses in the current public service system, which includes the formal education system. The internal audit of public services is prone to persistent confusion of objectives, roles and responsibilities of the internal audit and inspectorate functions, which reduces utility of the audits. There are also difficulties in designing a structure and mechanisms to actively promote managerial accountability and internal audit, which reflects the fact that the management is not committed to auditing their organisation.

The administration has limited capacity to secure full implementation of public programmes, and there are poor results as a result of a lack of managerial capabilities in the state administration. Finally, the approach to developing the civil servant training system is ineffective, making it difficult to ensure readiness for change in the institutional arrangements.

Turkey's Medium-Term Fiscal Planning Document 2011–2014 sets out a number of aims, which at the time of the SIGMA report had not yet been achieved.

Activities aimed at improving administrative capacity in the period 2012–2014 will be in accordance with the Public Financial Management and Control Law No. 5018 in order to ensure that public administrations efficiently fulfil their tasks and responsibilities in the field of financial management and control and internal audit. Functions that are necessary for the efficient implementation of financial management and internal control and internal auditing in public administrations within the scope of general government will continue. Functions aimed at compliance of public administrations with public internal control and public internal audit standards within the framework of international standards will

also continue. Thus, public internal control and public internal audit standards will form the basis of activities of public administrations. Furthermore, strategic planning and PBB, which have been implemented with a view to strengthening decision-making processes in public administrations and increasing fiscal transparency and accountability, will be used more widely. Strategic plans and performance programmes will form the basis of the process of resource allocation to public administrations.

The LLL Strategy (2014–2018) supports these aims in the non-formal HRD area by highlighting the need for greater coordination in monitoring and evaluation (including improving data and reporting on the performance of the LLL system). In this context, the VQA, as a fairly new institution (established in 2006), has the authoritative role of licensing and accrediting Vocational Knowledge and Skills

Testing and Certification Centres (VOC TEST Centres) and as such performs monitoring and audit functions. Through its established audit procedures, a standardised approach ensures that all centres are audited regularly and that irregularities are reported and corrected. The Turkish Accreditation Agency (TURKAK) is another accrediting organisation that has auditing functions relating to HRD institutions. In the higher education area, a separate audit and quality-monitoring system has been established.

Challenges in the area of monitoring and evaluation

- Ways should be found to develop and implement a standardised approach to monitoring and evaluation throughout the whole HRD system in accordance with international standards, perhaps as part of the TQF dialogue. The World Bank impact assessment approach may provide inspiration for a standardised approach.
- There needs to be greater involvement of end-users in monitoring and evaluation, to ensure that it is not reduced to an academic exercise, but has real value and improves output. Civil society and academia shall take more responsibility by establishing independent sectoral monitoring structures.

3.3 Key findings on capacities in MTEF and programme budgeting (MTEF-specific questionnaire)

3.3.1 Review focus

This section addresses the findings summarised in two of the functions:

- planning and budgeting;
- monitoring and evaluation (in relation to the planning and budgeting).

The main purpose is to review the capacity gaps in the context of programme- or results-based budgeting rather than an input- or activity-based budgeting system. Programme based budgeting (PBB) is more likely than activity-based budgeting to fast-track development objectives within an MTEF in an economy. It hence becomes easier to measure outcomes in both qualitative and quantitative terms.

3.3.2 Main findings

The status of MTEF implementation in Turkey

Turkey has reached the final stage of MTEF implementation. The process started with the introduction of multi-annual budgets in 2006, when a medium-term budgetary framework (MTBF) was adopted. The MTBF was introduced as part of the performance budget process adopted in December 2003, which became fully operational in July 2008 (Catak and Cilingir, 2010).

Main characteristics

The MTBF has two components: a medium-term programme (MTP) and a medium-term fiscal plan (MTFP). The MTP, published by the MoD, represents a multiyear macro fiscal forecast (jointly prepared by the MoF, MoD, and the Under-secretariat of the Treasury). Thus, it represents a roadmap for enhancing the predictability of both public and private sector spending by setting priorities, objectives and policies in various areas in a coherent way. In this respect, the MTP establishes the main directions of development at macroeconomic and sectoral levels, and defines the medium-term (three years) priorities that are consistent with long-term socioeconomic development goals. Through the annual rolled-over budgets, the MTP adds a dynamic component to the overall development framework of the country (Catak and Cilingir, 2010).

The MTFP, elaborated by the MoF and approved by the High Planning Council, contains the multi-annual (current and capital) expenditure ceilings for central budget institutions, which are the basis for drafting the annual Budget Law. The basic objectives and policies defined by the MTP are subsequently transposed into the MTFP, making it possible to implement them under the existing resource constraints that are defined by the pre-determined expenditure ceilings. Hence, the MTFP includes the targeted deficit and borrowing positions, total revenue and expenditure estimates for the three-year period of implementation, as well as the proposed appropriation ceilings of budgetary users.

The MTBF is used by central administration, social security institutions and local authorities, with each one having its own budget. The central administration budget is composed of the general budget, the special budget, and the budget of regulatory and supervisory agency. The budget is outlined for a period of three years; the appropriations for the first year are compulsory, while those for the next two years are only indicative. The budget users have a certain degree of flexibility in spending the assigned resources; they are allowed to reallocate funds from one budget item to another within a 20% limit, and to transfer the unused appropriations in the current year to the next one. Transfers between central government institutions are also allowed, but only on the basis of a specific law issued to this effect. Once the Budget Law is approved, the general budget users elaborate the expenditure programmes, disaggregated at monthly level. Each quarter the MoF approves the programmes and allocates the corresponding resources.

Performance

The MTBF is based on four instruments of budget performance:

- i. Strategic Plans, which include the government's socioeconomic objectives for a five-year period, including the main policies for achieving those objectives, resource allocation for those policies, and performance monitoring indicators for public administrations;
- ii. yearly Performance Programmes based on performance targets and indicators for the planning period, the respective programme activities and their corresponding estimated resources;
- iii. Accountability Reports, which every year present the results for implementation of the planned programmes, projects and activities in terms of resources utilised, deviations from targets, and financial information on performance;
- iv. Analytical Budget Classification¹⁴, which is used to prepare the expenditure side of the budget.

¹⁴ According to this classification, the spending items are divided into four groups: institutional (at four hierarchical levels); functional (in line with the international standards of classification of government functions); financing (by source of financing); and economic (wages, goods and services, transfers, capital expenditures, etc.). The expenditure proposals are elaborated according to the institutional, functional and economic classification, whereas the revenue proposals are in line with the economic classification (Catak and Cilingir, 2010).

The MTBF in Turkey is a participatory process, with most of the actors involved during its preparation, adoption and implementation. As a result, the MTBF is based on common visions regarding the future and a mutually agreed framework of development plans, programmes and activities that are consistent with the strategic goals and objectives of the country. In terms of performance, the participants in the process cooperate in defining the monitoring indicators, which are jointly set by the MoF, MoD and other relevant public administration institutions.

The institutional participatory approach ensures efficient coordination and cooperation among the administrations involved, while increasing the transparency and accountability of the budgetary process and of the overall public finance management function. As a consequence, the MTBF enjoys significant public support, as the mechanism proved to be successful in strengthening fiscal discipline through increased efficiency in the preparation and implementation of the budget. As a result, Turkey's general government gross debt halved in about a decade, reaching 40% of GDP by the end of 2012. On the other hand, the fiscal burden in interest payments declined from an average of 15% of GDP between 2000 and 2002 to 3.5% in 2012, which generated considerable fiscal space. At the same time, the fiscal risks associated with the currency composition of public debt diminished significantly, as the share of general government debt denominated in foreign currency declined from 43% of GDP to less than 11% by the end of 2012 (IMF, 2013a).

3.3.3 Recommendations for further improvement

Turkey is well advanced in the use of a fully-fledged MTEF, as the budgeting process includes most of the elements of a performance-based approach. However, some improvement is needed in a number of areas in order to increase the effectiveness of this tool.

Move from a participatory to a collaborative approach in implementing MTBF strategies

Turkey has elaborated a multitude of strategies and related programmatic documents in various domains of public policy. All of them have been duly prepared, and address the most important issues the government needs to deal with when implementing its policies. However, those strategies are insufficiently articulated, and consequently, some of them have been implemented in parallel and there is insufficient harmonisation with the strategic actions of the Medium-Term Plan (2013–2015). Improved coordination is therefore necessary between line ministries, governmental agencies and other institutional entities in charge of implementing specific policies.

The enhancement of cooperation and coordination is of particular importance in the case of multi sectoral strategies that involve a large number of different institutions, as is the case with the LLL Strategy, which covers all forms of education and therefore involves numerous stakeholders at central and local levels, governmental and non-governmental organisations, public and private institutions, trade unions, employers' associations, etc.

Create an appropriate coordinating mechanism for the LLL Strategy

This is needed for at least two reasons.

Firstly, financing. Compared to other strategies that are owned by a specific institution and therefore financed through the budget of that institution, LLL has multiple sources of financing, as the resources allocated are directed towards several governmental entities. Consequently, the efficient use of allocated funds requires specific mechanisms for financing to be adopted, to ensure both adequate monetary support of implementation agencies and the achievement of the proposed outcomes. Adult learning is of particular importance in this respect, as it combines formal and informal education, vocational training, improvement of skills and competencies, etc.

Secondly, efficient implementation of the strategy and achievement of its objectives. The Turkish LLL Strategy is an ambitious document that aims to raise the participation rate in adult education from

about 3.2% at present to 8% by the end of the implementation period. In order to reach this goal, the government needs to mobilise additional funding, to involve a large number of training providers (in particular the NGO sector), to adopt training schemes that are both effective in delivery and less expensive, to improve the accessibility of adult education schemes to companies and individuals that are less represented in existing training programmes, and to increase awareness among employers and employees about the benefits of adult learning. In this respect, the Turkish government can use several tools that have proved successful in other developed countries.

An important aspect to be considered by the Turkish authorities is the mobilisation of alternative means of financing, from private and individual sources. In OECD countries, adult education and training is funded in various direct and indirect ways across ministries and between public and private sources (UNESCO, 2013) through various innovative and effective funding mechanisms, including cost-sharing partnerships. The employers finance educational activities aimed at acquiring specific skills by their workers, in particular through levy-grant schemes. In France, for example, enterprises allocate a special budget for such training, which in general covers half of the training cost (Bélanger and Bochynek, 2000). Self-financing through participants' fees is used in some countries (for instance, in Denmark and Belgium, where up to 75% and 50% respectively of NGOs' training costs are covered by trainees). Individuals are ready to finance – at least partially – their training if they perceive a net benefit from improving their skills (in terms of higher post-training wages and/or better jobs), or if financial incentives, such as tax deductions for the fees paid for training, are attached to learning.

Improve the accuracy of macroeconomic forecasts

The MTBF is based on a three-year macroeconomic framework offering forecasts for the main indicators, including budget revenues. The forecasts are not always accurate, and in many cases the predictions for economic performance are over-optimistic. Consequently, budgets are based on over-confident scenarios, with forecast revenues going beyond what is feasible for the economy. While forecasting macro-indicators for the second and third year of the period may prove difficult because of uncertainty regarding the future of economic developments, the prognosis for the first year should be sufficiently accurate to construct a realistic annual budget. However, this is not always the case; for example, in 2011 the forecast GDP growth for 2012 was 5% according to the Pre-accession Programme (Government of Turkey, 2011), and 4% according to the MTP for the 2012–2014 period (MoD, 2011). The effective growth of 2012 GDP was only 2.2% in real terms (IMF, 2013b), which is well below expectations. One possible explanation is that Turkey is a very dynamic economy, and the macroeconomic indicators change rapidly in a relatively short period of time (Alantar, 2010) because of the economy's relatively high exposure to internal and external shocks. Nevertheless, the macroeconomic model has to include specific working assumptions for expected shocks and to incorporate their quantified influence. Thus, the main cause of the problem relates to the estimation techniques used, and in particular the hypotheses regarding the expected evolution of economic conditions (too optimistic) and the expected impact of various government policies and measures on the main indicators.

Therefore, the macroeconomic framework should be forecast on the basis of more conservative and prudent scenarios. It is preferable to have an underestimation of macroeconomic performance (GDP growth, budget revenues, etc.) based on more pessimistic assumptions, than an excessively confident prognosis. A better-than-predicted outcome in terms of growth – and therefore revenues – means that there will be more resources available than initially planned, and hence the possibility of financing all the strategic measures envisaged, while recording a fiscal space. In the opposite situation, insufficient revenues lead either to higher-than-intended deficits, or to the inability to fully implement set programmes.

Avoid excessive slippage of expenditures

During budget execution there are frequent slippages of expenditures, mainly as a result of poor compliance with multiyear targets (IMF, 2013a)¹⁵. Between 2006 and 2012, the predicted expenditures drift was significant, leading to higher-than-targeted deficits: the average spending execution was 5.9% higher than the ceiling set in the MTP after the first year of the period, 15.5% after the second, and 22.1% after the third year (IMF, 2013a). In 2011, actual expenditure was 1.1 percentage points of GDP higher than the ceiling set in the 2010 MTBF, and in 2012, 0.8 percentage points of GDP higher than the ceiling set in the 2011 MTBF.

Thus, there are significant expenditure forecasting errors, and this is due to three main factors (IMF, 2013a): the fact that policy decisions are not always aligned to MTP targets; factors relating to the learning process of implementing the MTBF; and uncertainty generated by the 2008 financial crisis. This last factor is the most important, as the deficits have been lower than forecast with the two most recent MTPs.

