

Research Article

Analysis of Social Protection Expenditures for Disabled Individuals: The Case of Türkiye

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Abstract: There have been notable shifts in the rights and social protection expenditures for persons with disabilities at the national and international levels. The objective of this study is to examine the evolution of social expenditure for individuals with disabilities in Türkiye. The study employed a descriptive research method. The objective of the study is to ascertain the methodology utilized in the analysis of social protection expenditures for disabled individuals in Türkiye between the years 2001 and 2021. The study revealed a notable rise in the employment of disabled individuals in the public sector in Türkiye. While the provision of conditional social protection assistance for disabled people increased, the level of unconditional social protection expenditure decreased. While the value of cash assistance declined, the value of in-kind assistance increased. In the context of social protection expenditures for disabled people in Türkiye, a notable shift has been observed, moving away from an unconditional and cash-centric approach towards a conditional and in-kind aid-focused approach. In Türkiye, the proportion of those receiving a disability pension has decreased, while social support for disabled people has increased. In conclusion, when social protection expenditures for the disabled in developed countries are taken into account, it becomes evident that there is a need for improvement in the social protection expenditures for the disabled in Türkiye.

Keywords: Disability Expenditures, Social Protection Expenditures, Disadvantaged Groups, Public Policy **Jel Codes:** J14, I11, J18, I18

Engelli Bireylere Yönelik Sosyal Koruma Harcamalarının Analizi: Türkiye Örneği

Öz: Engelli bireylere yönelik haklar ve sosyal koruma harcamaları konusunda ulusal ve uluslararası düzeyde önemli değişimler yaşanmaktadır. Çalışmanın amacı, Türkiye'de engelli bireylere yönelik sosyal harcamalar konusundaki gelişmeleri analiz etmektir. Çalışmada betimleyici araştırma yöntemi tercih edilmiştir. Çalışmanın yöntemsel amacı, Türkiye'de 2001-2021 yılları arasında engelli bireylere yönelik sosyal koruma harcamaları konusundaki yaklaşımın belirlenmesidir. Araştırma sonucunda Türkiye'de engelli bireylerin kamu sektöründeki istihdamında anlamlı artış sağlandığı görülmüştür. Engelli bireylere yönelik şartlı sosyal koruma yardımları artarken, şartsız sosyal koruma harcamalarının azalmıştır. Nakdi yardım oranları azalırken, ayni yardım oranlarının arttığı belirlenmiştir. Türkiye'de engelli bireylere yönelik sosyal koruma harcamalarında şartsız ve nakdi yardım merkezli yaklaşımdan, şartlı ve ayni yardım merkezli yaklaşıma doğru değişim gözlenmiştir. Türkiye'deki sosyal koruma harcamalarında engelli maaşı alanların oranı görece azalırken, engelli bireylere yönelik sosyal destekler artış eğilimindedir. Sonuç olarak gelişmiş ülkelerin engelli bireylere yönelik sosyal koruma harcamaları dikkate alındığında; Türkiye'de engelli bireylere yönelik sosyal koruma harcamalarındaki ilerlemelerin gelişmeye açık olduğu görülmektedir.

Anahtar Kelimeler: Engelli Harcamaları, Sosyal Koruma Harcamaları, Dezavantajlı Gruplar, Kamu Politikası Jel Kodları: J14, I11, J18, I18

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1. Introduction

Individuals with disabilities are those with varying levels of physical, mental, emotional, or sensory impairments that restrict their participation in social processes under equal conditions with other individuals, limiting their ability to perform certain activities and interact with their external environment. In other words, individuals who experience limitations in their personal activities and social life due to structural or functional restrictions in their body or mental functioning are considered individuals with disabilities. The traditional approach to services for individuals with disabilities was primarily limited to care and rehabilitation services aimed at addressing physical, mental, emotional, and sensory impairments. However, today, the approach to individuals with disabilities has broadened to encompass human rights and equal citizenship. In the evaluation of social protection expenditures for individuals with disabilities, developments in social rights for individuals with disabilities have been examined first at the international level and then within the context of Türkiye. To evaluate the socioeconomic impact of social protection policies for individuals with disabilities, a comprehensive analysis has been conducted of the general trends and approaches to social protection expenditure. The research project involved the establishment of criteria for the description of social protection expenditures and a comprehensive literature review on the subject. In accordance with the established criteria, social protection expenditures for individuals with disabilities were quantified through the utilization of ratios. It is anticipated that the study will make a significant contribution to the existing literature on the current trends in social protection expenditures for individuals with disabilities.

2. Conceptual Framework for Social Protection Expenditures

Social protection expenditures for individuals with disabilities are shaped by social, economic, demographic, cultural, and legal changes specific to each period. The traditional approach to social protection expenditures is primarily limited to care services and rehabilitation costs. However, without providing educational and employment conditions that support an individual's participation in social life, an approach that is solely focused on treatment and rehabilitation is insufficient for achieving a state of complete physical, social, and mental well-being for the individual. In the prominent production models within traditional production relations, individuals with disabilities are excluded from production and employment. The social exclusion of individuals with disabilities leads to greater economic dependency and ultimately results in impoverishment. This situation, in a way, signifies a departure from the definition of health that emphasizes complete well-being. While individuals with disabilities are excluded from production processes during periods of smooth functioning of capitalism, it is observed that during periods of crisis such as war, famine and economic depression, disadvantaged groups such as women and children, especially the disabled, can be included in the production system. It is observed that during the First and Second World War periods, these groups were mostly employed in the production and logistics of war weapons, tools and equipment, while in the post-war and post-crisis periods, they were excluded from employment for various reasons (Alcock, May, and Rowlingson, 2011, p.523). When examining the historical development of social policies for individuals with disabilities, it is observed that in the late 19th century, there was a narrow-focused social policy approach centered on the special and basic educational needs of individuals with disabilities. This approach evolved into a broader social policy perspective concerning the medical and vocational rehabilitation of individuals with disabilities after World War I and later addressed employment and protection in the workplace following World War II (Altan, 2006, p.253).

