

The Evolving Role of the State in the 15th Year of Türkiye Social Security System Reform

Türk Sosyal Güvenlik Sistemi Reformunun 15. Yılında Devletin Değişen Rolü

Abdulhalim Çelik¹  Kübra Yavuz² 

¹(Asst. Prof. Dr.), Kocaeli University, Hereke Ömer İsmet Uzunyol Vocational School, Kocaeli, Türkiye

²(Asst. Prof. Dr.), Ağrı İbrahim Çeçen University, Patnos Vocational School Department of Social Service, Ağrı, Türkiye

ABSTRACT

In the 15th year of social security reform in Turkey, this study investigates the role of the state in social security. The study's goal is to critically evaluate the state's participation in social security services in Turkey and to discuss Turkey's future reform demand in the field of social security, taking into account relevant legal regulations, policy documents, and the distribution of social expenditures. Using a qualitative research approach, the study examines the distribution and repercussions of social protection expenditures by risk group. The data used in the study came from government reports and statistics. The findings suggest that the Turkish social security system's inclusiveness has risen in the post-reform period, although the system still faces substantial issues. On the other hand, social security spending is always rising, and irregularities in the asset-liability ratio endanger its financial sustainability. Furthermore, the Covid-19 pandemic in 2019 and the victims of delayed pension age regulation in 2023 exacerbated the bad scenario. As a result, new reform expectations evolved in the Turkish social security system before the second decade of reform was completed.

ÖZ

Bu çalışma, Türkiye'deki sosyal güvenlik reformunun 15. yılında devletin sosyal güvenlikteki rolünü incelemektedir. Çalışmanın amacı, ilgili yasal düzenlemeleri, politika belgelerini ve sosyal harcamaların dağılımını dikkate alarak, Türkiye'de devletin sosyal güvenlik hizmetlerine katılımını eleştirel bir şekilde değerlendirmek ve Türkiye'nin sosyal güvenlik alanında gelecekteki reform talebini tartışmaktır. Nitel bir araştırma yaklaşımı kullanarak, çalışma risk gruplarına göre sosyal koruma harcamalarının dağılımını ve sonuçlarını analiz etmektedir. Araştırmada kullanılan veriler, resmi kurumların raporlarından ve istatistiklerinden elde edilmiştir. Bulgular, reform sonrası dönemde Türk sosyal güvenlik sisteminin kapsayıcılığının arttığını, bununla birlikte sistemin önemli zorluklarla karşı karşıya olduğunu göstermektedir. Sosyal koruma harcamaları sürekli olarak artmakta ve aktif pasif oranında yaşanan anomaliler, finansal sürdürülebilirliği tehdit etmektedir. Ayrıca, 2019 yılındaki Covid-19 pandemisi ve 2023 yılında yürürlüğe giren emeklilikte yaşa takılanlar düzenlemesi, bu olumsuz tabloyu daha da derinleştirmiştir. Sonuç olarak, reformun henüz ikinci on yılı tamamlanmadan, Türk sosyal güvenlik sisteminde yeni reform beklentileri ortaya çıkmıştır.

Keywords: Covid-19, Insurance, Social Protection, Social Security Reform, Victims of Delayed Pension Age

Anahtar Kelimeler: Covid-19, EYT, Sosyal Güvenlik Reformu, Sosyal Sigorta, Sosyal Koruma

Introduction

Social security, as defined by the International Labor Organization (ILO), encompasses the protective measures that societies employ to ensure access to healthcare and income security, addressing various life circumstances such as old age, unemployment, sickness, disability, work-related accidents, maternity, and the loss of a breadwinner. It is widely recognized as a fundamental human right and a primary responsibility of the state to safeguard the well-being and dignity of individuals and households (ILO, 2022). The provision of social security, consisting of contributory pension and unemployment protection, healthcare, and social assistance, financed through taxation, has become a universal imperative in our interconnected world.

Amidst the prevailing global discourse, it is evident that the establishment and preservation of social security systems have undergone significant transformations throughout history. Notable reports such as the World Bank's seminal study, "Averting

Corresponding Author: Abdulhalim Çelik **E-mail:** abdulhalimcelik@hotmail.com

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the Old Age Crisis" (James, 1995), and the ILO's visionary work, "Into the Twenty-First Century: The Development of Social Security" (ILO, 1984), have propelled countries to embark on comprehensive reforms, combining state-led initiatives with individual contributions, in order to adapt social security systems to evolving economic and social landscapes.

However, despite the progress achieved, substantial challenges persist, as a significant portion of the world's population remains devoid of adequate social protection. Alarming statistics reveal that only 46.9% of the global population benefits from at least one social protection program, leaving approximately 4.1 billion individuals, or 53.1% of the global population, without any form of coverage (ILO, 2021:19). Bridging this gap and extending the benefits of social security to all is a pressing priority for nations worldwide

Following the aftermath of the Second World War, developed countries experienced a golden age of welfare, characterized by robust social security systems tailored to the needs of industrial societies. These systems were hailed as remarkable achievements in tackling diverse social issues (van Kersbergen, 2016: 270). However, over time, different welfare state typologies have encountered demographic shifts, economic fluctuations, financial constraints, and political complexities. These challenges necessitated revisions to existing welfare state rules, as witnessed in the reform initiatives undertaken by countries such as Germany, the United Kingdom, and Denmark, with a particular focus on addressing unemployment (Kalkan, 2022: 100).

In Turkey, the social security system shares similarities with Southern European countries, relying on insured contributions while grappling with the inclusion of a substantial uninsured population. The system also confronts the imperative of closing social security deficits through budget transfers, with the family assuming a crucial role in fostering social solidarity within the framework. Nonetheless, Turkey faces obstacles in achieving comprehensive population coverage and ensuring sustainable funding, exacerbated by differing standards among social security organizations and the prevalence of informal employment.