Without efficient control, actual expenditures can easily exceed the pre-determined ceilings, affecting the credibility of the MTBF planning process and creating a precedent for line ministries to demand more resources than the budget can actually afford. There are cases where, as a result of specific circumstances, a programme of high priority necessitates more resources than initially allocated; in such a situation slippages are allowed, but the complementary spending should be financed from public savings. However, in Turkey the fiscal space generated by lower interest costs was used up in increasing primary expenditures, especially after the 2008 financial crisis. As a result, almost no public savings have been recorded over the whole period since MTBF adoption (IMF, 2013a).

Reduce budget rigidities

There has been much debate in the economic literature over the trade-off between the rigidity and the flexibility of the budgetary process. Budgetary rigidity has the advantage of keeping certain spending categories immune to short-term contingencies by isolating them from annual budgets and therefore allowing the government to fulfil its obligations (IMF, 2013a). This is often the case for social spending (health care, education, pensions). However, an overly rigid budget, as is the case in Turkey, renders the budgeting process unnecessarily complex and ineffective in adjusting to shocks and handling MTP priorities, while possibly including expenditure items that are not of high priority. There is a need for higher budget flexibility, as the government has problems complying with the MTP targets, particularly in enforcing multiyear expenditure control (IMF, 2013a), which hampers fiscal discipline. Rigidities are of a political nature (remuneration and compensations for public employees, various forms of subsidies, including to state-owned companies, etc.) and a mandatory nature (pensions, health care and other forms of social benefits, interest on public debt, maintenance of infrastructure, capital expenditures for ongoing public projects, goods and services relating to education spending following the 2011 education reform).

Compensations to employees and transfers to social security institutions account for most budget rigidities. Between 2005 and 2012, compensations to public employees increased from 23% to 28% of total expenditures as a result of both wage and employment growth. According to the International Monetary Fund (IMF) (2013a), mandatory expenditure as a proportion of total expenditure has grown from 47% to almost 60% since the introduction of the MTBF. Transfers to social security institutions grew from 2% of GDP in 2000 to 5% in 2013, with pensions representing the major part (IMF, 2013a).

Significant rigidities are also generated as a result of weaknesses in controlling the main fiscal aggregates in line with medium-term fiscal targets. Since the expenditure limits are only indicative,

¹⁵ MTP compliance is measured by the difference between forecasts and realisations over the next three years.

and are revised every year to accommodate past deviations, the capacity of the MTP to improve fiscal consolidation remains low. However, the institutional coverage of MTP is relatively low compared with the excessive level of detail in the ceilings, which hampers the control of expenditures. Budget rigidities reduce the government's capacity to adjust the fiscal aggregates according to changing macroeconomic conditions, which impedes the accumulation of public savings, reduces the fiscal consolidation and affects macroeconomic stability. Budget rigidities should therefore be reduced by linking the appropriations and executions to the fiscal targets in current and future years. Those targets must not be exceeded unless exceptional situations arise. Mandatory spending has to be rationalised, and sectoral and programme priorities need to be revised to free up space for public savings and for other priorities (in particular education and public investment), otherwise either a larger deficit will be experienced (which will increase the public debt) or additional tax measures will need to be adopted.

Expenditure targets are met, if the MTP is sufficiently binding, by avoiding the revision of multiyear ceilings on a rolling basis and by introducing an adjustment mechanism for past deviations. Thus, the ceilings need to be locked for a three-year period, not for only one year as is the case at present. If budget revenues are higher than the forecast level, the surplus must be saved instead of covering the expenditure overruns.

Make fiscal targets compulsory for the whole MTBF period

Although it is based on the medium term, the MTP is concentrated in annual budgets, and fiscal targets for the other years are indicative rather than binding. This practice reduces the consistency between the plans set today and those actually implemented in three years' time. There are cases in which large differences occur between what has been actually implemented during the current budgetary year and what was planned three years earlier, and no systematic account of reasons for such differences are provided. Although the law requires accountability statements in case of deviations from initially planned programmes, those statements are used only for internal evaluation purposes. This induces uncertainty within each MTP with respect to de facto programmes that will be actually financed and implemented in the other years, while affecting fiscal discipline. Since government priorities cannot change significantly over the medium term if they are properly set, the multiyear expenditure limits should be binding for the entire MTP period, with deviations allowed only in exceptional cases. If those deviations are caused by expenditure overrun in the previous year, then a mechanism for their monitoring and enforcement needs to be adopted.

By shifting the focus from annual to medium-term budgets and making the fiscal targets compulsory for the whole period of the MTBF, the government has the opportunity to plan and monitor longer policy cycles and therefore to ensure consistency in the policy-making process and sustainability in the implementation of measures. This is particularly important in the field of HRD policies that are designed for the long term, implying constant and long-lasting investment in order to achieve the expected results. Those long-run policies are translated into medium-term plans and financed through annual budgets. Long-term policy cycles are important for counterbalancing the effects of political cycles, when changes in the composition of ruling political coalitions may induce changes in the policy orientations of existing actions and measures. When the fiscal targets – in particular the expenditure ceilings and spending priorities – remain compulsory over the three-year period of the MTBF, any new government, irrespective of its political orientation, is obliged to follow those targets in the medium term at least.

In this context, the MTEF represents the bridge between long-term plans and actual (short-term) resource allocation, and its efficiency is conditional on the existence of a permanent iterative dialogue process between on the one hand the MoF as provider of financing, and on the other the governmental institutions responsible for implementing the HRD policies. The MTEF helps in building the basic budgetary conditions, in particular fiscal stability and expenditure control, if the MoF assumes a strong leadership position and if stakeholders involvement is effective. In such a

configuration, the MTEF plays an integrative role in terms of institutional arrangements, making them more conducive to effective budget management, because a separate budget and planning process at the level of each agency undermines the development of a comprehensive approach to budget making. Clear institutional arrangements are therefore necessary to ensure a 'joined-up' planning and budgeting process. If these arrangements are in place, the MTEF will have a high impact on priority setting and resource allocation through the provision of a realistic, hard budget constraint, and effective political engagement. Thus, the MTEF legitimises policy choices, leading to greater credibility of resource ceilings, budget allocations and predictability of funding.

4. Review process: key conclusions

In accordance with the challenges listed in the previous sections in the four main areas of the RIA component, the following forward-looking key conclusions can be made.

Capacity-building response	Objective	Measures	Results	Actors (main actor + in cooperation with)	Timeline
Interministerial coordination					
Challenge 1: To establish appropriate coordinating structures for HRD that are demand-driven, needs-based (clients) and of direct benefit to users of the system					
Develop and test new approaches to closer user dialogue in HRD governance	Improve quality assurance of HRD governance	1. Pilot feedback concept 2. Evaluation	User feedback systems piloted in HRD governance	MoLSS MoNE	2015
Challenge 2: To establish meaningful and motivating work routines in inter-ministerial and stakeholder coordination forums for the fulfilment of specific performance criteria and matching remuneration					
Design and implement specific performance criteria across the HRD inter-ministerial and stakeholder cooperation forums	Quality assurance of HRD inter-ministerial structures	1. Map existing performance criteria 2. Workshop to develop common performance criteria 3. Design common performance criteria standards for HRD forums	HRD coordination for a well-equipped coordination structure to meet agreed performance standards of work	HRD actors	2015
Design and pilot various forms of remuneration models for coordination forums	Quality assurance of HRD inter-ministerial structures	1. Map existing models (Turkish and international) 2. Support inter-ministerial/stakeholder groups in designing models 3. Pilot and evaluate models in selected committees	Models of remuneration tested	Inter-ministerial and stakeholder working group Selected HRD committees	2015–2016
Challenge 3: Building and extending local forums for HRD					
Increase cooperation and involvement of local stakeholders in HRD	Increase local capacity in HRD	Transfer concepts to local partnership building in selected regions (workshops, peer learning, etc.)	Increased capacity to build and sustain local and regional partnerships/coordination structures in HRD	Local HRD councils Regional HRD councils	2015–2017

Capacity-building response	Objective	Measures	Results	Actors (main actor + in cooperation with)	Timeline
Apply ETF know-how on sectoral approaches to build sustainable local partnerships in HRD	Increase local commitment to HRD	Transfer ETF know-how and adapt to Turkish conditions	Piloted concepts of sustainable partnerships	Local HRD councils Regional HRD councils	2016–2017
Pilot concept in selected regions/cities	Refine cooperation model	Support monitoring and evaluation of piloting	Draw experience (reporting)	Local HRD councils Regional HRD councils	2016–2017
Develop and mainstream a concept for capacity building of local partnerships in HRD	Mainstream and further disseminate local partnerships in HRD	Facilitate regional workshops	Selected regions supported in mainstreaming of partnership building	Local HRD councils Regional HRD councils	2016–2017
Policy design					
Challenge 1: Developing simpler instruments for use by local HRD partnerships The data sources in Turkey mentioned (İŞKUR and TURKSTAT) are not fully appropriate for providing a dynamic response to immediate demands of the labour market, or for dynamic HRD at local level. Instruments of a simpler nature should be developed.					
Build capacity at local level for HRD data-collection methods	Introduce dynamic HRD matching tools at local level	1. Prepare guidelines on local HRD matching data collection 2. Capacity development support 3. Evaluate effect	HRD matching tool for local HRD providers	VET providers İŞKUR centres	2015
Pilot local HRD matching tool	Test and adjust HRD matching tool	Support monitoring and evaluation Final conference for dissemination	HRD matching tool disseminated	VET providers İŞKUR Centres	2016
Challenge 2: Demand-led policy design closely linked to quality assurance Although strategic planning is widespread and of high quality, the link to action planning and monitoring of results is often lacking. This may be overcome by introducing a closer dialogue with the clients and users of the public HRD system. A policy-design approach that is demand-led and closely linked with quality assurance would be a solution for the formalistic, strongly hierarchical and authoritarian strategic planning process.					
Capacity building in establishing/expanding user-feedback systems in HRD governance (regional level)	Improve quality assurance of HRD governance	1. Training Needs Analysis TNA of target groups 2. Capacity building	Number of people trained in user-feedback systems	MoLSS (regional) MoNE (regional)	2016

Capacity-building response	Objective	Measures	Results	Actors (main actor + in cooperation with)	Timeline
Develop and test new approaches to closer user dialogue in HRD governance (regional level)	Improve quality assurance of HRD	Workshops supported at regional level	Number of regional officers have capacity to apply closer user dialogue	MoLSS (regional) MoNE (regional)	2016
Financial planning					
Challenge 1: The main providers of HRD come together to create closer links between strategic planning and financial planning, leading to higher efficiency and better targeting of key priority areas					
Performance management	Introduce performance budgeting linked to strategic planning for HRD provider organisations and HRD-related agencies	Workshops Peer learning Study visits	HRD policy designers build capacity for performance management	MoF MoNE MoLSS	2016–2018
Strategic planning in HRD and performance budgeting	Introduce performance management and strategic planning at HRD provider level	Workshops, capacity building, peer learning, study visits	HRD policy implementers build capacity for performance management	MoNE providers MoLSS providers	2017–2019
Challenge 2: Performance management in HRD linked with financial planning					
Map government agencies and departments that have not introduced PBB	Introduce performance management and strategic planning to HRD policy design level	Workshops Peer learning Study visits	HRD policy design institutions received support to introduce performance management	Ministries involved in HRD policy design	2016–2018
Build capacity and support the building of administrative capacity	Introduce performance management and strategic planning to HRD policy-design level	Workshops, capacity building, peer learning, study visits	HRD policy-design institutions received support to introduce performance management	Ministries involved in HRD policy design	2017–2019
Challenge 3: Mapping of all forms of financing in HRD, and identifying alternative ways of financing HRD activities					
Map financing models across the HRD sector	Survey current practices	Workshops Research study	Survey report	Representatives of HRD sector at all levels	2015

Capacity-building response	Objective	Measures	Results	Actors (main actor + in cooperation with)	Timeline
Prepare recommendations	Compare current practices with international standards	Workshops Research study	Workshop report	Representatives of HRD sector at all levels	2015
Policy implementation					
Challenge 1: Formalising the role and influence of social partners in HRD Although there is a long history of social partner influence on HRD in Turkey, this has never been systematised to the degree that social partners are given any real influence on policy implementation. Without this, the HRD system suffers from a lack of relevance and limited ability to respond dynamically to the needs of the labour market. Structures such as sector committees, regional councils and local boards of education/training have been established, but these struggle with inefficient and demotivated work and meeting practices, owing to the lack of a specific remit or dynamic process for identifying their own spheres of work.					
Capacity building to enhance the role of social partners in HRD implementation	Social partners have defined their clear role in HRD implementation	Workshops Peer learning visits Study visits	Social partners have clear idea of role and functions in future HRD	Selected representatives of social partner organisations involved in HRD	2015–2018
Mainstreaming of concept	Dissemination	Drafting of results of social partner measures	Guidelines for social partners in HRD	Social Partner Reference group ETF expert	2015–2018
Challenge 2: Deepening the ties between delivery institutions and local partners and stakeholders Delivery institutions and local partners and stakeholders may have informal ties and links, but further development of the relationship is hindered by the lack of reliable data and information, and by bureaucratic and formalistic ties to governing bodies. It is difficult to develop an entrepreneurial and innovative dimension to HRD in this climate.					
Capacity development for learning – cluster building in larger cities	Increase the capacity of VET institutions in large cities	Workshops for building capacity of local learning institutions to form strategic clusters of learning	Report	Representative of VET institutions in larger cities	2016
Mapping of institutional framework	Prepare VET institutions for increase in enrolments	Analyse the potentials and resources of VET institutions in larger cities Peer visits	Report Peer visit findings	Representative of VET institutions in larger cities	2016
Capacity building for increasing access to HRD through innovative and	Prepare HRD provider institutions for wider access for learners	Workshops Concept development Peer learning	Number of representatives of HRD providers that	Representatives of HRD providers	2017

Capacity-building response	Objective	Measures	Results	Actors (main actor + in cooperation with)	Timeline
entrepreneurial piloting of new concepts			have built capacity in wider learner access		
Mainstreaming of concepts (seminars, peer learning, etc.)	Prepare HRD provider institutions for wider access	Workshops Concept development Peer learning	Number of representatives of HRD providers that have built capacity in wider learner access	Representatives of HRD providers	2018
Monitoring and evaluation					
Challenge 1: A standardised approach to monitoring and evaluation based on international standards for the whole HRD system (possibly as part of the TQF dialogue)					
Apply the FRAME RIA approach to build monitoring and evaluation capacity at local and regional level	Mapping of governance capacity-building needs at regional and local level	Transfer of concepts to local partnership capacity building in selected regions, through workshops, peer learning and training	RIA exercises carried out at regional level in selected regions	Local experts HRD institution representatives	2015
Challenge 2: Involvement of the end-users in monitoring and evaluation, to ensure real value and improve output					
Monitoring and evaluation concept introduced in selected institutions at all levels of HRD policy design, implementation and evaluation	Quality assurance development in HRD sector	Workshops Peer learning Drafting of guidelines	Adapted model of monitoring and evaluation	MoLSS MoNE HRD partners	2018
Monitoring and evaluation concept evaluated	Quality assurance development in HRD sector	Survey of participating institutions Seminar Drafting of paper	Adapted model evaluated	MoLSS MoNE HRD partners	2020

5. Conclusion

The major strengths of Turkey's HRD system are its capacity, the number of learners it serves, and its increasing quality assurance of its processes and outputs. The Turkish Qualifications Framework is one of the instruments that is driving closer coordination between institutions that traditionally operate independently. Forecasts indicate that the country has a growing and ageing population, which places more emphasis on the need for a coordinated approach to LLL. The increase in the number of jobs in professional, technical and vocational occupations will require an extension of the current capacity of VET institutions to provide appropriate matching of supply and demand. This challenge has been the main focus of the MoNE and the MoLSS during recent years, and many projects and initiatives have been undertaken to prepare policy planning and policy delivery to meet future needs.