Today, with the development of social rights for individuals with disabilities, employment and social inclusion policies for this group are becoming increasingly

diverse. Disability is viewed as an issue of human rights, citizenship, and equality in parallel with the development of social rights (Alcock et al, 2011, p.521). In this context, a broad social policy approach is emerging today, focusing on the sustainability of rights for individuals with disabilities in every aspect of life, such as education, health, housing, employment, politics, culture, art, and sports, to ensure their full and effective participation in social life under equal conditions. In developed countries, individuals with disabilities are positioned in social life as those who have a voice in policy processes, advocate for equal participation regarding physical and social barriers, adopt rights-based policies instead of a 'charity culture,' take greater initiative in their daily lives, and play a role in organized civil society organizations (CSOs). It is believed that the development of NGOs focused on individuals with disabilities also encourages nation-states to develop more planned, effective, and rights-based distribution and sharing policies regarding social protection expenditures for individuals with disabilities (Alcock et al, 2011, p.525). However, these developments are not at the same level in all countries, and in countries where inequalities are high and income distribution is distorted, it is not possible to observe similar progress in the development of social rights and social protection expenditures for individuals with disabilities. When examining social protection expenditures for individuals with disabilities in developed countries, the primary policy aims to support the employment of more individuals with disabilities, enabling a greater number of them to participate in the workforce rather than relying on assistance systems. When disability levels are assessed with more comprehensive approaches, it is observed that support assistance increases for those with higher disability rates, while the number of individuals receiving disability pensions decreases (Alcock et al, 2011, p.529).

It has been observed that increasing inequalities in social and economic spheres due to globalization make disadvantaged groups, particularly individuals with disabilities, more vulnerable (WB, 2023). In response to the risk of vulnerability, it is observed that international organizations such as the United Nations, the World Bank (WB), the European Union, and the Organization for Economic Co-operation and Development (OECD) have undertaken significant efforts in developing and monitoring policies related to the rights of individuals with disabilities. Effective social protection systems are believed to depend primarily on the leadership of the social state, supported by the development and implementation of national legislation that aligns with international standards and commitments. The findings of the World Bank report indicate that social protection and labor capacities are limited in significant parts of Africa, the Middle East, and Asia, particularly in Sub-Saharan Africa. Currently, 76% of the Sub-Saharan African population struggles to survive without benefiting from social protection transfers. The inequalities in social protection and labor capacity among regions also highlight the necessity for greater support for initiatives aimed at developing social protection expenditures on a global scale.

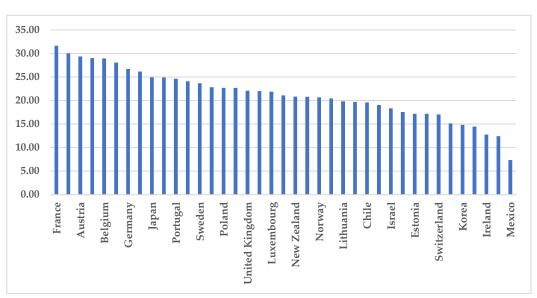
Individuals with disabilities are among the disadvantaged groups most affected by inequalities in social protection and employment. It is observed that transnational governance in social policies for individuals with disabilities has further developed through institutions such as the United Nations (UN) and the European Union (EU) (Alcock et al, 2011, p.527). Article 28 of the UN Convention on the Rights of Persons with Disabilities provides for detailed provisions regarding the adequate standard of living and social protection for individuals with disabilities. States Parties recognize the right of individuals with disabilities to enjoy an adequate standard of living and social protection without discrimination based on their disability (UN, 2006). Türkiye signed the convention on March 30, 2007. Under the heading of adequate standard of living and social protection, this convention includes subtopics such as access to clean water, social protection and poverty reduction programs, access to equipment and other assistance related to the needs of individuals with disabilities, access to state assistance for expenditures related to disability, including appropriate education, counseling, financial

aid, and respite care for individuals with disabilities and their families, access to housing programs, and access to retirement opportunities and programs.

The EU and all Member States are parties to the United Nations Convention on the Rights of Persons with Disabilities (UN, 2006). It is observed that the convention has guided the 2010-2020 European Disability Strategy (EU, 2010) and the EU 2021-2030 Disability Rights Strategy (EU, 2021). Article 15 of the Revised European Social Charter (RESC) stipulates that States Parties shall promote the right of persons with disabilities to live independently, to be socially integrated, and to participate in the community. (European Social Charter, 1996). It is stated in the European Pillar of Social Rights, which is the EU's most fundamental strategic document on social policy and employment, that individuals with disabilities have the right to access income support that enables them to live with dignity, services that support their participation in society and the workforce, and a work environment that meets their needs (EU, 2017).