As Turkey commemorates the 15th anniversary of its social security reform, significant developments have reshaped the role of the state in social security. The global COVID-19 pandemic has accentuated the critical importance of social security systems and the indispensable role of state intervention during times of crisis. Simultaneously, the local issue of victims of the delayed pension age (EYT) regulation has ignited a fervent debate, shedding light on the state's responsibility in guaranteeing social security for retirees. This article aims to critically examine the multifaceted role of the state in social security reform in Turkey, considering both legal regulations and the allocation of social expenditures. Additionally, it delves into the implications of these recent developments, analyzes the challenges faced, and identifies the potential opportunities that lie ahead in shaping the future of social security in Turkey.

The Evolution of Social Security Systems Worldwide: A Historical Perspective

Social security has a long history, beginning with various forms of social protection for the disadvantaged members of society (Güvercin, 2004:90). However, it was not until the eighteenth century that these aids could be institutionalized. Prior to the nineteenth century, social security practices were diverse, including religious charities such as the Christian tithe and Islamic zakat (Abel-Smith, 2023). The sixteenth century saw the emergence of state-created aid institutions and traditional relief organizations, with legislation in various countries requiring populations to contribute taxes to support the poor. England's Elizabethan Poor Laws established welfare benefits, while the 17th century saw philosophical thought emphasizing the state's responsibility to protect the welfare of all inhabitants. The French Revolution introduced new ideas on poverty and proposed remedies for employment and medical help. However, tangible progress was limited until the early nineteenth century due to implementation difficulties. The rise of industrialization and urbanization led to increased poverty and the establishment of help institutions and processes (Güvercin, 2004:90).

In the late nineteenth century, Chancellor Otto von Bismarck introduced the first modern social insurance policy in Germany, marking the beginning of the age of social insurance (Cutler and Johnson, 2004; Hu and Patrick, 2010:125). This idea expanded to other countries like France, the United Kingdom, and the United States, encompassing health insurance and retirement benefits (Titmuss, 1974). The development of social insurance was supported by industrialization, working-class movements, and the recognition of the state's responsibilities. The United Kingdom relied on self-help methods through friendly societies and savings banks. However, a focus solely on workers in social insurance led to societal disparities. The Great Depression and World Wars highlighted the need for social protection across all segments of society, leading to the era of social security with a more interventionist role for the state. Social security aimed to safeguard not only workers but also children, the elderly, the disabled, the unemployed, and low-income families. The state's involvement expanded to include non-contributory measures such as social aid and services, promoting a social state understanding and emphasizing social justice and equality (Kuhnle and Sander, 2010).

During the age of social security, the state sought to reduce economic disparities and establish equitable wealth distribution. Workers' rights were protected through constitutional and legal procedures, improvements were made to working conditions, and social rights were granted. The state provided a basic standard of living for the lowest income group through social expenditures, including education and healthcare (Tokol and Alper, 2017:32). Public entrepreneurship was employed to participate in markets

and promote equal income distribution. Arbitrary interventions were prohibited, and social rights were legally protected. The welfare state approach aimed to address social issues holistically, balancing the preservation of the capitalist economic order with increased financial allocation to sectors impacting the less privileged members of society. The theoretical foundations of the welfare state were outlined in William Henry Beveridge's 1942 report, emphasizing the imperative of eliminating income disparities and fostering social justice and equality (Palley, 2018: 3).

The welfare state reached its peak during the period between the late 1940s and mid-1970s, often referred to as the "golden age." During this time, the state played a central role in financing and organizing various social security measures such as health, employment, housing, and full employment policies. However, from the mid-1970s onwards, economic, political, and social crises started to challenge the welfare state. Factors such as population aging, increased divorce rates, and high unemployment led to rising costs of social security, while globalization eroded social safety networks. These challenges, along with ideological changes favoring neoliberal policies, sparked a wave of reforms aimed at reducing the state's role and emphasizing individual responsibility (Pierson, 1996; Esping-Andersen, 2000).

The 1980s marked the beginning of a new era for social security, characterized by privatization, marketization, and cost containment measures. Countries such as the United Kingdom, New Zealand, and Chile implemented radical reforms, introducing market mechanisms into social security systems. Privatization of pensions, contracting out public services, and promoting individual savings became popular strategies (Esping-Andersen, 2000; Dixon and Hyde, 2002). These reforms were driven by a desire to limit the state's financial burden, encourage individual self-reliance, and create competitive markets. However, the outcomes of these reforms were mixed, with some countries experiencing increased efficiency and others facing inequality and reduced coverage (Diamond, 1993; De Vogli, 2014).

The global financial crisis of 2008 had a significant impact on social security systems around the world. The crisis resulted in higher rates of unemployment and poverty, putting additional strain on social security expenditures. Governments were faced with the challenge of assisting individuals affected by the crisis while also attempting to decrease budget deficits. This resulted in a rethinking of neoliberal policies and a shift toward increasing social spending (OECD, 2011). The data in Table 1, which includes OECD nations' social expenditures between 1990 and 2019, show that following the 2008 financial crisis, public social expenditures increased in several countries (OECD, 2023). The crisis exposed the flaws in market-oriented social security systems, raising concerns about the sufficiency and sustainability of private solutions (Clasen and Clegg, 2011; Mc Cord, 2010).

Table 1. Public Social Expenditures in Some OECD Countries (1990-2019)

Country	1990	1995	2000	2005	2010	2015	2018	2019
Canada	17,5	18,3	15,7	16,1	17,6	17,9	18	-
Chile	9,8	11	10,4	8,9	10,6	10,9	11,3	11,4
France	24,4	28,5	27,7	28,8	31,1	31,8	31,1	31
Germany	21,4	25,2	25,5	26,4	26	25	25,3	25,9
Italy	20,6	21,1	22,6	24,1	27	28,3	27,8	28,2
Japan	10,9	13,2	15,4	17,1	21,2	22,2	-	-
Korea	2,6	3	4,4	5,9	7,9	9,6	10,8	12,2
Holland	23,7	22,1	19	19,9	17,5	17,6	16,2	16,1
Portugal	12,2	16	18,5	22,3	24,5	24	22,5	22,6
Spain	19,1	20,6	19,5	20,5	24,9	24,7	24,2	24,7
Sweden	26,9	30,2	26,5	27,1	25,9	26,2	25,8	25,5
Türkiye	3,8	3,4	7,5	10,1	12,3	11,6	12,2	12
United Kingdom	14,9	16,6	16,9	19,3	23,3	21,5	20,3	20,6
Usa	13,2	14,9	14,1	15,5	19,1	18,5	18,2	18,7
OECD	16,5	18,2	17,5	18,3	20,6	20,2	19,8	20

Kaynak: OECD (2023).