The social partners have, and will continue to have, an increasingly central role in the design and delivery of HRD in the country. As a new competency-based approach is being introduced, this role is currently being redefined, and stakeholders are increasingly being required to take an active part in the planning processes at all levels of HRD. Here, more focus should be placed on coordination structures and on how these can be made more efficient, giving stakeholders meaningful influence on decision-making processes. This area still needs to be developed further.

Many of the recent development projects and initiatives have focused on policy design at national level, while the regional and local reform processes have been somewhat more difficult to implement, perhaps owing to the size of the country and the complexity of the system. Here, new projects and initiatives could play a role in revitalising existing cooperation structures, and in focusing on the matching of skills to current local and regional demands, building the capacities of regional and local actors and stakeholders.

The complexity of the HRD system in Turkey presents a challenge for the implementation of new initiatives and approaches, as it necessitates capacity building and a new mind-set on the part of key players at all levels. Raising the quality standards of provision requires performance management, a close and efficient utilisation of resources and a matching of actual performance to agreed criteria. The consequences of bad or good performance on budgeting and allocation of financial resources have still not been fully addressed, and capacity building is needed to introduce this widely across the HRD sector.

In conclusion, the institutional arrangements in the Turkish HRD sector are in the process of undergoing a paradigm shift, which requires a new mind-set on the part of those in charge of policy design and delivery. This process has been under way for some time and support is needed in particular areas to ensure that it continues, and reaches completion.

PART III – MONITORING THE PROGRESS OF SKILLS VISION 2020

The monitoring component of the FRAME initiative focused on assisting pre-accession countries in their efforts to comprehensively monitor progress on HRD policies. Building on the foresight and RIA results, a monitoring tool was developed (a set of indicators and methodological guidelines). The ETF, with national authorities and stakeholders, defined and agreed on the monitoring tool based on a participatory approach (regional consultations and country bilateral work).

National technical teams¹⁶ were set up and guided the common work on identifying a list of feasible¹⁷ indicators to be used for monitoring progress in skills generation at national level and in referencing countries' progress against regional (SEE 2020) and EUROPE 2020 goals. The National Technical Team in Turkey brought together representatives from the MoLSS, the MoNE and İŞKUR.

Turkish representatives have contributed greatly to the development of the monitoring tool, providing expertise, examples and updates on monitoring and evaluation arrangements, interinstitutional coordination and the country's ongoing efforts to completely align the HRD statistical system to EU (Eurostat) standards. The system is very sound in all aspects: data generation, data collection, processing and publication.

There has been a particular focus, including in terms of the ETF expertise provided, on:

- drafting IPA II – Human Resources Development Operational Programme 2014–2020 (HRD OP 2014–2020);
- enhancing the linkage between national follow-up processes and relevant European strategic frameworks (e.g. EUROPE 2020, Strategic cooperation on Education and Training – ET 2020, etc.).

Consultation on the most relevant and feasible indicators for measuring progress in HRD OP implementation and its expected impact were held in several rounds. In the second regional monitoring meeting (Turin, 25 June 2014) MoLSS delivered a spotlight presentation on the selection of relevant indicators and monitoring arrangements for HRD OP in Turkey within the wider national strategic framework on skills development. HRD OP 2014–2020 is built on national key strategic orientations and targets and the main pre-accession preparations. The actions set out under each priority area support Turkey's progress towards the European social model and its alignment to EU acquis on education, employment and social policy. The national targets (established in Vision 2023 and the National Development Plan for 2018) guided the work on setting actions, measures and indicators. The most pressing issues for Turkey's authorities and other stakeholders are:

- to provide more and better evidence-based support to vulnerable groups (subsumed under the broad objectives of increasing participation in the labour market and in education, and fighting social exclusion);
- to efficiently link financial allocations to performance;
- to further support all actors (across the multitude of layers – national, regional, local) in evidence (data) generation and in the use and follow-up of national targets, in a wider international and EU perspective.

¹⁶ These bring together experts from relevant HRD actors (e.g. ministries of labour, education, economy, development, research and youth, and implementing agencies, statistical offices, and other stakeholders).

¹⁷ This is a so-called 'common denominator' set of indicators in line with international and European statistical standards available in all or most of the enlargement (SEET) countries.

The issue of an integrated approach to institutional and procedural monitoring and evaluation arrangements has also been raised and discussed in FRAME-led or country work. Strengthening ownership of the different HRD priorities among stakeholders and ensuring a mutually reinforcing of national and European long-term planning, monitoring and evaluation of policy progress were discussed at the seminar held at the ETF premises in May 2014.

Optimising synergies between joint EU–Turkey planning, monitoring and evaluation processes¹⁸ and the nationally led follow-up processes on key HRD areas (e.g. strategies on LLL, VET, employment) has been recognised as a key priority. This would improve working procedures (e.g. efficient gathering of information and data; comprehensive reports) and, more importantly, would produce complete, up-to-date and relevant information on Turkey's progress in key HRD areas. Given the size of its systems and coverage, the diversity of the challenges (especially from a cross-regional perspective) and the advances to date on education, training and employment policy areas, Turkey could provide valuable learning examples for the SEET region on policy implementation and the removal of bottlenecks.

During the two regional technical meetings on monitoring held under the FRAME initiative (see Annex 2 for detailed agenda), the Turkish representatives provided feedback on the FRAME common indicators¹⁹. In addition they proposed the operationalization of a real-time evidence platform (web-based monitoring tool to show SEET countries the current status and progress on key HRD indicators) as further work in the area at regional level.

Building on the foresight and RIA components and on the key national priorities on HRD, Table 5 shows the list of common indicators and references to the national priorities as identified in Turkey's Skills Vision 2020 and roadmap. In addition, Annex 4 contains a series of monitoring graphs illustrating the progress to date on key HRD indicators (2010–2013), trends and benchmarking against the EU and SEET averages and targets (2020). The monitoring table and graphs refer to FRAME common indicators.

The indicators are clustered around three key policy areas reflecting the methodological approach used in the Joint Assessment Framework (an evidence-based monitoring and assessment tool for the EUROPE 2020 Strategy). The selected policy areas refer to:

- improving education and training systems (raising skills levels, acquisition of key competencies, preventing early school leaving, etc.);
- enhancing skills supply, productivity and LLL (adaptation of skills to labour demand; training measures, etc.);
- increasing labour market participation (employment, unemployment, labour market participation of specific groups, investments and participation in ALMPs, etc.).

In the following years, the ETF will continue its dialogue on and support for enhanced evidence-based policy making in HRD in the enlargement countries.

¹⁸ These include IPA II – HRD OP 2014–2020; Employment and Social Reform Programme; and the Bruges and Torino Processes.

¹⁹ With regard to the common indicators proposed in the FRAME monitoring tool, Turkey performs well in terms of data availability and conformity with EU standards.

Table 6: List of indicators for skills generation monitoring (common indicators) – Turkey

National priorities (Skills Vision 2020)	Indicator	Unit	Definition	Source	Data release	LAY
Policy area 1: Improving the education and training system						
Priority 1: Quality and accessible education (Activity 1.1. Improving scope and quality of education services, VET and LLL systems; Activity 1.2 Supporting actions to increase attendance and access to education at all levels, including early childhood education) Priority 3: Improving social policies for an inclusive society (Activity 3.2 Improving access for all to employment, education, health, social services and social assistance)	K. Tertiary educational attainment	%	Proportion of population aged 30–34 having successfully completed university or university-like education (ISCED 5 or 6)	Eurostat/ LFS	Yearly	2013
	K. Highly qualified people	000	Population aged 15+ who have attained university-level degree (ISCED 6) (for Turkey: universities and other higher educational institutions)	TURKSTAT/ LFS	Yearly	2013
	K. Early leavers from education and training	%	Proportion of the population aged 18–24 with at most lower secondary education and who are not in further education or training	Eurostat/ LFS	Yearly	2013
	K. Low achievers in basic skills	%	Proportion of 15-year-olds failing to reach Level 2 in reading, mathematics and science as measured by OECD's PISA	OECD	Every 3 years	2012
	Financing education	%	Public expenditure on education as a percentage of GDP	Education statistics	Yearly	2013
	Participation in VET	%	Number of students in VET as a percentage of total enrolment in upper secondary education (ISCED 3) (for Turkey: vocational and technical secondary education as a share of secondary education)	Education statistics	Yearly	2012

Policy area 2: Improving skills supply and productivity, lifelong learning

Priority 1: Quality accessible education (especially Activity 1.3 Promoting LLL through the implementation of developed strategies, TQF and Turkey's participation in EU youth programmes)	K. Participation in LLL	%	Proportion of the population aged 25–64 who stated that they had received formal or non-formal education or training in the 4 weeks preceding the survey	Eurostat/ LFS	Yearly	2013
	K. Employment rate of recent graduates	%	Proportion of employed people aged 20–34 having successfully completed upper secondary or tertiary education, 1–3 years before the reference year of the survey and who are no longer in education or training	Eurostat/ LFS	Yearly	2013
	Training needs analysis	#	OECD – Small Business Act Assessment methodology	OECD	Every 3 years	2012
	University–enterprise cooperation	#		OECD	Every 3 years	2012
	Training for women's entrepreneurship	#		OECD	Every 3 years	2012
	Access to training	#		OECD	Every 3 years	2012
	Innovative skills	%	Proportion of people employed in knowledge-intensive activities, as a percentage of total employment	Eurostat/ LFS	Yearly	2012
	Adult literacy	%	Proportion of adult (10+) population able to read and write a simple text in the national language	UNESCO	Every 10 years	2011
	Placement rate of VET learners	%	Proportion of employed people who attended a VET programme (junior high school or equivalent vocational school + vocational school at high school level) as a percentage of total employment	TURKSTAT/ LFS	Yearly	2013

Policy area 3: Increasing labour market participation

Priority 2: Increasing employment (all activities) Priority 3: Improving social policies for an inclusive society (Activity 3.2 Improving access for all to employment, education, health, social services and social assistance)	K. Employment rate (20–64)	%	Ratio between the employed population aged 20–64 and the total population aged 20–64	Eurostat/ LFS	Yearly	2013
	K. Overall employment rate, percentage of the 15+ population	%	Ratio between the employed population aged 15+ and the total population aged 15+	TURKSTAT/ LFS	Yearly	2012

LAY – last available year; K – key indicator

ANNEXES

Annex 1a: Participants in workshops and events throughout the drafting process of the Skills Vision 2020 report

Organisation	Name of participant
Adana Municipality	Sait ALTIPARMAK
Ankara Provincial Directorate for National Education	Erdal AŞCI
Ankara University Lifelong Learning Centre (Sem)	Elçin ÇİĞNER CENGİZ
Antalya Association of Tourism Hotelier and Business Association (AKTOB)	Abdullah Durmuş
Antalya Chamber of Commerce and Industry	Tolga Cenk TÜRK
Antalya Public Education Centre	Şakir ŞEN
Antalya Serik Vocational Education Centre	Ferayim GENÇ
Antalya Vocational Education Centre	M. Hanifi İNCE
Antalya-Kepez Teomanpaşa Public Education Centre	Mehmet KOCABABA
Association of the Continuous Education Centres of Turkish Universities, Boğaziçi University	Tamer ATABARUT
Association of Vocational Education	Mustafa GÜNEŞ
Atatürk University Lifelong Learning Centre (Sem)	Abdulkadir ÇİLTAS
Bahçeşehir University	Azize GOKMEN
Batman Provincial Directorate for National Education	Osman Veysel ÖZDAŞ
Beneficial Human Union NGO	Mehmet AKMAN
Bilgi University Lifelong Learning Centre	Selim SONSİNO
Boğaziçi University	Tamer ATABARUT
Bursa Municipality	Kemal AK
Bursa Provincial Directorate for National Education	Kemal ÜNAL
Chairman of the Vocational Education Committee of Ito/Utesav	Mehmet DEVELİOĞLU
COMAU S.p.A.	Luca CIVITICO Massimo IPPOLITO
Elginkan Foundation	Necati ABALI
Entrepreneur Development Foundation (Mesvak)	Nurettin KONAKLI
Erzurum Provincial Directorate for National Education	Yüksel AKTAŞ
Eskişehir Municipality	Didem AYDINMAKİNA
Eskişehir Provincial Directorate for National Education	İbrahim ŞEKER
European Commission – DG Employment, Social Affairs and Inclusion	Christiane WESTPHAL