Approximately 87 million people in the EU have some form of disability. Despite all the regulations made, 52% of individuals with disabilities believe they have experienced discrimination. People with disabilities report being four times more likely than those without disabilities to be unable to meet their health needs. 20.3% of young people with disabilities must drop out of education due to their disability, while this rate is 9.8% among those without disabilities. 29.4% of individuals with disabilities complete higher education programs, compared to 43.8% of those without disabilities. The employment rate for individuals with disabilities is 50.8%, while the rate for those without disabilities is 75%. Among people with disabilities, 37.6% are not active in the labor market, compared to 17.6% among those without disabilities. Additionally, 28.4% of individuals with disabilities are at risk of poverty, while the poverty risk among those without disabilities remains at 18.4% (EU, 2021). According to the Türkiye Statistical Institute (TurkStat), the employment rate in Türkiye was recorded at 49.6% and the unemployment rate at 8.6% as of the end of 2024 (TÜİK, 2024). While the employment rate among persons with disabilities was recorded at 15.1% as of 2022, the unemployment rate was recorded at 84.9% (TÜİK, 2023). These figures highlight the necessity to increase employment opportunities for persons with disabilities in Türkiye. EU data indicates that despite equal and equitable economic and social policies aimed at eliminating poverty and discrimination risks for individuals with disabilities, there is a need for regulations that support sustainability. According to 2020 data across the EU, 31.4% of the gross domestic product (GDP) is allocated for all social protection expenditures, while Türkiye allocates 12.8% (Eurostat, 2020). While 2.2% of the GDP is allocated for individuals with disabilities across the EU, the allocation in Türkiye is at the level of 0.4% (Eurostat, 2020). The data indicate that, there is a need to develop sustainable and inclusive new social policies in Türkiye to reach the level of social protection expenditures for individuals with disabilities across the EU.

Social expenditure is among the primary indicators monitored under the 'Society' heading within the OECD organization. The social expenditures in the OECD database include cash transfers, direct provision of goods and services, and tax deductions for social purposes. Social assistance targets disadvantaged groups such as low-income households, the elderly, individuals with disabilities, the sick, the unemployed, and the youth. Social assistance is classified as public when the central government controls the relevant financial flows. All other forms of social assistance not provided by central and local governments are considered private assistance. In calculations, private transfers between households are not evaluated as 'social.' The net total social expenditure includes both public and private expenditures. OECD social expenditure data (OECD, 2023) differ in that they also include the impact of the tax system through direct and indirect taxation as well as tax reductions aimed at social purposes in their calculations. In the literature, it is often observed that the OECD social expenditure indicator is used for comparisons between member countries and regions based on its share of gross domestic product



(GDP). The share of social expenditures in GDP for OECD member countries is illustrated in Figure 1.

Figure 1. The Proportion of Social Expenditures to GDP in OECD Member Countries for the Year 2022 (OECD, 2023)

France stands out by allocating more than 30% of its GDP to social expenditures among OECD countries. Following France are Italy, Austria, Finland, Belgium, Spain, Germany, and Denmark, which allocate 25% or more. Ireland, Türkiye, and Mexico occupy the last three positions in the ranking. The average social expenditure rate for the OECD is 21% (OECD, 2023). Although Türkiye ranks low in the OECD report, it is positively highlighted that more than three times the resources have been allocated to social expenditures compared to the 1990s (OECD, 2019). More than 66% of social protection expenditures are allocated to health and pension expenses. It is understood that Türkiye needs to demonstrate more effective policies, models, and approaches compared to the social expenditures of OECD member countries in the next section of the research, the policy changes experienced in Türkiye will be examined considering the international developments regarding social protection expenditures for individuals with disabilities discussed above.

3. Social Protection Policies for Disabled Individuals in Türkiye

Each country develops models for social protection expenditures for disabled individuals that are appropriate to its own socio-economic conditions and compatible with international social assistance approaches. It is necessary to address the effective approaches in Türkiye's social protection expenditures for disabled individuals and the changes associated with these approaches.

A review of the historical development of social policies for persons with disabilities in Türkiye reveals that Act No. 5822 dated 1951 is regarded as one of the earliest legal regulations for persons with disabilities. The legislation pertains to the transfer of the Deaf-Dumb and Blind (DDB) School in Izmir, which was previously under the jurisdiction of the Ministry of Health and Social Welfare, to the oversight of the Ministry of National Education (DDB, 1951; MoNE, 2020, p.29; Çitil and Üçüncü, 2018, p.253). This legal development is significant in illustrating the shift from a 'health service' approach to a 'social service' approach towards individuals with special needs. As Altan (2006) observes, social policies for the protection of individuals with disabilities are embodied in the 1961 Constitution and the regulations in the Maritime Labour Act (No. 854) of 1967 (MLA, 1967) and the Labour Act (LA, 1967). The 1961 Constitution of the Republic of Türkiye

also guarantees social policies for disabled people in need of special education, as outlined in Article 50, which states: The State shall take measures to make those who need special education due to their condition useful to society (Constitution, 1961). Since the 1980s, policies for the disabled have been subject to numerous legal and institutional regulations, in line with the provisions outlined in the 1982 Constitution (Constitution, 1982).