The International Labour Organization (ILO) campaigned for enhanced social security systems around the world in response to the problems brought by the global financial crisis. The International Labour Organization's Recommendation on National Floors of Social Protection issued in 2012 advocated for comprehensive social protection for all individuals, regardless of job position or income level (ILO, 2012). Beyond social insurance, the concept of social protection encompassed a broader range of measures such as social assistance, access to critical services, and labor market regulations (Kapar, 2015:192). The suggestion stressed the necessity of comprehensive and sustainable social security systems that offer enough protection for individuals throughout their lives (ILO, 2012).

In conclusion, social security has evolved over centuries, starting from diverse forms of social protection and gradually institutionalizing into modern social insurance systems. The welfare state approach emerged in the twentieth century, aiming to reduce economic disparities and provide comprehensive social protection. However, the welfare state faced challenges in recent decades due to globalization, population aging, and changing social and economic structures. This led to reforms that emphasized individual responsibility, privatization, and marketization. The 2008 financial crisis further highlighted the importance of robust and inclusive social security systems. The ILO has played a significant role in advocating for comprehensive social protection and promoting the idea of national floors of social protection.

Historical Development and Reform of the Turkish Social Security System

Social security systems appear as structures that adapt in response to social changes and requirements. Turkey's social security system has also evolved as a result of this process. Social insurance legislation is continually changing and being renewed in order to respond to changes in the country's economic, social, and cultural life. Changes include the inclusion of new social groups, the enhancement of rights, and the adaptation to new types of employment such as flexible working.

The Ottoman Empire laid the foundation for Turkey's social security system, but it was not until the Republican period that comprehensive institutional and legal regulations were implemented. Statute 151, which governed the working conditions of mine workers in the Ereğli Basin prior to the Republic's proclamation, played a pivotal role in shaping the early provisions of social security (Özmen, 2017). This statute, primarily focusing on labor law, also included provisions pertaining to social security, such as employer obligations in case of workplace accidents and the establishment of mutual assistance funds for workers. These funds eventually merged under the name Amele Union, forming the bedrock of Turkey's social insurance system. With the advent of the Republican era, the number of mutual aid funds providing social security to workers witnessed a significant expansion, encompassing various sectors, including civil servants. However, the surge in the number of beneficiaries posed financial challenges for these state-guaranteed funds, leading to their financing from the State budget until 1949 (Özmen, 2017).

During this historical period, the establishment of the Social Security Institution and the Pension Fund marked important milestones in the development of Turkey's social security system (Güzel et al., 2014). Initially, the social security system primarily catered to specific occupational groups. Nonetheless, subsequent legislation and reforms aimed to extend coverage and provide broader protection (Yaşar, 2017). The 1961 Constitution emphasized social security as a fundamental right, fostering the institutionalization of the country's social security system through the establishment of dedicated institutions and the recognition of workers' rights (Güzel et al., 2014).

During the 1970s, Turkey experienced a period of crisis characterized by a weakening sense of social rights and the emergence of policies encouraging flexible accumulation (Topak, 2012: 211). Following IMF assistance in the aftermath of the 1979 oil crisis, the country shifted to a free market economy, abandoning the import substitution development model. The 1970s import substitution industrialization paradigm was supplanted by this shift toward liberal market practices and global economic integration (Buğra, 2011: 198; Kökalan Çımrın and Durdu, 2015). Because of the IMF's emphasis on implementing liberal policies, state social welfare spending has been reduced, particularly in areas such as social insurance, retirement, and healthcare (Buğra, 2011: 198).

In the 1990s, Turkey's social security system was in a disastrous crisis, unable to keep its promises and on the verge of collapse. The chronic nature of the problems demanded more than short-term fixes, but coalition governments failed to take necessary steps, worsening the system's troubles. As significant social security agencies such as the Pension Fund, SSK, and Ba-Kur struggled to meet their employees' salary requirements, this situation caused worry and concern. Desperate for finances, these organizations' and the government's managers attempted to dissolve their assets, exacerbating the problem (Alper, 2019:79).

Uninsured work, nonpayment of premiums, political exploitation of social security funds, premium amnesties, borrowing practices, early retirement regulations, and insufficient state engagement in funding were all contributing reasons to the crisis (Alper, 2018:33). As a result, Law No. 4447 was enacted as a reform measure, with the goal of achieving a balanced income-expenditure ratio for social insurance institutions. The reform included provisions such as establishing a minimum retirement age, specifying minimum pension contribution periods, and connecting pension calculations to lifetime earnings. The adjustments, however, had unforeseen repercussions, such as increasing the burden on enterprises, resulting in an increase in informal employment, a

reduction in competitiveness, and a contraction in production and employment (IMF, 2000:28; Alper, 2019:193). While the reform was primarily concerned with deficit reduction, it missed critical goals such as expanding social security resources and fostering international competitiveness.