ETF international experts	Patrick CREHAN Constantin ZAMAN
EU Delegation to Turkey	Virve VIMPARI Mustafa BALCI Zeynep AYDEMİR KOYUNCU
EU Education Association	Sibel Kaygusuz BEYLEN
Foundation for the Promotion of Vocational Training and Small Industry	Nisan ZORLU Elif Alper DELİCE
Gazi University	Atila KOCA Bülent TARMAN Mustafa AKSOY
Gaziantep Provincial Directorate for National Education	Mehmet Ali TIRYAKIOĞLU
Hacettepe University Lifelong Learning Centre (Sem)	Uğur ÖMÜRGÖNÜLŞEN
HAK-İŞ	Şahin SERİM
Council of Higher Education (YÖK)	Özgül ÜNLÜ
İpek University	Meltem Huri BATURAY
İstanbul City University	Ali Osman UYMAZ
İstanbul Commerce University	Oğuz BORAT Cihad DEMIRLI
İstanbul Kultur University	Sermin ÖRNEKTEKİN
İstanbul Municipality	Mehmet DOĞAN
İstanbul Municipality Vocational Education Department	Güven ÇALIŞKAN
İstanbul Provincial Directorate for National Education	Zekine DAYIOĞLU
Kocaeli Provincial Directorate for National Education	Ali Osman KARABAYIR
Konya Municipality	Selim Yücel GÜLEÇ Abdullah KALELİ
Konya Provincial Directorate for National Education	Halil İbrahim KARADEMİR
Member of the Vocational Education Committee of Ito/Utesav	İsrafil KURALAY
Ministry of Culture and Tourism	İbrahim BEGENDİ
Ministry of Development	Feray ELDENİZ
Ministry of Environment and Physical Planning	Mehmet Latif ÇİÇEK
Ministry of Family and Social Policies	Davut İMAMOĞLU Ergin BALCI
Ministry of Finance	Ali Asker DEMİRHAN
Ministry of Health	Fuat Emre CANPOLAT
Ministry of Labour and Social Security	Cüneyt ÖZEN Mehmet Yavuz GÜNGÖR Cengiz AYDEMİR Kamran KURU Murat AKSOY Gözde Elif DEMİREL

	Tuba DURDU Gülrihan CİHANOĞLU Nagehan KÖSEOĞLU Melih AKIN Uğurcan TAŞKINER
Ministry of National Education	Salih ÇELİK Mehmet Baki ÖZTÜRK Fatih İŞLEK Niyazi KIZILBULUT
	İbrahim BÜKEL
	Fehmi YERLİKAYA Kübra KARABİŞ Süleyman YİĞİTTİR Zeynep ÖÇGÜDER Müesser İlknur ACUN M. Kemal BİÇERLİ İsmail DEMİR İbrahim Nail BURAL Kazım AYHAN Dilek AYDOSLU Özlem KAYA Mehmet Zeki OKTAY Ahmet ARİFOĞLU Venhar ŞAHİN Süleyman AKGÜL Murat TANRIKOLOĞLU Ender ERESKİCİ Murat MİDAS Ferhat SERT Şennur ÇETİN
MoNE Directorate General of Lifelong Learning	Mikail ATASEVER Recep KAYA
MoNE Directorate General of Private Education Institutions	Mehmet KÜÇÜK Ali KARAGÖZ Hakan ŞEN
MoNE Directorate General of Secondary Education	Ali KARATAY
MoNE Directorate General of Special Education Guidance and Counselling Services	Ayşe Hale BACAĞOĞLU Derya Merve USLU
Ministry of Science, Industry and Technology	Yaşar ŞİRİN
Ministry of Transport, Maritime Affairs and Communications	Orhan Kemal ARDIÇ
Pamukkale University	Ramazan BAŞTÜRK
Regione Piemonte	Franco CHIARAMONTE Pietro VIOTTI
Selçuk University	Recai KUŞ
Seta Research Foundation (Seta)	Zafer ÇELİK
Small and Medium Enterprises Development Organisation (KOSGEB/SMEDO)	Hatice KESKİN

Technical Training Foundation (Tekev)	Özkan AVCI
Technical Training Foundation (Tekev)	Uğur ÖZKAN
The Scientific and Technological Research Council of Turkey (TÜBİTAK)	Selçuk ÖZDEMİR
The Union of Chambers and Commodity Exchanges of Turkey (TOBB)	Eyyüp KILCI
Turkish Confederation of Employer Associations (TISK)	Sibel TUĞ
Turkish Cooperation and Coordination Agency (TIKA)	Hacı İbrahim ERBİR
Turkish Education Union	Vedat Ali İNAM
Turkish Employers' Association of Metal Industries (MESS)	Aykut ENGİN
Turkish Industry and Business Association (TÜSIAD)	Deniz (Gürel) KARATAŞ
Turkish Labour Agency (İŞKUR)	Emrullah ASLAN Abdullah Tamer YILMAZ Mehmet Ali ÖZKAN Mesut AKKAYA Emine ARSAL Aysun AYYILDIZ Nazim BALCI Meltem BALI Merve BAYDAR Sadik BOL Özhan ÇALIŞKAN Lokman CEYLAN Hatice COŞAR Mutlu DEMİREL Gönül DEMİRSU Yasemin DURUSOY Süleyman Deniz GÜNSAN Yusuf MERİÇ Nurgül NAZLI TANSU Yakup PARLAKAY Salih Mert PEKÇABUK Selvi POLAT Sezgin SARAÇOĞLU Uğur TUNÇ Emre YILDIZ Berat Mustafa ÖZEN
Turkish Neonatology Association	Uğur DILMEN
Turkish Radio and Television Association (TRT)	Ali Fuat AYKIN
United A.S	Engin EMRE
Vocational Qualifications Authority (MYK)	Yaprak AKÇAY ZİLELİ Osman Seçkin AKBIYIK
Education expert	Kadir TUZLAK

Annex 1b: Participants in the FRAME validation and dissemination event – Ankara, 23 September 2014

Organisation	Name of Participant
Akdağmadeni Association of Disabled People	Sayit ÜNLÜ
Ankara Development Agency	Şeref Furkan CEYLAN
Ankara Metropolitan Municipality	Burcu GÜNAY
Ankara University	Elçin ÇİĞNER CENGİZ Hasan Fehmi ÖZDEMİR
Atatürk University	Ersin KARAMAN
British Council	Yavuz YILMAZOĞLU
Dicle Development Agency	Tabip GÜLBAY
DISK – Confederation of Progressive Trade Unions of Turkey	Tevfik GÜNEŞ
Economic Policy Research Foundation of Turkey (TEPAV)	Güneş AŞIK ALTINTAŞ
Education Reform Initiative (ERG)	Zakir Batuhan AYDAGÜL
Entrepreneur Development Foundation (Mesvak)	Nurettin KONAKLI Elif KONAKLI ÖZGÜÇ
EU Delegation to Turkey	Zeynep AYDEMİR Mustafa Balci Numan ÖZCAN Virve VIMPARI
Gazi University	Işıl KURNAZ Bülent TARMAN
Geoff Fieldsend and Associates	Geoffrey FIELDSEND
GFA Consulting	Fusun AKKÖK
HAK-İŞ	Şahin SERİM
International Association Of Disabled People, Presidency of Istanbul Province	Hülya ÇIZIKMAN
International experts	Jennifer HARPER Donald PATERSON
International Labour Organization	Fatma GELİR
Istanbul Metropolitan Municipality	Ali YÜCEL
Izmir Roma Association	Gökmen DUNAR Vedat KARAKAYA
IZODER	Güneş YÜZÜGÜR
MESS Training Foundation	Necdet KENAR
Middle East Technical University (METU)	Tuğçe ALDEMİR Sibel KALAYCIOĞLU Nergis Ayşe GÜREL KÖYBAŞI

Ministry of EU Affairs	Petek KARATEKELİOĞLU Demet ÖZKAN BALTAT
Ministry of Development	Merve ALTUNDERE Aslı DOLU Feray ELDENİZ Gökhan GÜDER Hande HACİMAHMUTOĞLUR Yalın KILIÇ Müşerref KÜÇÜKBAYRAK Erol OHTAMIŞ Dilek OKKALI ŞANALMIŞ
Ministry of Family and Social Policies	Handan ARSLANTAŞ Erdem BODUR Tevfik ÇAMPINARI Selin CENGİZ Hülya DURAN Mehmet ERDOĞAN Zeynep HAN AKIN Erem İLTER Ozan İLTER Pınar İRDEM Ercüment IŞIK Fahri KOCAOĞLU Fatma KÜÇÜKBAŞOL Şahin METİN Özlem YÜKSELBABA
Ministry of Health	Perihan Elif EKMEKÇİ
Ministry of Labour and Social Security	Onur AÇIKGÖZ Melih AKIN Murat AKSOY Cengiz AŞKIN Ömer AYÇİÇEK Cengiz AYDEMİR Erhan BATUR Taner ÇAKIR Gülrihan CİHANOĞLU Tuba DURDU Aydın ERDOĞAN Çağrı ERGANİ Hande GÖNÜL Melahat GÜRAY Can KARACAN Ender KARAKÜLAH Fatma KAYA Nadya KONSTANTINOVA Nagehan KÖSEOĞLU Cüneyt ÖZEN Gökşin ŞAHİN Ali Ercan SU Uğurtan TAŞKINER Hülya TEKİN Mikail TUNÇEL

	İrem YAZAR Alper ZEYTUN
Ministry of National Education	Hatice Kübra AKÇAM Recep ALTIN Fatih BAŞAK Salih ÇELİK Şennur ÇETİN İsmail DEMİR Osman DEMİRGÜL Ali KARATAY Zeynep KAYA Pınar SELÇUK SÜZME Ferhat SERT Osman YALÇIN
Ondokuz Mayıs University	Kezban ÇELİK
People Management Association (PERYÖN)	Özden ASLAN
SPOD	Nihan ERDOĞAN
TESK	Zeynep GAZİOĞLU
The Presidency of Confederation of Anatolian Disabled People	Nedim KILIÇ
The Scientific and Technological Research Council of Turkey (TÜBİTAK)	Ayşegül GÜNEL ARAS
The Union of Chambers and Commodity Exchanges of Turkey (TOBB)	Eyyüp KILCI
TOBB University of Economics and Technology	Serdar SAYAN
Turkish Accreditation Agency (TURKAK)	Doğan YILDIZ
Turkish Confederation of Employer Associations (TISK)	Sibel TUĞ
Turkish Employers' Association of Metal Industries (MESS)	Fatih TOKATLI
Turkish Employment Agency (İŞKUR)	Oğuz DÜZGÜN Asım Göker KESKİN Mehmet Ali ÖZKAN
Turkish Enterprise and Business Confederation (TURKONFED)	Arda BATU
Turkish Industry and Business Association (TÜSIAD)	Ebru DİCLE Sinem ULUTURK CİNBİŞ
Turkish Statistical Institute (TÜİK)	Pınar TAŞKAN
UNICEF	Özge HASSA
UTESAV	Mehmet DEVELİOĞLU İsrafil KURALAY
Vehbi Koç Foundation	Seçil KINAY
Vocational Qualifications Authority (MYK)	Osman Seçkin AKBIYIK İsmail ÖZDOĞAN Yaprak AKÇAY ZİLELİ

Yaşar University	Sabah BALTA
Zero Discrimination Association	Hatice ÇETİNKAYA Zeynep Duygu ULUSOY

Annex 2: Agenda of events

Workshop on Promoting Lifelong Learning in Turkey: Putting the LLL Strategy in Practice 2014–2018, held in Antalya (Turkey) on 12–13 March 2014

Day 1	
Time	Session objective
09:00 – 09:30	Registration and coffee
09:30 – 10:15	Opening M. Kemal BİÇERLİ, General Director LLL DG, MoNE Lida KITA, ETF Virve VIMPARI, EU Salih ÇELİK, MoNE Deputy Undersecretary
10:15 – 11:15	Plenary: LLL – key contribution for building up skills for the future in Turkey LLL strategies and adult learning agenda of the EU (mechanisms for quality assuring and recognising LLL) Arjen DEIJ, ETF Long-term vision and planning in HRD field – Turkey’s position in a global context Patrick CREHAN, ETF Questions and Answers
11:15 – 11:30	Short coffee break
11:30 – 13:00	Panel: LLL Strategies and Action Plan for 2014–2018 in Turkey LLL implementation and challenges in Turkey Prof. Dr. Oğuz BORAT LLL Strategy Paper and the priority areas İsmail DEMİR, LLL DG Possibilities for EU assistance to the implementation of the LLL strategic actions Mustafa BALCI, EUD Ankara Questions and Answers
13:00 – 14:30	Lunch and coffee
14:30 – 17:30	Session 2 Parallel working groups: Coordination of LLL Responsibilities and roles of LLL providers and financing of LLL RPL. A building block for a functional LLL system
17:30 – 18:00	Wrap up and next steps for Day 2