In Türkiye, the primary legal foundations for services to disabled individuals are articulated in the 1982 Constitution and the Act No. 5378 on Persons with Disabilities, which entered into force in 2005 (PD, 2005). The 1982 Constitution expressly incorporates social policies for disabled individuals, stipulating in Article 61 that 'The State shall undertake measures to ensure the protection of the disabled and their adaptation to social life.' Article 65 delineates the limits of the economic and social duties of the State, stipulating that the State is obligated to fulfil its constitutionally defined duties in the social and economic spheres within the constraints of its financial resources, while prioritizing the objectives of these duties (Constitution, 1982). This article is of particular significance in demonstrating that social protection expenditures for persons with disabilities, which are considered among the social duties of the state, can be delineated within the framework of 'priority in accordance with the objectives' and 'adequacy of financial resources'.

Following the enactment of Act No. 5378 on Persons with Disabilities in Türkiye, a significant number of laws, regulations and directives have begun to incorporate provisions for disabled individuals (ÖİB, 2010). The evolution of social policies towards disabled individuals in Türkiye constitutes a vast research domain that necessitates analysis from historical, legal, economic, political and sociological perspectives. The present study is constrained to the analysis of alterations and advancements in social protection expenditures for disabled individuals.

As of July 2023, the number of individuals registered and alive in the National Disabled Data System of Türkiye is 2,511,950, with 1,414,643 males and 1,097,307 females. The number of individuals with severe disabilities is 775,012. (ASHB, 2023, p.16). Individuals who are affected by attitudes and environmental conditions that restrict their full and effective participation in society on an equal basis due to various levels of impairment in their physical, mental, psychological, and sensory abilities are defined as disabled individuals in national legislation. (LPD, 2005). It is observed that social assistance policies are included in development plans and programs, which serve as public policy documents, as well as in special expert commission (SEC) reports in Türkiye. One of these is the SEC report prepared within the scope of the 8th Five-Year Development Plan. (DPT, 2001). The report recommends that the sections related to social assistance implementation in the laws be reorganized, and legislation be prepared in the form of a Social Assistance Basic Law to rationally plan social assistance programs at the national level. In Türkiye, ongoing efforts to standardize and improve support and care services for disabled individuals are being led by the Ministry of Family and Social Services. (LPD, 2005).

At the forefront of social protection initiatives are the employment challenges faced by individuals with disabilities. Article 27 of the United Nations Convention on the Rights of Persons with Disabilities provides a detailed framework, addressing all the issues related to the right to work for people with disabilities (UN, 2006). States that are parties to the Convention recognize that people with disabilities have the right to work on an equal basis with others. According to the Labor Law, employers who have 50 or more employees are required to employ at least 3% of their workforce as persons with disabilities in the private sector, 4% in the public sector, and 2% as former convicts in Türkiye (LA, 2003). The processes related to the employment of disabled workers are carried out by the General Directorate of Turkish Employment Agency. Public institutions and organizations are obligated to employ people with disabilities at a rate of 3% of their total staff. When calculating this rate, the total number of positions filled in the relevant public institution or organization is considered. In 2011, a change in the Public Servants

Law enabled individuals with disabilities to become civil servants through centralized exams and lotteries. Disabled candidates who have graduated from secondary education (high school), associate degree, or bachelor's degree can apply for the centralized exam system, while those who have completed primary school, elementary education, or middle school can apply for the lottery system. (ASHB, 2023, p.32). With the regulation made for mothers who have a child with a severe disability, one-fourth of their premium payment days are added to their total premium payment days, and the added duration is deducted from the retirement age limit. (SS, 2006). It can be considered that the regulation facilitates the health and social security of mothers with children who have severe disabilities.

The procedures for disabled individuals to receive monthly payments are carried out within the framework of the principles outlined in Act No. 2022, which regulates the granting of monthly allowances to Turkish citizens who are 65 years old or older, in need, weak, and without family support (GP, 1976). As of the end of 2022, the number of individuals receiving disability pensions with a disability rate of 70% or higher reached 279,816. The number of individuals receiving disability pensions with a disability rate between 40% and 69% is 348,289. Additionally, the number of individuals receiving caregiver allowances for disabled persons at the end of 2022 is 100,812. In terms of the segments receiving disability pensions, the highest increase is observed in the number of individuals receiving caregiver allowances for disabled persons. (ASHB, 2023, p.44).

The applications for providing home care services to individuals with disabilities are regulated by Article 7 of Act No. 2828 on Social Services. Disabled individuals in need of care can benefit from home care support through official or private care centers or social assistance, provided that their total household income, based on all sources, is less than two-thirds of the monthly net minimum wage per capita. The coefficients to be used for the payment of social assistance are explained in the second paragraph of Article 7 of the same legislation. The legal regulation of monthly social assistance provided for the care of individuals with disabilities, whether at home or in private care centers, represents a significant development for the sustainable care services of disabled individuals. The coefficients to be used for the payment of social assistance are explained in the second paragraph of Article 7 of the same legislation. The legal regulation of monthly social assistance provided for the care of individuals with disabilities, whether at home or in private care centers, represents a significant development for the sustainable care services of disabled individuals. This ensures that consistent and adequate support is available for those in need of care. The considerable increase in the number of individuals utilizing home care assistance, from 28,583 in 2007 to 566,688 by August 2023, serves to illustrate the high level of societal acceptance and benefit derived from such services (ASHB, 2023, p.45).