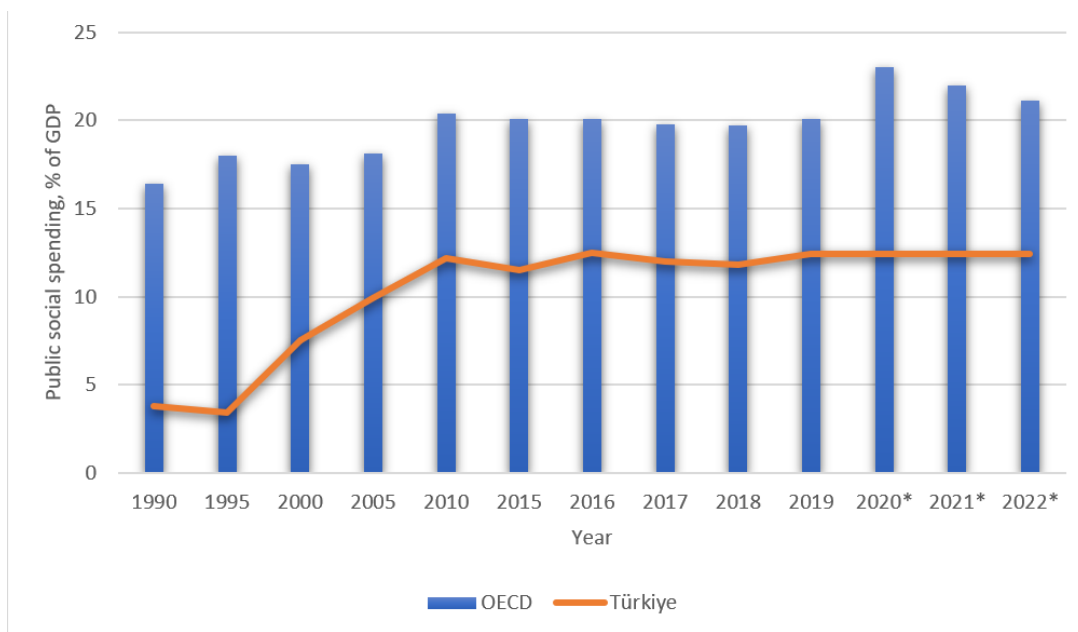
The November 2000 and February 2001 crises hindered the full implementation of Law No. 4447, also known as the Unemployment Insurance Law (Angın, 2019: 436). The crises expanded the scope and deficits of social security, prompting further reforms in 2002 as part of an emergency action plan (SGK, 2013:xiv). The introduction of Law No. 5502, the "Social Security Institution Law," in 2006 marked a significant step in restructuring the social insurance system in Turkey. It consolidated multiple institutions into a single entity, the Social Security Institution (SGK), which aimed to ensure universal access to social security, strengthen the system's sustainability, and provide equitable social assistance (Alper, 2011:142).

Law No. 5510, which went into effect in 2008, aimed to create a more inclusive, financially viable, and efficient social security system. It encompassed four major components: general health insurance, a comprehensive assistance system, a unified pension scheme, and an improved institutional structure (Öğütoğulları and Akpınar, 2020: 218-219). However, the implementation of the law faced challenges, with the Constitutional Court ruling certain regulations as violating vested rights, resulting in postponements and revisions (Güzel et al., 2014: 95-96). Despite subsequent revisions, Law No. 5510 remained one of the most significant reform efforts in the Turkish social security system, focusing on coverage, financial sustainability, and service efficiency (Alper, 2016: 1256; MD, 2014: xii; Alper, 2017: 3).

The reform aimed to extend social security coverage to the entire population, including non-contributory payment systems for those in need (Alper, 2016: 1256). Financial sustainability was addressed through adjustments in pension parameters and expenditure management, although meeting the reform's financial objectives remained a challenge (MD, 2014: xii; Alper, 2017: 3). Service efficiency improvements included facilitating access to healthcare services and implementing e-insurance applications to streamline transactions (SGK, 2022c; Alper, 2017: 2-11). While there were still some issues to address, the reforms aimed to create a more people-oriented system and enhance accessibility for citizens (Alper, 2017: 2-11).

The Role of the State in Social Security in Turkey in the 15th Anniversary of the Social Security Reform

As previously noted, the historical evolution of social security in Turkey has taken a different path from that of traditional welfare states in the West. Welfare regime studies indicate that Turkey has characteristics with welfare regimes in Southern Europe (Kesgin, 2012). The state is not primarily responsible for social programs under Southern European welfare regimes. The gap left by the state, which is poor in terms of social policy, is supposed to be filled primarily by the family. The care of underprivileged groups in society, for example, is essentially the responsibility of the family. As a result, as compared to industrialized civilizations, the state's social expenditures are always modest in Turkey (see Figure 1).



Source: OECD (2023), * The most recent statistics for Turkey in the OECX database is from 2019.

Figure 1. Turkey's Public Social Expenditures in Comparison to the OECD Average.

The state was instrumental in the establishment of social security in Turkey. During this time, the state did not directly participate in the financing by paying premiums, but it did contribute indirectly by exempting it from taxes and fees. Throughout the Republican period, public social expenditures remained at a very low level (Buğra and Keyder, 2006). The 1961 Constitution explicitly defined the role of the state. During this time, the state was given the responsibility of directly providing social security to certain segments of society in accordance with ILO conventions. With its social security expenditures during this time period, the state was directly involved in social security. With the establishment of the social services and child protection institutions during this period, as well as the 65-year-old pension, social assistance and solidarity foundations, and newly formed aids for the disabled, the state's prominence in the social sector rose significantly. Despite this, Turkey's social spending remained lower than the OECD average. In 1990, Turkey's proportion of government social spending as a percentage of GDP was 3.8%, whereas the OECD average was 16.4%. Turkey ranked as the 3rd country with the lowest social expenditure percentage among OECD countries (OECD, 2023).