Day 2	
Time	Session Objective
09:30 – 10:00	Welcome to Day 2 Recap from Day 1 : Feedback from group rapporteurs
10:00 – 11:15	Session 3 – Lifelong Guidance and Counselling Plenary: How to increase LLL participation through counselling and guidance and awareness raising The role of lifelong guidance in supporting LLL goals – European and international perspectives Helmut ZELLOTH, ETF Measures to increase lifelong guidance and counselling provision Mehmet Ali ÖZKAN, İŞKUR Questions and Answers
11:15 – 11:30	Coffee break
11:30 – 13:00	Session 4 – LLL monitoring and evaluation system Monitoring tool and its relevance for linking up national progress towards European benchmarks Cristina MEREUTA, ETF expert Monitoring and evaluation arrangements for LLL in Turkey, focused on PIACC preparations in Turkey Cengiz AYDEMİR, MoLSS İbrahim Nail BURAL, MoNE Questions and Answers
13:00 – 14:30	Lunch and coffee
14:30 – 15:30	Session 5 – Debate on future steps and concluding remarks What are the needs for capacity building at provincial level with a view to developing, implementing and monitoring efficient action plans for LLL? Salih ÇELİK, MoNE Deputy Undersecretary

Seminar on Enhancing integrated approaches in human resources development and employment policies in Turkey, held in Turin (Italy) on 5–6 May 2014

Day 1	
Time	Session objective
09:00 – 09:30	Registration and coffee
09:30 – 10:00	Opening remarks Chair: Henrik Faudel, ETF Madlen Serban, ETF Christiane Westphal, European Commission (DG Employment, Social Affairs and Inclusion) Nagehan Köseoğlu, MoLSS
10:00 – 10:10	Scene setting: Turkish–ETF cooperation and event context, objectives and flow Lida Kita, ETF
10:10 – 11:10	Plenary: Building up skills and fostering employment in Turkey Turkey's policy approach towards a skilled and inclusive society Tuba Durdu, MoLSS Social partners' perspective on Skills for the Future Eyyüp Kilci, the Union of Chambers and Commodity Exchanges of Turkey (TOBB) Education Committee Questions and Answers
11:10 – 11:30	Coffee break
11:30 – 13:00 (parallel sessions)	Working group 1 (Sala Europa) Lifelong guidance in Turkey Chair: Helmut Zelloth, ETF Emre Yildiz, İŞKUR Helmut Zelloth – Ummuhan Bardak, ETF Questions and Answers Working group 2 (Training Room) IPA II and the HRD OP 2014–2020: reinforcing the potential of national and European long-term planning, monitoring and evaluation of policy progresses (e.g. Bruges and Torino Process Report etc.) Chair: Lida Kita, ETF Gözde Elif Demirel, MoLSS Christiane Westphal, European Commission (DG Employment, Social Affairs and Inclusion) Mustafa Balci – Zeynep Aydemir, EU Delegation to Turkey Georgios Zisimos, ETF Questions and Answers
13:00 – 14:00	Lunch and coffee
14:00 – 14:30	Transfer from ETF to field visit locations
14:30 – 17:30	Field visits: practical insights on successful innovation, research, apprenticeship and employment initiatives in Piedmont region, Italy Group 1: COMAU S.p.A. Forty years of experience in advanced manufacturing systems, automotive industry, and integrated robotics and centres of excellence, a truly global presence, with 24 locations in 13 countries. Address: COMAU S.p.A - Via Rivalta 30, Grugliasco (TO)

Presentation on HRD policy design and implementation at regional level. Integrated initiatives funded by regional, national and European Social Fund.

Pietro Viotti, Regione Piemonte

COMAU: a centre of excellence for skills development through research, innovation and apprenticeship: partnership among industry, regional authorities and university for skills for the future

Massimo Ippolito - Luca Civitico, COMAU S.p.A.

Group 2: Agenzia Piemonte Lavoro (APL)

APL is the public employment institution of the Piedmont Region. It provides services to achieve the integration of employment policies, training and career guidance, education and social policies with the policies of economic and social development.

Address: Via Belfiore 23/c - Torino

Introduction to the initiative 'IoLavoro – A European Youth Guarantee', Piedmont Region

New tools and methodologies for skills matching

Evidence, analysis and monitoring of the labour market

Integrated approaches: regional, national and EU funding (ESF)

Franco Chiaramonte, Agenzia Piemonte Lavoro

Day 2	
Time	Session objective
09:30 – 09:45	Welcome to Day 2 Recap from Day 1 and objectives of Day 2 Lida Kita, ETF
09:45 – 11:15	Chair: Cristina Mereuta, ETF Shaping the policy planning, design and delivery of ALMPs in Turkey – Results of ALMP evaluation in Turkey Recent evidence on ALMPs' impact and main lessons for improved design, delivery and evaluation Prof. Jochen Kluge, Humboldt University Berlin, Germany Measures to increase quality and coverage of ALMPs provision in Turkey Uğur Tunç, Turkish Employment Agency (İŞKUR) Questions and Answers
11:15 – 11:30	Coffee break
11:30 – 13:00	Chair: Arjen Deij, ETF LLL strategies and adult learning agenda: policies and measures. Turkey's recent developments in policy responses and good practices at local level in mitigating the education, employment and social challenges of different groups. Turkey's recent developments in policy responses in education and training – evidence on strategic and integrated approach Murat Midas, MoNE LLL implementation in Turkey with a special focus on Continuing Education Centres of the universities Tamer Atabarut, Association of the Continuing Education Centres of Turkish Universities, Boğaziçi University Transition from school to work: career guidance, changing careers, building new skills Azize Gokmen, Technical and Vocational Research and Development Centre (METGEM) of Bahçeşehir University ETF stocktaking on NEETs in ETF partner countries, including Turkey Ummuhan Bardak, ETF Questions and Answers
13:00 – 14:00	Lunch
14:00 – 15:00	Plenary discussion on further Turkey–EC–ETF cooperation on HRD Concluding remarks MoLSS European Commission (DG Employment, Social Affairs and Inclusion) EU Delegation to Turkey ETF

FRAME Final conference on Long-term vision, planning and delivery of skills for the future, held in Ankara (Turkey) on 23 September 2014

Time	Session objective
08:30 – 09:15	Registration of participants
09:15 – 09:45	Opening EU Delegation to Turkey Erhan BATUR, Deputy Undersecretary, MoLSS, Head of HRD OP, EU Permanent Contact Point
09:45 – 11:00	Chair: Lida Kita, Specialist in VET and Social Inclusion – Country Manager for Turkey, ETF <ul style="list-style-type: none"> ➤ Skills 2020 Turkey Report, European Training Foundation Jennifer HARPER, Foresight international expert Lida KITA, Specialist in VET and Social Inclusion – Country Manager for Turkey, ETF ➤ Science and Technology Human Resources Strategy and Action Plan 2011–2016 Ayşegül GÜNEL ARAS, Department of Science, Technology and Innovation Policy, Scientific and Technological Research Council of Turkey (TÜBİTAK) ➤ Overview of Skills foresight in UK Geoff FIELDSEND, former Director of Policy and Research, UKCES – UK Commission for Employment and Skills <p style="text-align: center;">Questions and answers, and discussion</p>
11:00 – 11:30	Coffee / tea break
11:30 – 12:30	<ul style="list-style-type: none"> ➤ The National Employment Strategy 2014–2023 Ali Ercan SU, EU Expert, EU Coordination Department, MoLSS ➤ Lifelong Strategy and Vocational Education Strategy 2014–2020 İsmail DEMİR, Head of Educational Policies and Programmes Department, DG for LLL, MoNE Şennur ÇETİN, Head of Social Partners and Projects Department, DG for VET, MoNE ➤ Skills Vision 2020 Ebru DICLE, Deputy Secretary General, Turkish Industry and Business Association (TÜSİAD) <p style="text-align: center;">Questions and answers, and discussion</p>
12:30 – 14:00	Lunch
14:00 – 15:30	Three parallel working groups: <ul style="list-style-type: none"> ➤ Topic 1: The regional dimension of skills (moderated by Lida Kita, ETF) Chair: Gökhan GÜDER, Head of the Department of Employment and Working Life, MoD Speaker: Geoff FIELDSEND, former Director of Policy and Research, UKCES – UK Commission for Employment and Skills ➤ Topic 2: Inclusive growth and skills development (moderated by Cristina Mereuta, ETF) Chair: Ali Ercan SU, EU Expert, EU Coordination Department, MoLSS Speakers: İŞKUR representatives, Güneş AŞIK ALTINTAŞ, Economist, TEPAV

	<p><u>Topic 3: Matching skills supply and demand (moderated by Arjen Deij, ETF)</u></p> <p>Chair: İsmail DEMİR, Head of Educational Policies and Programmes, Department, DG for LLL, MoNE</p> <p>Speaker: Prof. Dr. Füsün AKKÖK, Middle East Technical University (METU)</p>
15:30 – 16:00	Coffee / tea break
16:00 – 17:00	<p>Chair: Arjen DEIJ, Senior Specialist in Qualifications Systems, ETF</p> <p>Reporting back from the three working groups</p> <p>Questions and answers, and discussion</p>
17:00 – 17:30	<p>Concluding remarks</p> <ul style="list-style-type: none"> ➤ Gökhan GÜDER, Head of the Department of Employment and Working Life, MoD ➤ İsmail DEMİR, Head of Educational Policies and Programmes Department, DG for LLL, MoNE ➤ Ali Ercan SU, EU expert, EU Coordination Department, MoLSS ➤ EU Delegation to Turkey ➤ ETF

Annex 3: HRD Governance Matrix²⁰

Institution	Main function	Role in policy cycle	Role in governance of HRD	Level of governance	Other relevant information
MoNE	Ministry of National Education	Agenda setting Policy formation Policy implementation Policy review	At primary and secondary levels: In charge of all aspects of education at public schools; and the development and setting of curricula and educational standards, teacher accreditation at private schools.	National	
MoNE (VET system)	DG for Vocational and Technical Education	Agenda setting Policy formation Policy implementation Policy review	At primary and secondary levels: In charge of all aspects of vocational education at public schools; and development and setting of curricula and educational standards, teacher accreditation at private vocational schools.	National	VET and labour market training are covered by MoNE's DG for Vocational and Technical Education, and İŞKUR. There is no commonly agreed upon strategy concerning VET education and labour market training.
YÖK	Higher Education Council of Turkey	Agenda setting Policy formation Policy implementation Policy review	Launch of new degree programmes; minimum criteria for appointment and promotion of academics at universities; accreditation of degrees granted by Turkish universities; approval of the equivalence of degrees earned abroad; approval of the deans and nomination of rectors at public universities.	National	Higher education strategy of Turkey is available [in Turkish] at: http://www.sp.gov.tr/upload/xSPTemelBelge/files/50uHo+Turkiyenin_Yuksekogretim_Stratejisi.pdf
MoLSS	Ministry of Labour and Social Security	Agenda setting Policy formation	Coordination of IPA HRD management.	National	
İŞKUR	Turkish Employment Agency	Policy formation Policy implementation	İŞKUR is the employment agency of Turkey and is active in the organisation and delivery of labour market training courses.	National	VET and labour market training are covered by MoNE's DG for Vocational and Technical Education, and İŞKUR. There is no commonly agreed upon strategy concerning VET education and