In Türkiye, care services for individuals with disabilities who require assistance can be provided by public official care and rehabilitation centers, depending on the request of the disabled individual or their legal representative, as well as the capacity of the institutions. As of April 2023, the number of individuals with disabilities receiving services from official care and rehabilitation centers is 7,090. Considering that the number of individuals with disabilities in Türkiye exceeds two million, it is evident that there is a need to increase both the capacity and quality of care and rehabilitation centers. The report states that with the introduction of home care fees, regulations for opening private care centers, and the increase in the number of public official residential care centers, there are currently no individuals with disabilities waiting to receive services from residential care institutions (ASHB, 2023, p.53). In any case, considering the total number of individuals with disabilities, it is evident that there is potential for further development in both the capacity and quality of public and private care centers.

When an individual with a disability in need of care or their legal representative requests care services, and the private care center accepts the individual, care services can be provided from the specialized care centers as stipulated by the legislation. For individuals in need of care receiving 24-hour care services at private care centers, the government makes monthly payments equivalent to two months' worth of the net minimum wage. For individuals with disabilities in need of care who receive 24-hour care services from their relatives, a monthly payment equivalent to the amount of the net minimum wage is provided. (BMEHY, 2007). As of April 2023, the number of individuals with disabilities receiving care services from private care centers is 27,773. The allocated budget for the care of individuals with disabilities in these private centers amounts to 2.688 billion TL. (ASHB, 2023, p.56). Based on the average exchange rate for 2022 in Türkiye, it is understood that over 160 million USD was spent on private care services for individuals with disabilities in that year. It appears that the payments for care services encourage disabled individuals to receive care not only in public care centers but also in private care centers located near their residences, and whenever possible, to receive care at home while being with their families.

In Türkiye, it has been observed that a significant number of public policies aimed at individuals with disabilities have recently been implemented and are currently in effect. An important research topic is how much individuals with disabilities benefit from social protection expenditures. The level of social protection expenditure also reflects the country's socio-economic development level. In the next section of the study, the literature on social protection expenditures will be reviewed.

4. Literature Review on Social Protection Expenditures for Persons with Disabilities

In recent decades, a growing body of empirical research has examined the relationship between social expenditures and key economic indicators in Turkey, including economic growth, income distribution, inflation, and unemployment. These studies have yielded significant findings that contribute to understanding the broader implications of social policy and fiscal structures in the context of a developing economy. By analyzing trends over extended periods, scholars have emphasized the multifaceted role of social spending in promoting economic stability, enhancing social equity, and shaping public finance dynamics.

Geyik and Yıldız (2021, p.17), in their analysis covering the period from 1980 to 2019, identified a unidirectional causal relationship running from tax revenues to social spending. Their study emphasizes the need to increase social spending to improve the international comparability of the welfare state and reduce income inequality. To achieve this, the authors propose the establishment of a fair and equitable tax system, advocating a shift from indirect to direct taxation. In a study focusing on social protection spending in Turkey between 1987 and 2018, Yılmaz and Rakıcı (2024, p.383) found that social protection expenditures—excluding health-related spending—contribute to reducing income inequality. Notably, a 1% increase in disability benefits was associated with a 5.70% reduction in income inequality in the long term and a 3.06% reduction in the short term.

Aydın and Öksüz (2023, p.275) analyzed the relationship between social expenditure, economic growth, unemployment, and inflation during the period 1983–2021. Their findings suggest that social expenditure exerts a statistically significant and positive impact on economic growth and employment during periods of crisis, while having a statistically significant and negative impact on inflation. Accordingly, they argue that increasing social spending in times of economic crisis may help curb inflation, and recommend such an approach (Aydın & Öksüz, 2023, p. 291).

A comparative study of social spending on the elderly in Turkey and European Union member states revealed that Turkey's expenditures in this domain are lower than those of all EU countries except Ireland (Akdoğan, 2021, p.335). In another cross-national study, Görkem (2019, p.2866) found that Turkey ranked among the bottom three OECD countries in terms of the share of public spending on disability, occupational diseases, injury, and illness relative to GDP during the 1980–2015 period.

Broadening the scope of the literature, Ersin (2019, p.2874) analyzed data from Greece, Spain, Portugal, Italy, and Turkey covering the years 1980 to 2016, identifying a causal relationship between economic growth and social expenditures. The study revealed that periods of economic contraction were often accompanied by increased social spending and argued for a recalibration of social expenditures to support sustainable economic growth, advocating for a balanced fiscal policy that supports both social welfare and macroeconomic stability.

In the context of the European Union, Sözen (2023, p.142) investigated the legal frameworks for individuals with disabilities in France, Germany, and Spain, concluding that while these frameworks are generally aligned with EU legislation, their implementation differs across countries. The study emphasized that while EU directives play a significant role in shaping national disability legislation, the effectiveness of social policy at the national level is also critical.

From a domestic perspective, Karagöz (2020, p.198) assessed the realization of the welfare state in Turkey within the context of social assistance. The study concluded that although the welfare state is institutionally and legally present, it remains insufficiently implemented in practice, particularly in terms of rights-based social assistance, spending adequacy, and oversight mechanisms.