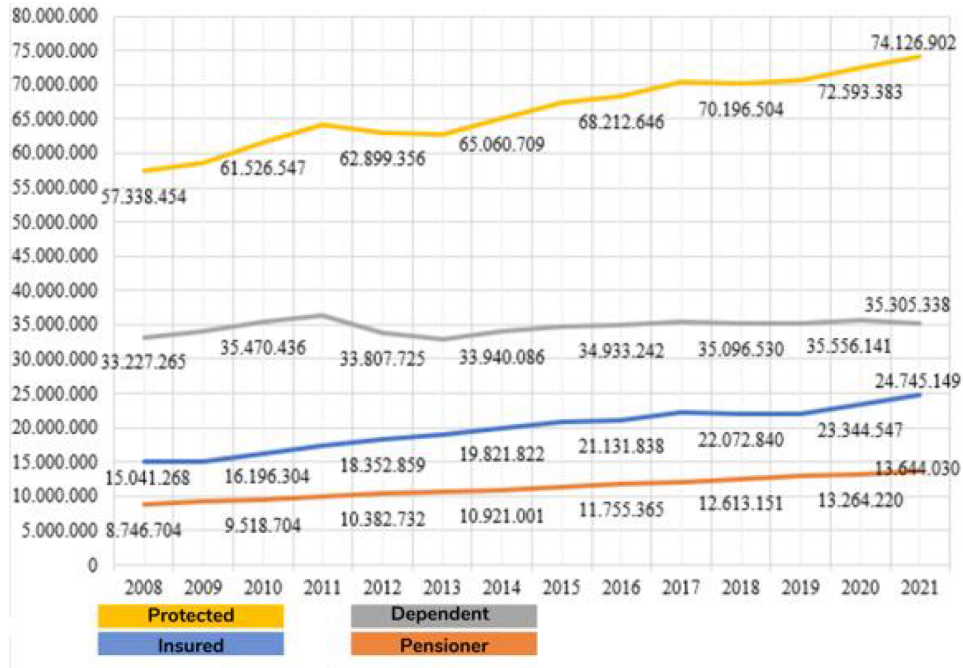
Turkey has experienced the consequences of neoliberal policies since the 1990s. During this period, the implementation of privatization, decentralization, and the downsizing of central administrations brought about substantial transformations in the state's involvement in social security (Özdemir, 2007). These changes aimed to diminish the state's role in public services and promote individualism, directly impacting the healthcare and pension systems. The underlying principle of this transition, as shaped by research conducted by the ILO and other international organizations, involves maintaining healthcare services at a minimum level to prevent essential healthcare and retirement benefits from falling into poverty. Retirement models that rely on compulsory individual contributions are expected to narrow the welfare gap (Yaşar, 2011:177). During this time, the share of the state's social expenditures in GDP fell slightly. In 1995, the percentage of GDP spent on social spending was 3.4% (OECD, 2023). But, Turkey's social protection expenditures have consistently climbed since 1995. According to the Turkish Statistical Institute's most recent social protection figures (see Figure 2), Turkey's social protection spending in 2021 increased by 19.9% over the previous year.



Source: TÜİK (2022)

Figure 2. Social Protection Expenditures of Turkey, 2012-2021.

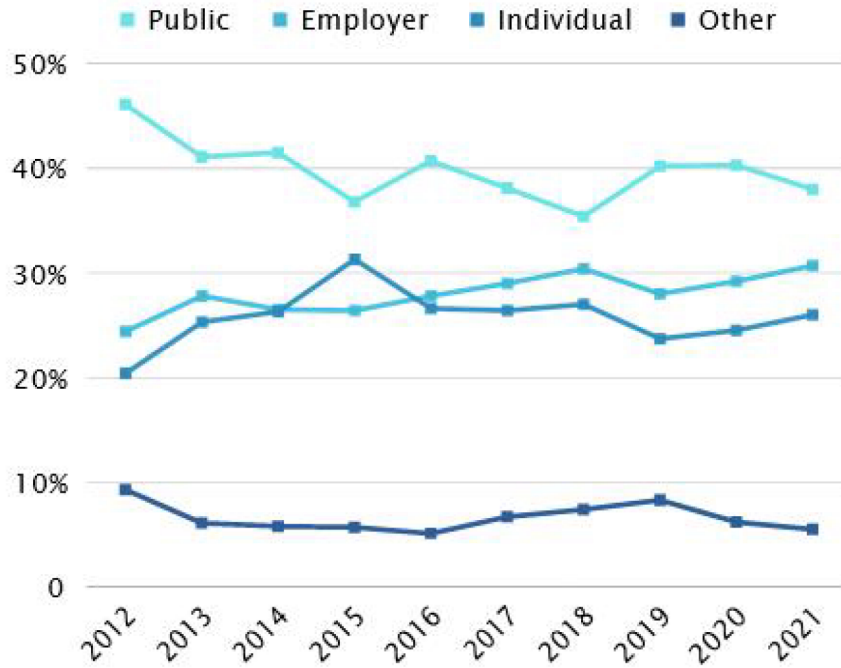
According to the data in Figure 3, the number of people receiving social protection has increased significantly since 2008. In Turkey nowadays, about 86% of the population is covered by social security. With the passage of the Social Assistance and Solidarity Encouragement Law in 2010, social protection measures for persons receiving social assistance, particularly vulnerable groups, have been strengthened. In this perspective, Turkey currently has several social protection programs such as unemployment insurance, general health insurance, disabled rights, family benefits, child protection, aged care services, home health services, social assistance, and support services.



Source: SGK, 2022a

Figure 3. Social Security Coverage in Turkey (2008-2021)

According to the most recent data, governmental payments accounted for 38.0% of social protection revenue, employer social contributions accounted for 30.6%, and individual contributions accounted for 25.9%. According to Figure 4, the state’s share of social protection expenditures in 2012 was 46.1%.



Source: It was produced by the authors using TÜİK data.

Figure 4. Distribution of Turkey's Social Protection Expenditures by Actors, 2012-2021.

Although social protection expenditures have increased rapidly over the last decade, the state's share of these expenditures has steadily decreased. On the other hand, the gradual increase in employer and individual social protection spending attracts notice. The increase in social protection benefits should not be regarded as a direct increase in the level of welfare. This requires an examination of the distribution of social protection spending based on risk groupings. The greatest expenditure in social protection benefits in 2021 was 353 billion 592 million TL, which was spent on retired/elderly people. Disease/health care spending was 242 billion 136 million TL after that. These expenditures were responsible for 4.9% and 3.3% of GDP, respectively. Aside from these two groups, spending on risk groups such as family/child, disabled, unemployment, and social exclusion has remained significantly lower.