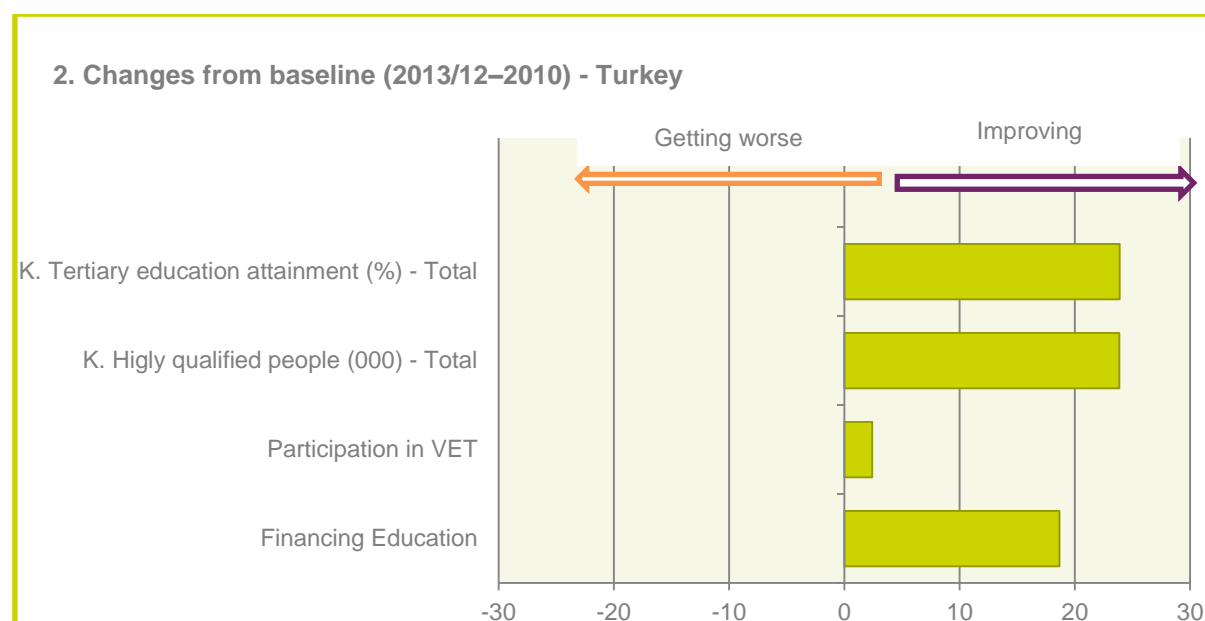
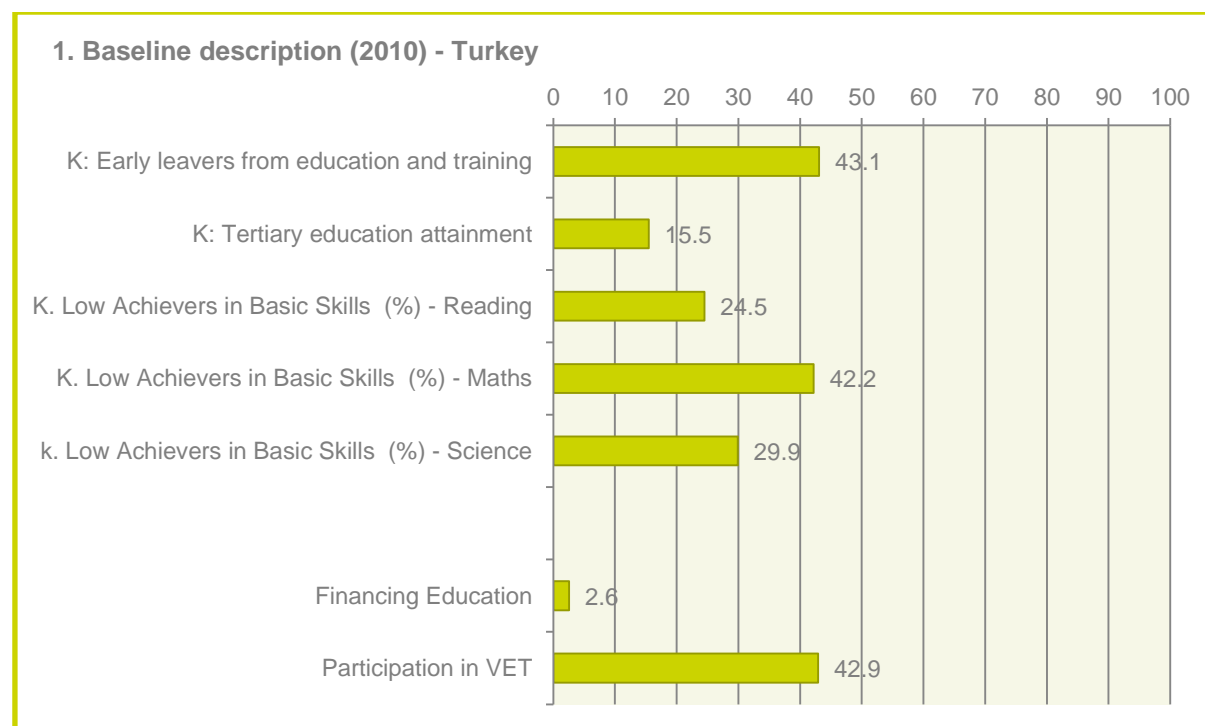
²⁰ For the purposes of FRAME, the HRD sector is considered to cover secondary education, higher education, VET and labour market training.

					labour market training.
Municipalities	Municipality	Policy implementation Policy review		Local	Municipalities also offer labour market training courses at a local level.
VQA	Vocational Qualifications Authority	Agenda setting Policy formation Policy implementation Policy review	TQF Euroskills Occupational standards Qualification standards	National	LLL NQF
TISK	Turkish Confederation of Employer Association	Agenda setting Policy formation Policy review	Policy co-design and evaluation; member of national councils and committees in HRD policy design, implementation and evaluation.	National	HRD policy design, implementation and evaluation management
TESK	Confederation of Turkish Tradesmen and Craftsmen (especially in vocational and technical education)	Agenda setting Policy formation Policy implementation Policy review	Policy co-design and evaluation; member of national councils and committees in HRD policy design, implementation and evaluation.	National	HRD policy design, implementation and evaluation management
TOBB	Union of Chambers and Commodity Exchanges of Turkey	Agenda setting Policy formation Policy implementation Policy review	Policy co-design and evaluation; member of national councils and committees in HRD policy design, implementation and evaluation.	National	HRD policy design, implementation and evaluation management
HAK-İŞ	Confederation of Turkish Real Trade Unions	Agenda setting Policy formation Policy review	Policy co-design and evaluation; member of national councils and committees in HRD policy design, implementation and evaluation.	National	HRD policy design, implementation and evaluation management
TURK-IS	Confederation of Turkish Trade Unions	Agenda setting Policy formation Policy review	Policy co-design and evaluation; member of national councils and committees in HRD policy design, implementation and evaluation.	National	HRD policy design, implementation and evaluation management
TÜBİTAK	General Education	Policy implementation		National	

Annex 4: Monitoring graphs²¹

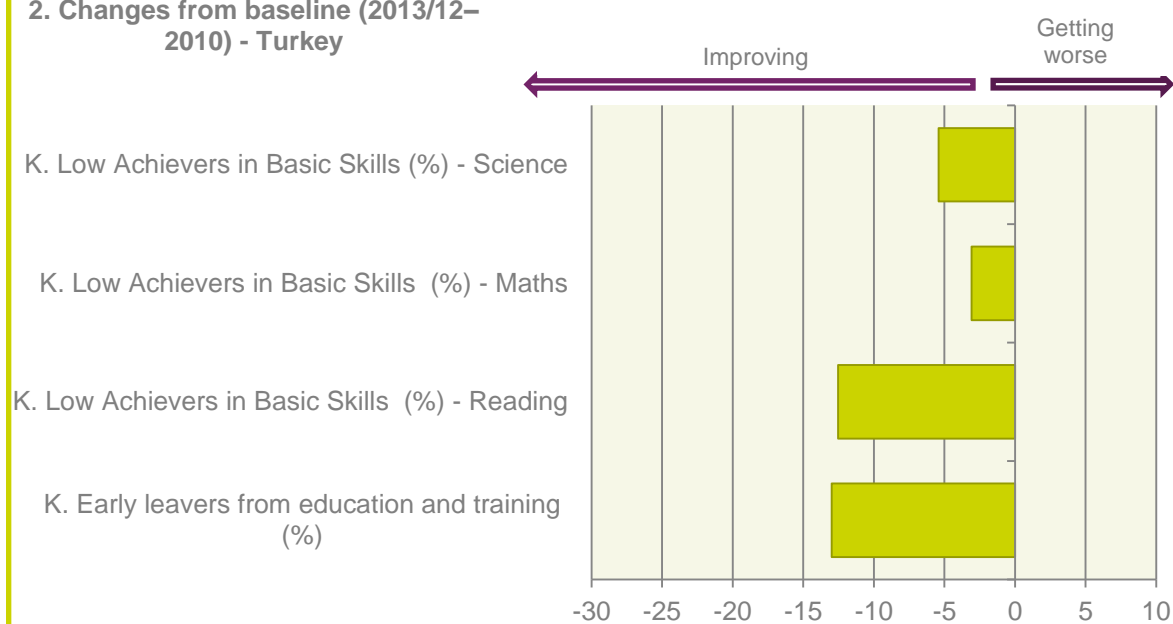
Policy area 1: Improving education and training system

(raising skills levels, acquisition of key competencies, preventing early school leaving, etc.)

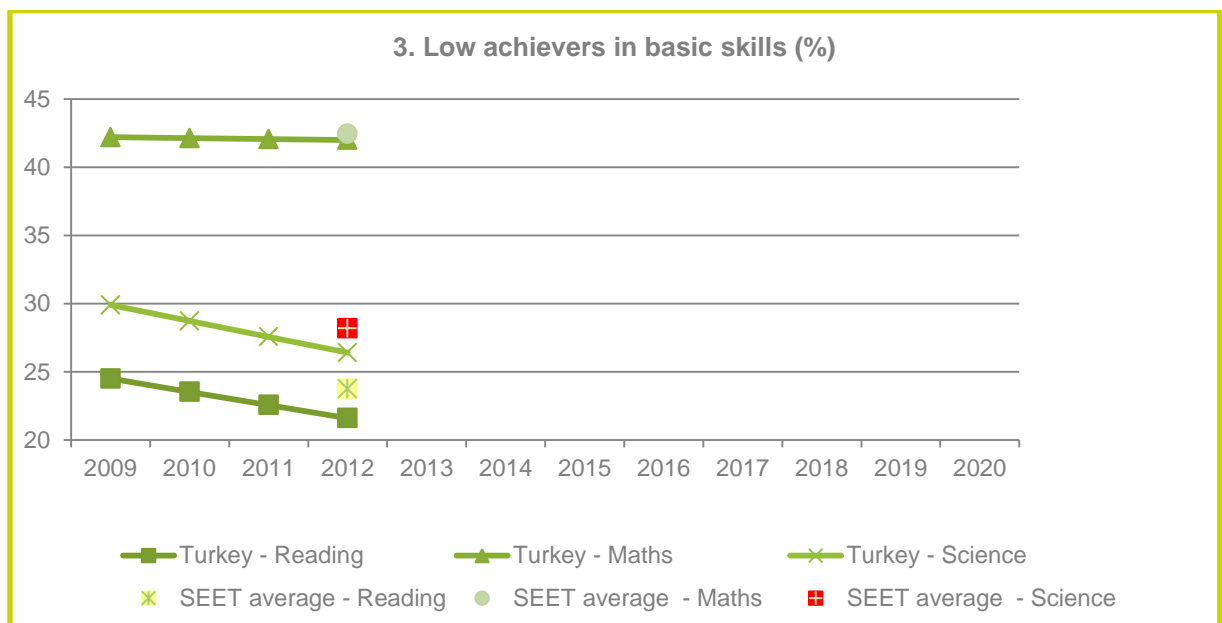
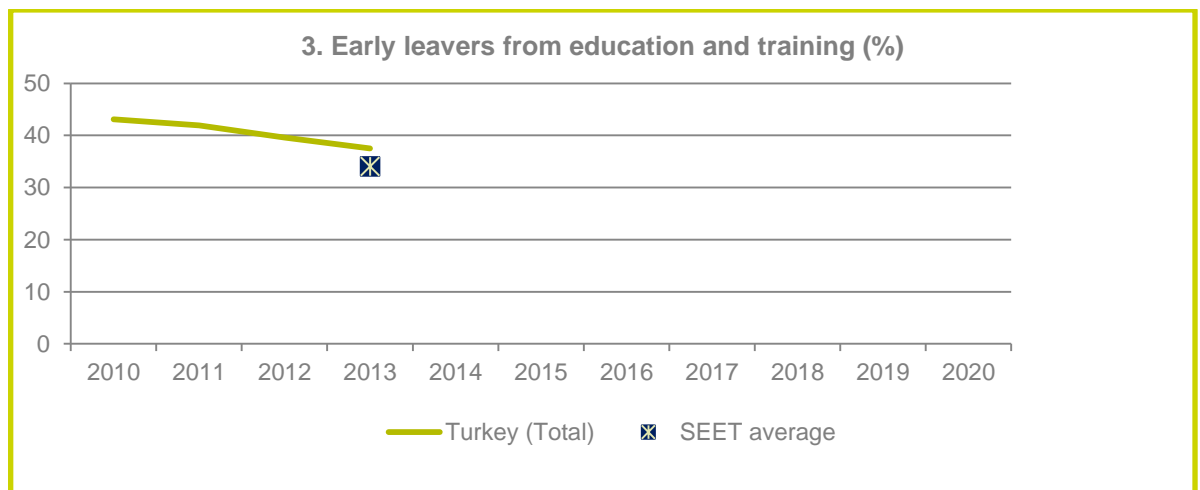
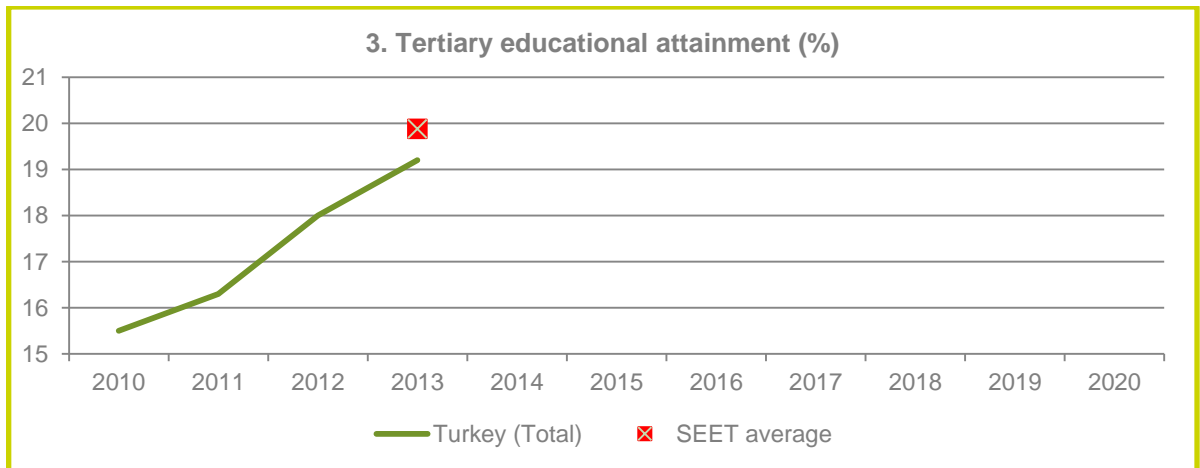