Likewise, Bolukçu (2019, p.117) addressed the fiscal burden of social protection programs, calling for a new social security model that minimizes long-term deficits and protects future generations from unsustainable commitments.

The quality and content of social expenditures and social assistance are also a point of concern. Şahin (2023, p. 251) noted that while social assistance is expected to provide sustainable welfare for individuals with disabilities, in practice these programs in Turkey primarily alleviate the symptoms of poverty without addressing its structural causes.

Gerşil and Eryılmaz (2014, pp. 104–105) observed that between 2002 and 2012, Turkey implemented more systematic and better-funded poverty reduction programs. However, they also highlighted that the limited scope of the social security system has exacerbated both the persistence and instrumentalization of poverty. The study critically notes that the increase in social assistance allocations prior to local and national elections has led to associations between welfare provision and clientelism.

In the field of education, Akın (2020, p.223) examined home- and hospital-based educational services for individuals with disabilities, finding that recent policy developments reflect growing attention to the principles of the welfare state. The study emphasized that social protection expenditures and targeted assistance programs for individuals with disabilities are essential indicators of a functioning welfare system.

While it is possible to access a substantial number of academic studies on social expenditures in Turkey, it has been observed that the number of studies specifically addressing social assistance and social expenditures for individuals with disabilities is relatively limited. The literature review therefore highlights the need for new scientific research focusing on disability-related social policies and expenditures in the Turkish context.

5. Purpose and Method

The methodological aim of the study is to describe the current basic situation and characteristics of the expenditures on persons with disabilities by descriptive method, which is one of the qualitative research methods. Descriptive method was preferred as the method of study. Descriptive analysis is employed to illustrate the characteristics of various social phenomena. This methodology involves the calculation of frequency distributions, the categorization of scores according to specific criteria, and the presentation of these data through visual or graphical means (Blaikie, 2003, p.29). Examples of graphical representations include those employed to illustrate the frequency of specific scores obtained. The primary objective of descriptive analysis is to elucidate the manner, timing, and frequency with which a phenomenon occurs. In contrast to causal

analyses, descriptive analyses are concerned primarily with the depiction of the current state or phenomena, as opposed to inferring cause-and-effect relationships (Blaikie, 2003, p.29). Within the scope of the research, first, national and international regulations that constitute the legal basis for social protection expenditures for people with disabilities were examined together.

The research will analyze the share of social protection expenditures for individuals with disabilities within the total social protection expenditures in Türkiye, the share of those receiving disability pensions among all beneficiaries of social protection, and the comparative changes over the years in total social protection expenditures for cash/in-kind and conditional/unconditional assistance directed toward individuals with disabilities. In the study, the data preparation utilized the statistics available on the official website of the Turkish Statistical Institute (TÜİK) under the title "Social Protection" as of August 1, 2023. This study is differentiated by including an analysis of social protection expenditures in Türkiye from 2000 to 2023, specifically focusing on individuals with disabilities (TÜİK, 2022; TÜİK, 2024).

The graphs used to explain social protection expenditures for individuals with disabilities were created using data from TÜİK. During the data collection process, expenditures related to individuals with disabilities were compiled and analyzed from the social protection expenditures available on the TÜİK website. The data used in the research is based on TÜİK and publicly available statistical bulletin data, which are factual in nature and free from subjective interpretation. The economic and reliable nature of data collection are strengths of the document analysis method. However, considering the potential impact of the limitations, validity, and consistency issues of previous data when using secondary data, the importance of identifying secondary data sources becomes evident (Karasar, 2022, p.247). In selecting the secondary data used in this research, official public data from TÜİK was preferred to minimize data risks.

The present study has two principal objectives. Firstly, it seeks to deliver a thorough evaluation of contemporary disability policies and legal frameworks. Secondly, it will examine the periodic changes in social protection expenditure for people with disabilities. The research is important as it provides insights into the issues that should be focused on in explanatory studies regarding social protection expenditures for individuals with disabilities following this descriptive analysis.

Additionally, data from two studies, namely the Türkiye Disability Survey (2002) and the Survey on the Problems and Expectations of Individuals with Disabilities (2010), have been examined within the scope of this study, as provided by the Turkish Statistical Institute (TÜİK) sources. However, due to the outdated nature of the data mentioned, they have been excluded from the scope of the study. Although the Türkiye Health Research contains some updated data regarding certain disability conditions, it has been excluded from the research scope as it does not include the criteria for social protection expenditures aimed at individuals with disabilities as defined in this study.

Since the study does not involve data and sample collection from individuals, including surveys, reviews, field studies, and experiments, it does not require an ethics committee approval certificate.

Figures from the TÜİK database were used to calculate the share of expenditures within total social protection expenditures, and a year-on-year comparison method was employed in the research. Microsoft Excel was utilized for data analysis and the preparation of graphs. The calculations developed based on the data are attributed to the author.

6. Findings

Growing asymmetries in social protection spending between developed and developing nations have emerged as a critical concern in contemporary policy and development discourses. These regional disparities in social protection coverage are illustrated in Figure 2.