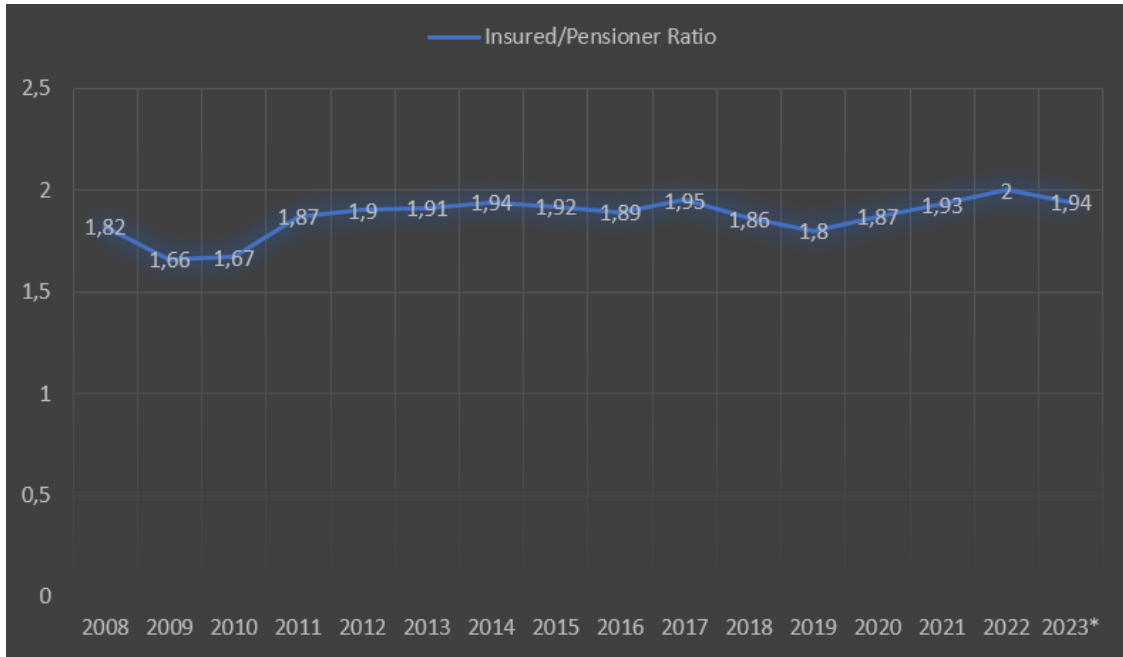
While pension and old-age expenditures account for the majority of social protection expenditures, the increase in transfers from the state budget reveals the magnitude of the social security system deficit. The social security reform, enacted with Law No. 5510 in 2008 and considered since the 1990s, failed to achieve financial sustainability, which was one of its key goals. The reform's goal was to make the social security system self-sufficient, and several reform criteria (retirement age, number of days of retirement premium, wage setting rate, and so on) were developed to that end. As a result, the reform increased the retirement age, the number of retirement premium days, and the working year, while decreasing the salary coverage ratio (Angın, 2019: 438). However, it is clear that social security reform has failed to balance the asset/liability equation in the last 15 years of.

According to the data presented in Table 2, the amount of funds allocated from the government to the social security organization has been consistently increasing from 2008 to 2021. In addition, the rise in inflation and exchange rates in 2022 exacerbated the financial deficit and heightened the borrowing needs of the Social Security Institution (SGK). Initially projected at 280.7 billion liras for 2022, the SGK allocation was raised to 420.5 billion liras through the supplementary budget. Nevertheless, these transfers did not result in a balanced decrease in the GDP ratio. This indicates that the existing deficits were not effectively addressed by the Turkish social security reform and could potentially expand further (TÜİK, 2023). This situation adds additional strain to the already fragile fiscal balance, emphasizing the urgent need for the implementation of a new social security reform.

Table 2. Budget Transfers to SGK (2008-2021)

Year	Budget Transfers (K TRY)	Rate of Change (%)	Ratio of GDP (%)
2008	35.016.403	5,9	3,49
2009	52.599.691	50,2	5,23
2010	55.244.258	5,0	4,73
2011	52.772.218	-4,5	3,76
2012	58.728.293	11,3	3,71
2013	71.263.763	21,3	3,91
2014	77.335.890	8,5	3,76
2015	79.038.817	2,2	3,36
2016	108.073.487	36,7	4,11
2017	128.182.906	18,6	4,09
2018	150.530.375	17,4	4,00
2019	196.797.506	30,7	4,56
2020	248.846.194	26,4	4,93
2021	252.083.979	1,3	3,50

Kaynak: SGK (2022b).



Kaynak: SGK (2022a), SGK, (2023).

Figure 5. Insured/Pensioner Ratio in Turkey (2008-2022).

The low level of employee/retired balance, in general, is causing the degradation of the Social Security Institution's (SGK) income-expenditure balance and the growth in its weight on the state. This is due to the low active/passive insured ratio. This ratio is derived by dividing the number of insured people who contribute to the social security system by the number of people who get benefits from the system on a monthly basis. To be financially viable, the SSI should be at least 4, similar to the European Union average. Turkey has 13 million 199 thousand 469 pensioners compared to 25 million 793 thousand 200 active insured people as of March 2023 (SGK, 2023). This demonstrates that the active/passive insured ratio is 1.94. Although this ratio, which stood at 1.65 in 2009, has risen slightly in recent years, it remains far below the desired level. In other words, the fact that social security income and expenses could not be met despite an increase in the scope of social security and an increase in the number of active insured demonstrates that there has been no significant improvement in efficiency and productivity in the system in parallel with the expansion of the scope of social security; this indicates that the system's financial sustainability is difficult. One of the primary reasons for the appearance of this picture is that informal employment accounts for around 28% of total employment (Bulut, 2019a: 89).

Another factor to consider in terms of the state's role in social security is the institutional structure of the social security system. In this regard, it is vital to concentrate on the roles of state and non-state actors, as well as the historical shifts in these positions. By comparing Turkey to Southern European nations, comparative social policy studies classify the Turkish welfare state as a corporatist social security system (Özdemir, 2007:406). In the lack of institutional social security systems, family and personal networks are critical to survival. The state indirectly fosters the preservation of family ties and their centrality in people's lives (Dedeoglu, 2013: 3). However, demographic trends in Turkey indicate that the traditional family care function is under strain. Because nuclear families are becoming the norm in cities, the population is aging and fertility rates are declining. In cities, where extended families are becoming increasingly rare, it becomes unrealistic to expect family support to continue to supplant formal safety nets (Buğra and Keyder, 2006:221). This circumstance highlights the need for the government to contribute more financially, particularly in areas such as elderly and child care.