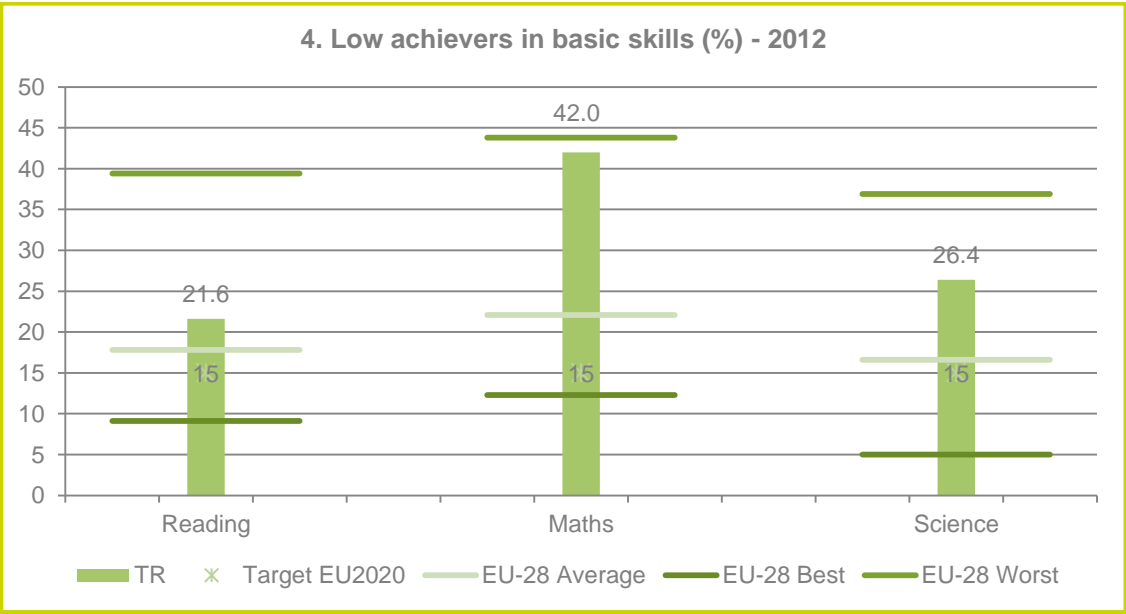
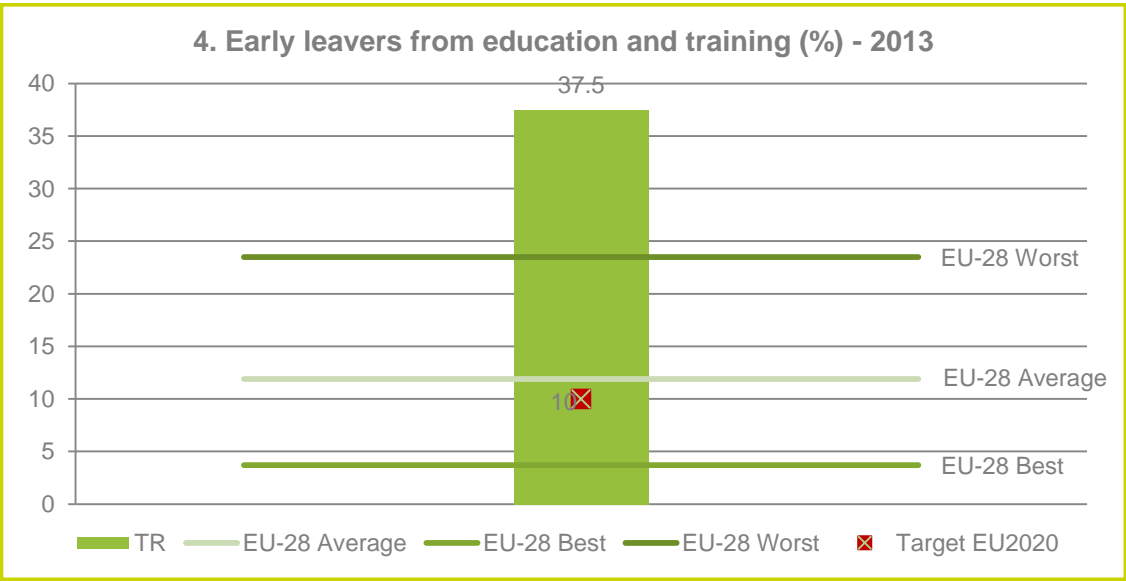
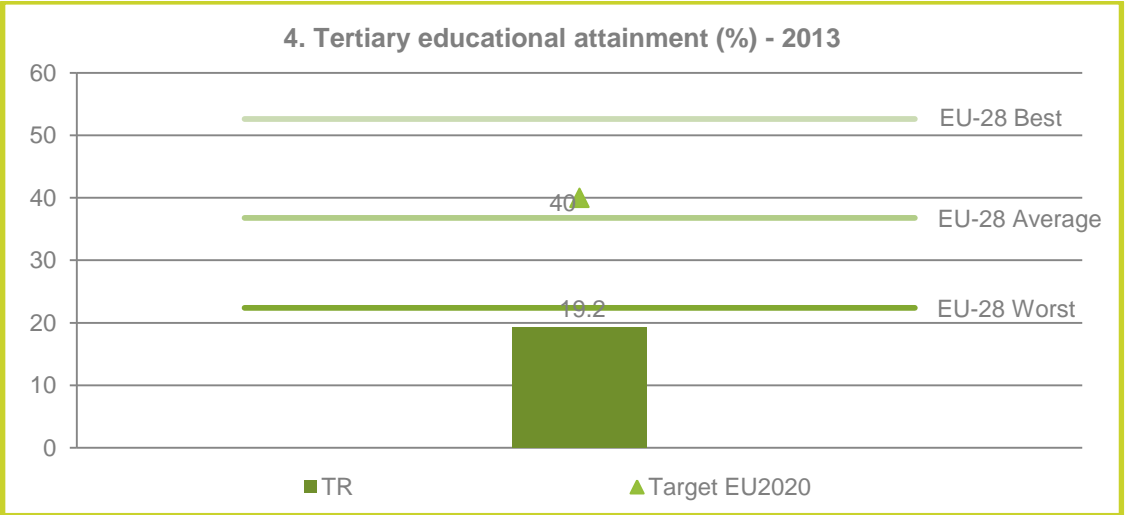
²¹ Data Sources: Eurostat and TURKSTAT

2. Changes from baseline (2013/12–2010) - Turkey



Trends and regional benchmarking

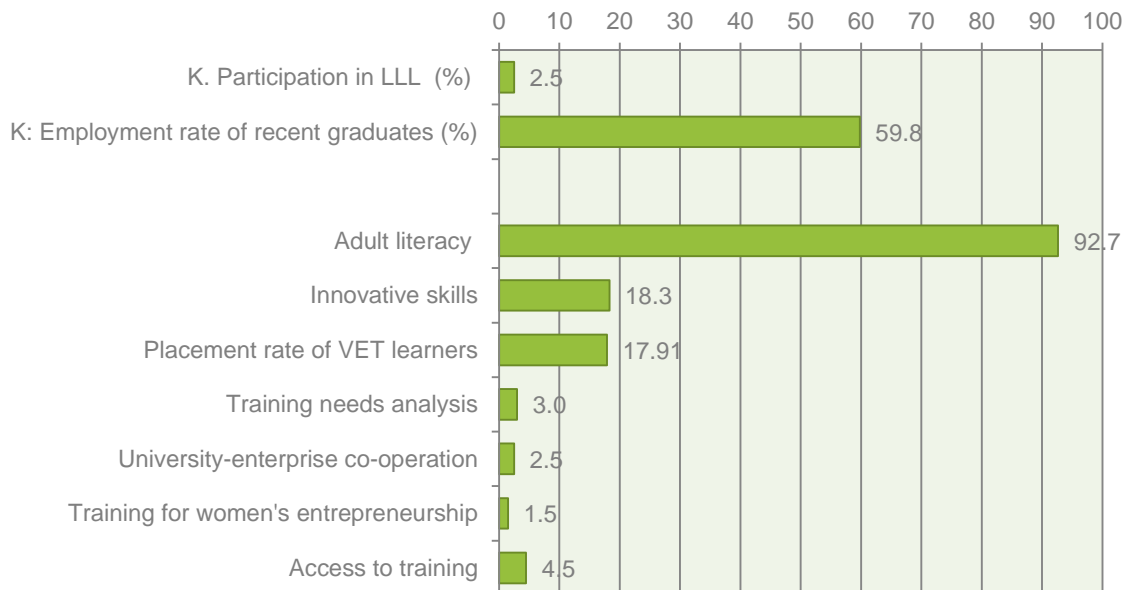




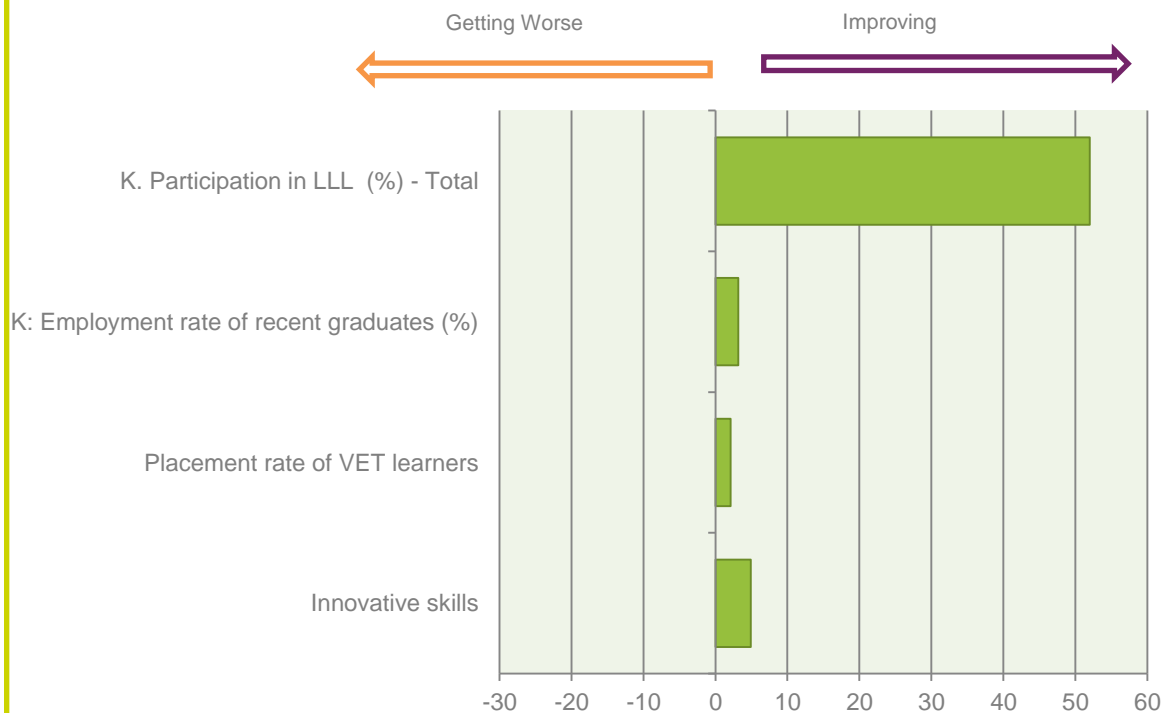
Policy area 2: Improving skills supply and productivity, lifelong learning

(adaptation of the labour force skills to labour demand; ALMP measures and training measures, etc.)