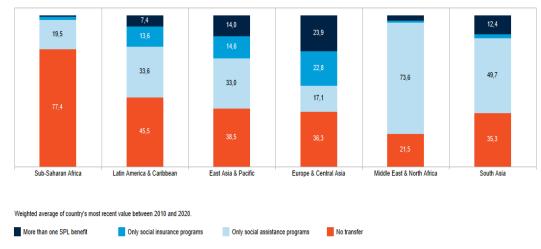


Figure 2. Coverage of Social Protection and Labor in Total Population (%). https://www.worldbank.org/en/data/datatopics/aspire/region/income-group-comparison (WB, 2023).

Figure 2 illustrates regional disparities in access to social protection benefits between 2010 and 2020. Sub-Saharan Africa shows the highest exclusion, with 77.4% of the population receiving no transfers. In contrast, Europe & Central Asia stands out with the most integrated systems, where 23.9% benefit from multiple programs. The Middle East & North Africa is dominated by social assistance (73.6%) with minimal insurance coverage, while South Asia reveals a mixed profile of high assistance (49.7%) and significant exclusion (35.3%). These differences reflect unequal institutional capacities and highlight the need for more inclusive and diversified social protection strategies globally.

At this stage of the study, public expenditures for individuals with disabilities in Türkiye have been examined considering the available data. Initially, the distribution of social protection expenditures in Türkiye between 2000 and 2023 was calculated according to risk/need groups. When considering the 24-year averages of social protection expenditures, it is understood that 46,3% of these expenditures are allocated to retirement/elderly expenses, 33,2% to illness/healthcare expenses, 11,3% to widow/orphan expenses, 3,6% to family/children expenses, and 3% to disability/disability expenses. The average share allocated for social exclusion and unemployment stands at around 1,2%. The variation in the share allocated for unemployment expenditures in 2020 and 2021 is believed to be due to the increased unemployment rates resulting from the pandemic experienced during that period.

When analyzing the distribution of social protection revenues by type, it is observed that government contributions to social protection have averaged around 42% over the last 24 years, while the average for the last five years is approximately 39%. Employer social contributions have increased to over an average of 28%, reaching approximately 29% since 2017. Individual social contributions have also risen, averaging around 25% since 2010, above the average of 23%.

The average share of disability expenditures in Türkiye within total social expenditures between 2000 to 2023 is 3%. The average for the years following 2011 is 3.5%. In recent years, there has been a noticeable increase in the share of disability expenditures within total social protection expenditures.

The assurance that individuals with disabilities can meet their personal needs unconditionally and at their discretion can be achieved through the existence of a sustainable salary/income system. The ratio of individuals receiving disability pensions to the total number of individuals receiving pensions within the social protection framework increased between 2008 and 2013. However, from 2013 to 2023, there has been a downward trend in the proportion of individuals receiving disability pensions, decreasing from around 7% to 5.1%.

Between 2008 and 2023, within the framework of social protection, the average share of individuals receiving unconditional disability pensions among all benefit recipients was approximately 1%, while those receiving conditional disability pensions accounted for around 5%. Considering that the level of disability increases with age, particularly for individuals aged 65 and over, it should be anticipated that the proportion of individuals receiving retirement/elderly pensions will also rise accordingly.

The proportion of conditional social protection assistance within risk/need groups is provided in Figure 3. Conditional assistance is social support given to beneficiaries on the condition that their income and/or assets remain below a specified level. Conditional assistance is typically financed through government contributions. The average proportion of conditional assistance within risk/need groups from 2000 to 2023 in Türkiye is 18%, while the average value for the years following 2010 is calculated to be 25%.

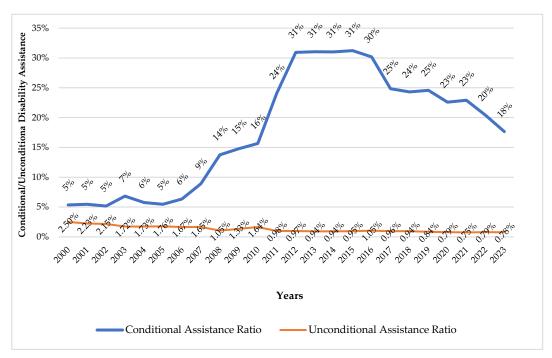


Figure 3. The Proportion of Conditional and Unconditional Disability Assistance within Total Social Protection Aid.

Created by the author using data from TÜİK (2022).

Unconditional assistance is provided without considering an individual's income and/or welfare level. The proportion of unconditional disability assistance within total social protection aid is illustrated in Figure 3. While the 24-year average for unconditional social assistance is 1.3%, the average for conditional social assistance is 18%. Between 2011 and 2023, the average proportion of conditional disability assistance was 26%, while the average proportion of unconditional disability assistance was calculated at 0.9%. Findings indicate that although both unconditional and conditional disability assistance have declined over time, the proportion of conditional assistance remains significantly higher—nearly 23 times greater—than unconditional assistance.

In-kind assistance refers to aid provided directly in the form of goods or services. In-kind assistance can also be structured as reimbursement to the beneficiary for all or part of the expenses incurred, based on invoices. The ratios of individuals with disabilities benefiting from in-kind and cash social protection assistance to those benefiting from total social protection aid are comparatively illustrated in Figure 4. While the 24-year average for cash assistance is 3%, this ratio has occurred at around 2% in recent years.