Although the state has had a limited role in financing these services in Turkey since the beginning of time, it has always had sole responsibility for its administration. Since the establishment of the first social security institutions, there has been a tutelary management approach. Furthermore, various reform studies have been conducted to ensure that non-state actors have a voice in administration in accordance with European Union harmonization negotiations and ILO conventions. For example, in the Social Security Specialization Report prepared by the State Planning Organization as part of the Ninth Development Plan, it is stated that the lack of coordination between institutions and the inability to establish a common database result in repetitive payments in aid, and that coordination should be ensured between public institutions, local governments, the private sector, and non-governmental organizations. (DPT, 2006:53).

However, discussions about reforming Turkey's social security system have so far been devoid of meaningful negotiations and compromises (Buğra and Keyder, 2006). In actuality, the state invites civil society and the private sector to participate in its institutional frameworks, where it controls the decision-making and management mechanisms (Yavuz and Es, 2021). For example, under Law No. 5510, there are regulations for the participation of social parties in the decision-making process in such a way that the state's management authority in managing the institutional structure of the social security system is limited (Alper, 2019: 389). A situation comparable to this prevails in the administration of Social Assistance and Solidarity Foundations. While governors in provinces and district governors preside over these foundations, representatives from non-governmental organizations are permitted to serve on foundation boards of trustees. However, due to centralized approaches, the participation of non-state actors in the administration remains symbolic. The only explanation for this scenario is not simply the government's unwillingness to compromise. By refusing to confront the system's shortcomings, social actors in various positions in the social security system contribute to the existing lack of conversation (Buğra and Keyder, 2006).

The Effect of Covid-19 and Victims of Delayed Pension Age (EYT) Regulation on the Role of the State in Social Security

Two big events affecting social security occurred throughout the last 15 years of Turkey's social security reform. The first is the Covid-19 epidemic, which has had an impact on the entire globe. During the epidemic, many people lost their jobs, and working conditions and job security deteriorated. As a result, the demand for the social security system has grown. The second event is the government's regulation of "Victims of Delayed Pension Age" called as EYT in 2023.

The Covid-19 pandemic has highlighted income disparities around the world and dramatically raised the number of people in need of a social protection network. Although the International Labor Organization (ILO) report titled "World Social Protection Report 2020-22: Social Protection at the Crossroads" notes that developments in the field of social protection worldwide have gained momentum, it is stated that more than 4 billion people, equivalent to 53% of the world's population, are still not covered by social protection. Furthermore, the report emphasized that Covid-19 widened income disparities between countries and that needs in the context of social protection could not be adequately met. Among the initiatives to be taken for a sustainable future, the report underlines the importance of developing rights-based social protection institutions. In this regard, it is claimed that international solidarity for poor nations should be formed in light of the positive consequences of education, health, and the observance of fundamental rights (ILO, 2021).

As fears of recession and financial collapse have emerged, it is frequently emphasized that states should intervene more in health care and working life issues following Covid-19, provide more generous social assistance to those in need, and demonstrate stronger leadership (Nicola et al; 2020:190). Prevention of the pandemic, financing of health services, and income support for individuals economically impacted by the virus have been among the states' key priorities. However, there has been a general decrease in the provision of social services during the pandemic period (Daly, 2020). This has the potential to exacerbate gender, racial, and socioeconomic inequality (Yavuz and Es, 2021).

During the Covid-19 era, many governments attempted to expand social insurance, increase existing social assistance programs, and support employment, among other things. However, informal workers, casual workers, immigrants, and other disadvantaged groups, who are the most vulnerable to the epidemic, are not covered by these social policies. As a result, a central government strategy predicated on growing social security for registered workers is likely to leave these populations' critical requirements unmet (Gerard et al., 2020). This circumstance has highlighted the importance of the period of social protection, which developed firmly with the 2008 global financial crisis. The COVID-19 pandemic has clearly highlighted the importance of developing rights-based social protection systems that are not based on premium payment and cover every individual living in complete, as stated in the aforementioned ILO study.

Following the Covid-19 pandemic, countries attempted to mitigate the effects of the health crisis through social and economic regulations. Turkey additionally provided further help and direct monetary aid in this area through the "Social Protection Shield" program. Furthermore, the Ministry of Family and Social Policies implemented the "Epidemic Social Support Program" in three stages. Social expenditures increased by 17% in 2021, reaching 81.2 billion TL (Şeren and Geyik, 2021).

The issue of retirement age, also known as EYT, has been a topic of discussion in recent years. The root of the problem can be traced back to the enactment of laws 4447 and 5434 in 1999, which introduced a gradual increase in retirement age. Although the retirement conditions, such as length of service and number of premium payment days, are deemed satisfactory, there remains a group of individuals who must wait to retire. The purpose of this age regulation was to maintain a balanced income-expenditure equilibrium within the social security system. However, due to an increase in the number of passive insured individuals and expenses, the SSK budget has been operating at a deficit since 1992, which has only worsened in the years since. In 1999, the transfer ratio of SSK, Bağ-Kur, and Emekli Sandığı to GDP was 3.5% due to their respective deficits. In order to rectify this negative financial situation, Law No. 4447 raised the retirement age by 3-17 years (Bulut, 2019b:174).

For a long time, the Turkish government has been hesitant to create regulations on this subject. The main concern was that the

actuarial equilibrium of the social security system would be disrupted, imposing an additional economic burden to the system. Furthermore, the government expressed concern about the EYT regulation's potential impact on other retirement rights. However, in response to mounting public pressure and looming elections, the government relented and issued a legal regulation in the first quarter of 2023 granting some employees the right to retire early.