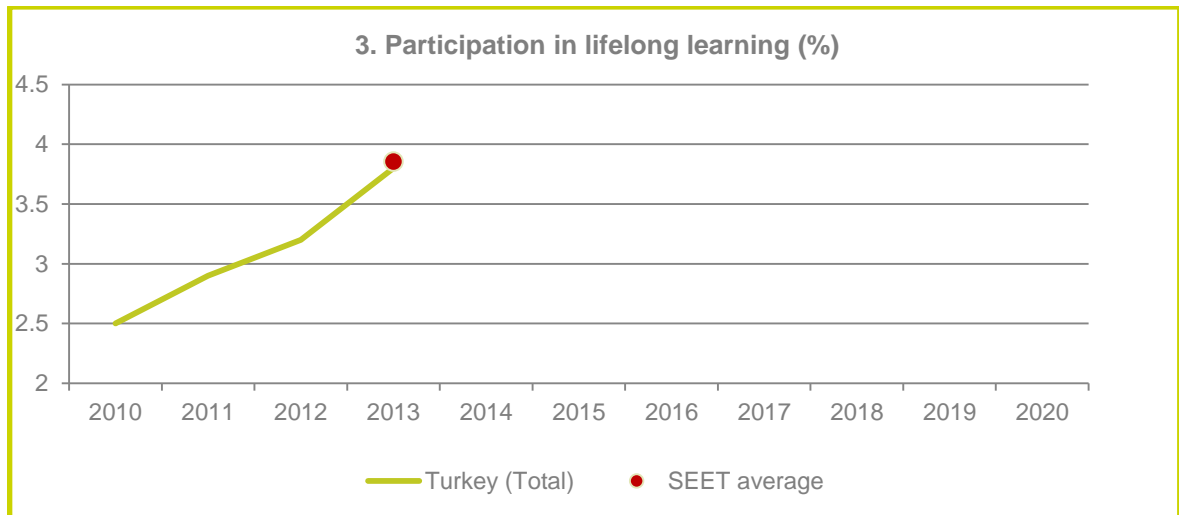
1. Baseline description (2010) - Turkey



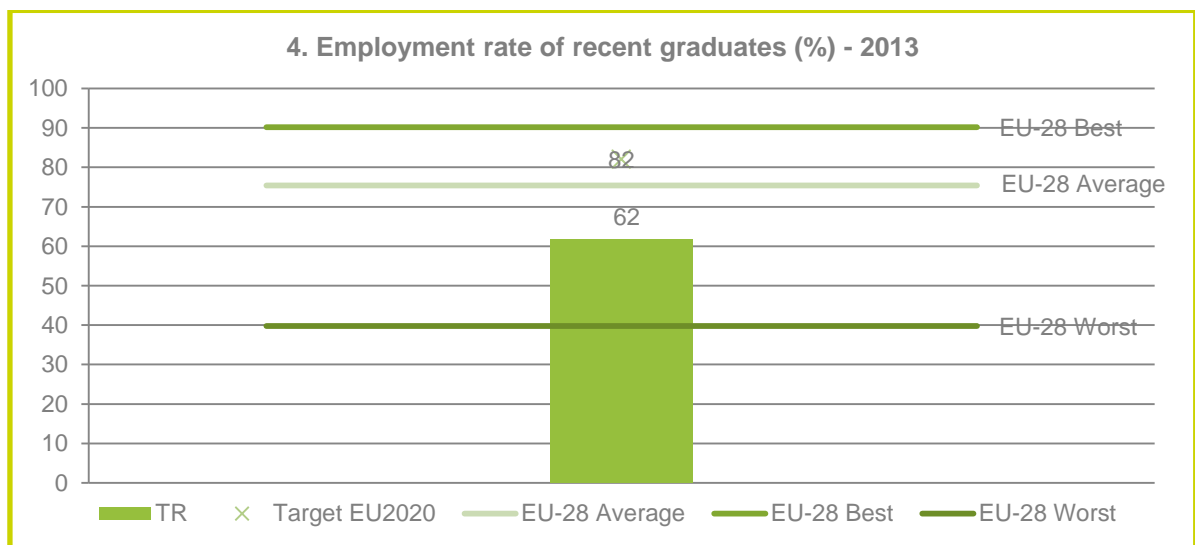
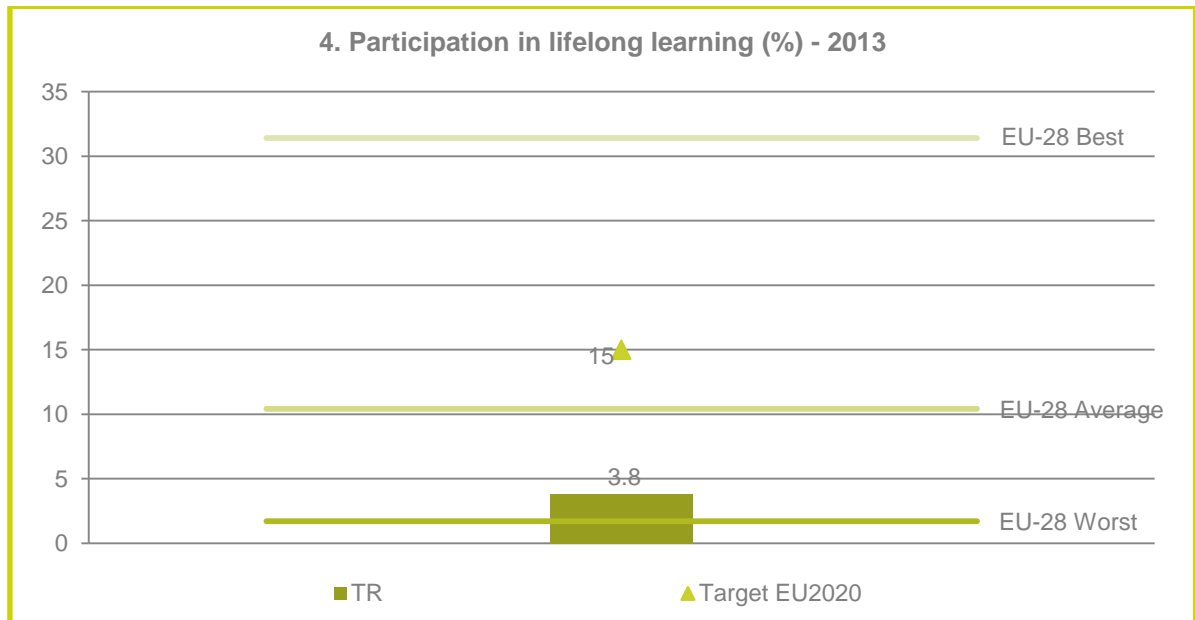
2. Changes from baseline (2010–2013) - Turkey



Trends and regional benchmarking



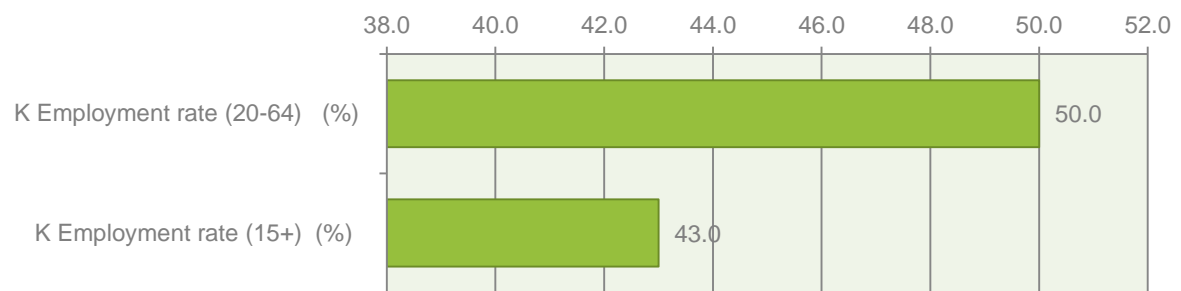
EU benchmarking



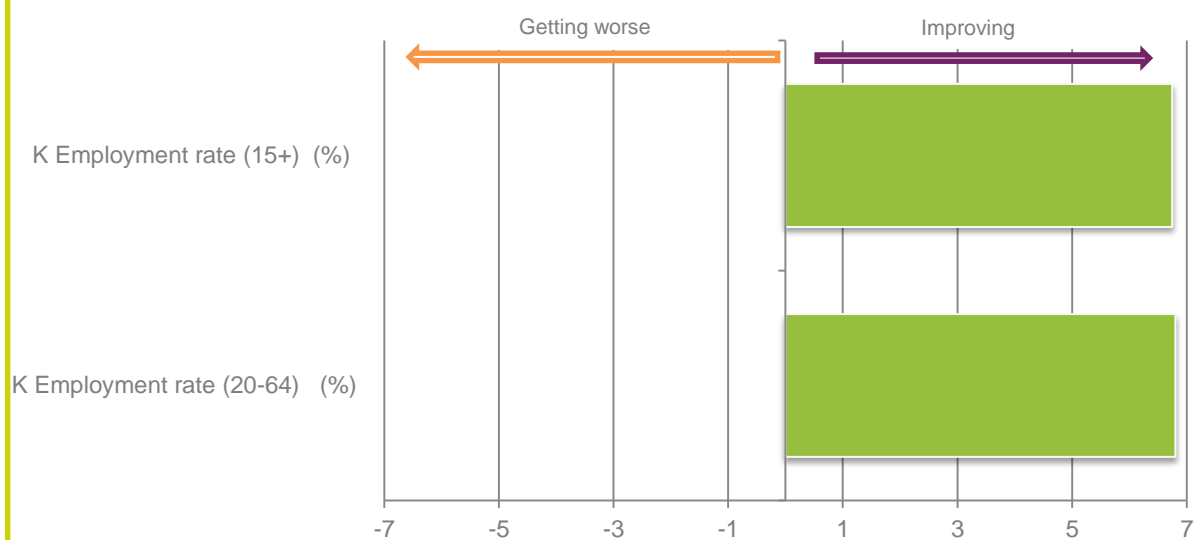
Policy area 3: Increase labour market participation

(employment, unemployment, labour market participation of specific groups, etc.)

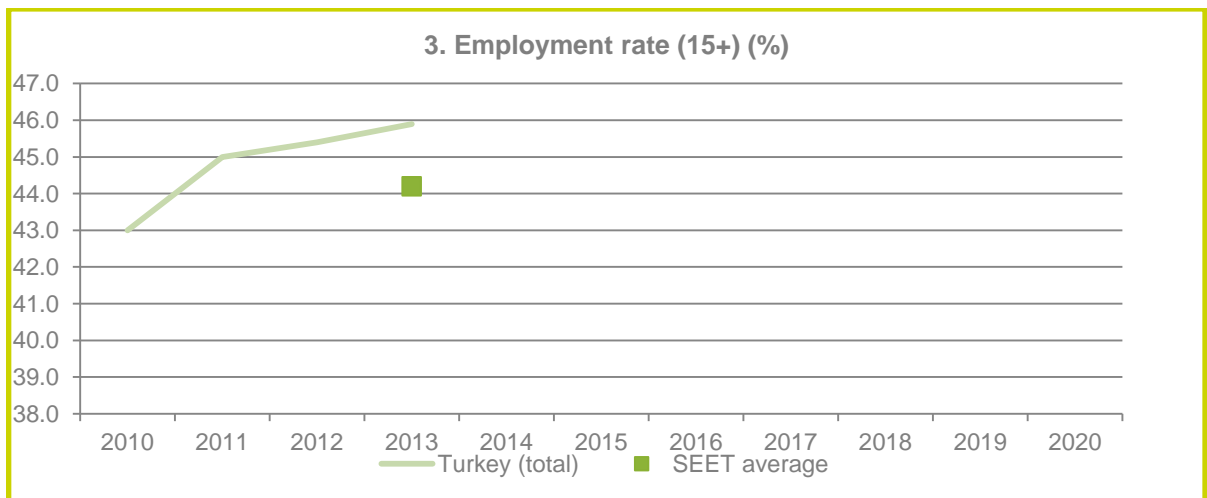
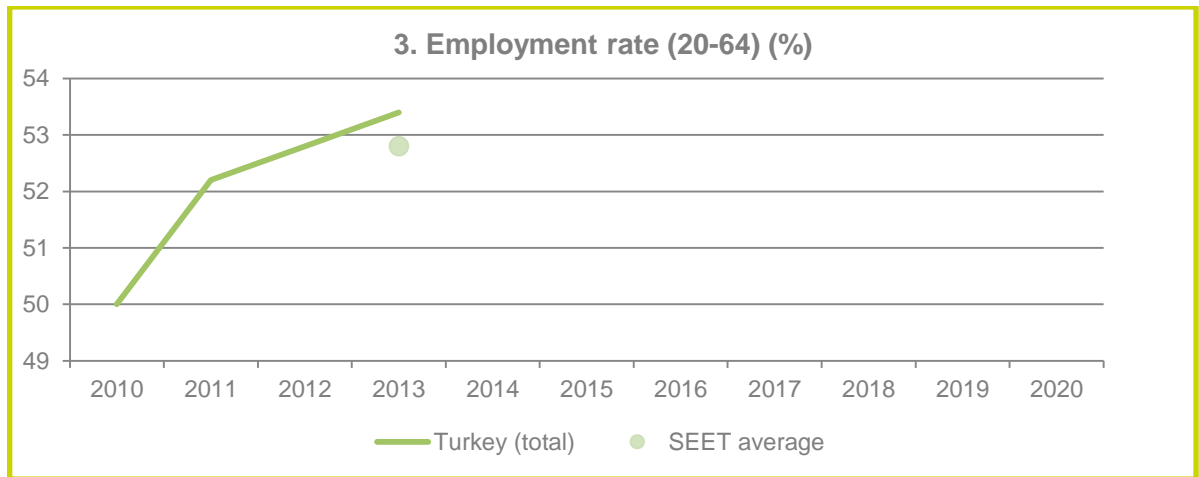
1. Baseline description (2010) - Turkey



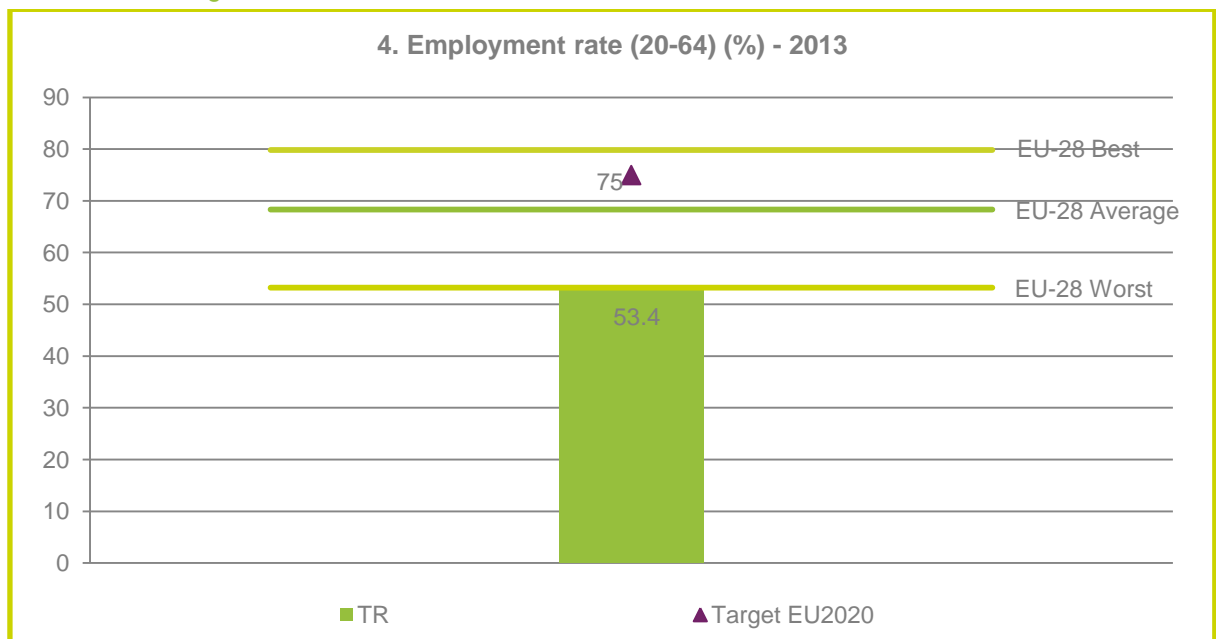
2. Changes from baseline (2010–2012/13) - Turkey



Trends and regional benchmarking



EU benchmarking



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