EYT concerns more than 6 million employees, which accounts for roughly a quarter of the current workforce. Initially, when the law was implemented, approximately 1.5 million individuals were eligible for immediate retirement, while the remaining individuals will retire gradually over the next few years. These statistics worsen the already unfavorable ratio between active and retired individuals who receive insurance benefits. When the present pension of more than 13 and a half million EYT members are included, the total number of retirees will exceed 20 million. In this scenario, the actuarial balance is expected to decline to 1.2 (Güllü, 2022). The data for April, when EYT members received their first pension, was not released by SGK yet. However, authorities have reported that approximately 1 million people retired due to the new regulation. This figure suggests that the asset/liability ratio, which was 1.94 in March, dropped by 0.20 points to 1.74 in April. Consequently, transfers from the general budget are projected to increase further in order to bridge the social security gap.

Conclusion

Essentially, social security reforms strive to solve welfare state challenges and make social security systems more sustainable. Although the state retains responsibility, additional programs such as pension funds based on individual initiatives and health services are used to better manage resources. Welfare state policies, including social security reforms, seek to create a system in which all segments of society can live in dignity. This system should be controlled in accordance with demographic and economic-social developments.

While the effects of factors such as population aging, family dissolution, and a high unemployment rate increase, the goal of securing the masses who do not have access to welfare services causes a continuous increase in social expenditures. Social security changes that incorporate individual initiative and the private sector to address social security demands, increasing the weight of non-state actors in the system, including rethinking the role of the state in social security. It is plausible to argue that the state's role in social security has dwindled as a result of reform measures.

Many countries around the world, particularly in Europe, have implemented comprehensive social security reforms. These improvements include the government providing a bare minimum of security and the private sector providing additional security. However, as a result of the 2008 global financial crisis, unemployment increased globally and the social security deficit widened. This new situation has elevated the state to the core of social security and expanded its role in every way. The basic social protection guarantee has been fully loaded on the state, its function in social insurance has been kept, and its regulatory-supervisory role in complementing institutions has been strengthened.

Reform studies in Turkey, which had been ongoing for some time, were completed with the passage of Law No. 5510 in 2008. Reform initiatives cannot be said to have been successful in all three major areas. To begin with, there is no doubt that the service provided by utilizing technology advancements is more effective and efficient for the beneficiaries. Since the Law's enactment in 2008, the number of people covered by social protection has increased significantly. The failing point is assuring the financial viability of the social security system. Since 1992, Turkey's actuarial balance has deteriorated, and social insurance has begun to run a deficit. Although it was aimed to eliminate this anomaly between income and expenditure with the 2008 reform, it does not seem possible to say that the desired results have been achieved yet.

The revised Turkish social security system has been put to the test in two big events over the last 15 years, one global and one local. The Covid-19 outbreak, which appeared in the final days of 2019, has dramatically increased the number of people in Turkey and around the world who require social support. The pandemic is most harmful to the poor, refugees, the disabled, and others who have the least access to social security in society. affected the disadvantaged groups and prompted the state to intervene more effectively against the challenges of these groups. This circumstance is also consistent with the ILO's approach to social protection bases. As a result, the government is anticipated to take a larger role in providing social protection to all elements of society than in the past. The EYT regulation is a local occurrence that has an impact on the state's social security responsibility. With EYT, about 25% of existing employees are eligible for early retirement. Aside from the rights and justice implications of the event, it is almost certain that the social security system will significantly shift the active-passive balance. The employee/retired ratio is predicted to fall to 1.2 figures with the retirement of all EYT members. This means that the government will have to transfer additional funds to cover the social security gap.

Although the practice of closing the difference between social security revenues and expenditures with budget transfers is correct under the social state principle, it is not financially sustainable; therefore, studies based on efficiency and productivity criteria in the control of social security expenditures, as well as more effective methods and methods for collecting and evaluating social security revenues, are required. It is certain that financial instruments would be acceptable. Again, it is clear that the implemented

social security policies do not reduce poverty and inequality sufficiently, and the proportion of the population covered by social security does not spread to the entire society. As a result, it is believed that the reform process should not be halted and that more thorough reforms should be pursued. Although the activities of municipalities and non-governmental organizations provide resource diversity in social security, it is believed that the welfare state still requires restructuring. For a long-term social security system, the government must approach crises with fresh eyes and satisfy new demands. Emerging difficulties should not be postponed, but should be evaluated as soon as possible using various techniques.

Today, the role of social security in preventing poverty and income inequality is at the forefront. Although social security is primarily based on social insurance, social assistance and social services will comprise the majority of future social policy areas. Long-term social assistance practices that prevent an individual from standing on his own two feet, make him dependent on state assistance, and prevent him from working in an insured job should be prohibited because they feed unregistered employment and jeopardize the social security system's sustainability. Furthermore, as the elderly population grows, so will the proportion of total pensioners and income recipients.

As a result, the measures to be made should attempt to increase the number of active insured. Reducing the monthly bonding rate and expanding the retirement age will boost the senior population's labor force participation rate and employment level. Again, the state should develop policies that encourage employment and include inclusive groups in order to increase the labor force participation rate of the young population and the level of employment. Furthermore, this entire process cannot be carried out solely with state resources and means. As a result, a governance system should be constructed through which all social stakeholders, particularly local governments, can contribute to and participate more in social security research.

There is one limitation to this study. The focus of this study was on examining the changes in the role of the state in the 15th year of social security reform in Turkey. However, since the recent implementation of the EYT regulation, which directly affects the state's role in social security, not all the effects of this regulation have been captured in official statistics. A longer period of time is needed to fully evaluate the impact of the EYT regulation on the social security system. Additionally, uncertainties remain regarding the execution of the regulation, the formulation of policy changes, and their societal implications. Nevertheless, these limitations do not diminish the significance of the study's findings. Future research can delve more comprehensively into the consequences of this regulation and thoroughly analyze how the EYT regulation influences the role of the state in the social security system.

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ORCID IDs of the authors / Yazarların ORCID ID'leri

Abdulhalim Çelik 0000-0002-4905-6481
Kübra Yavuz 0000-0003-1437-2959

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