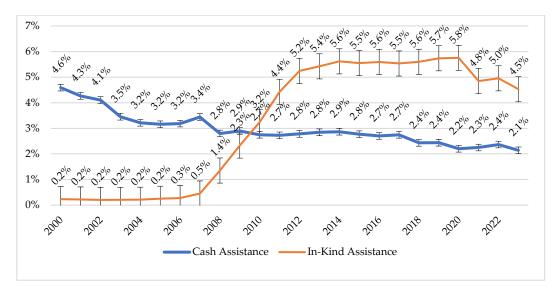


Figure 4. The Proportion of Cash/In-Kind Assistance within Total Social Protection Aid Created by the author using data from TÜİK (2024).

As shown in Figure 4, the proportion of in-kind assistance for individuals with disabilities has significantly increased after 2010 compared to previous years within social protection aid. While the 24-year average for in-kind assistance is 3,2%, the average for 2011 and beyond is 5.3%.

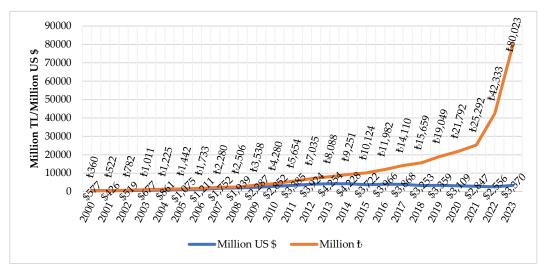


Figure 5. Comparison of Social Protection Expenditures for Individuals with Disabilities in Türkiye in Turkish Lira and U.S. Dollar Created by the author using data from TÜİK (2024).

In addition to the content of the changes in social protection expenditures for individuals with disabilities in Türkiye, a shift in the magnitude of these changes has also been observed. Figure 5 shows that while social protection expenditures in Turkish Lira increased between 2000 and 2023, this growth trend reversed when calculated in U.S. dollars based on the Central Bank of Türkiye's annual average exchange rates. Expenditures fell from 4,254 million dollars in 2013 to 2,556 million dollars in 2022.

Considering that the average disability expenditure between 2013 and 2023 was 3,503 million U.S. dollars, it is evident that, starting from 2018, disability expenditures consistently fell below the ten-year average.

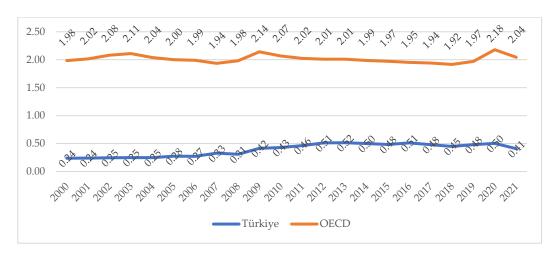


Figure 6. Public expenditure on disability and sickness cash benefits in % GDP Created by the author using data from OECD (2023).

Figure 6 presents the ratio of public expenditure on disability and sickness cash benefits to GDP between 2000 and 2021 (OECD, 2023). A comparison between Türkiye and the OECD average clearly reveals that Türkiye falls significantly below the average in terms of public spending on disability-related benefits.

7. Discussion

There are significant changes occurring at both national and international levels regarding the rights and social protection expenditures for individuals with disabilities. The aim of this study is to analyze the development and changes in social expenditures related to individuals with disabilities in Türkiye. Descriptive research methodology has been preferred in this study. The methodological aim of the study is to determine the approach to social protection expenditures for individuals with disabilities in Türkiye between the years 2001 and 2023.

It is clearly observed that the weight of retirement/elderly expenditures within social protection expenditures in Türkiye is gradually increasing. However, the negative trend in social protection expenditures between 2013 and 2023 indicates the need for new regulations regarding social protection spending. While the government's contribution to social protection income has decreased, it is understood that the proportions of employer and individual social contributions within total income have increased. Particularly, expanding the participation of disadvantaged groups, especially individuals with disabilities, in the workforce can lead to an increase in employer and individual social contributions.

In recent years, there has been a clear increase in the share of disability/handicapped expenditures within total social protection expenditures in Türkiye. While the European Union allocates 2.2% of GDP for individuals with disabilities, the share allocated in Türkiye is only 0.4% (Eurostat, 2020). In Türkiye, to reach the level of social protection expenditures for individuals with disabilities seen in the European Union, it is necessary to develop new social policies. Measurable strategic goals could be established, such as increasing the share of disability expenditures within total social protection expenditures from 3% to 5% or more, with a primary focus on enhancing expenditures tailored to the needs of individuals with disabilities.

The findings obtained from the research indicate that, despite an increase in social protection expenditures for individuals with disabilities in Türkiye, there has been a statistically significant decrease in the proportion of individuals receiving disability pensions between 2013 and 2023. As of July 2023, the number of individuals with disabilities in Türkiye was 2,511,950, comprising 1,414,643 males and 1,097,307 females.

This data indicates the need for more detailed and comparative tracking of the number of individuals with disabilities in relation to those receiving disability pensions.

While unconditional disability/injury benefits are decreasing, there is a significant increase in the rate of conditional disability/injury benefits in Türkiye. It is observed that practices regarding social protection aid for disabled/injured individuals are shifting from cash assistance to in-kind aid. When all the findings are examined together, it is noted that conditional aid, conditional allowances, and in-kind aid preferences are being adopted in social protection expenditures for disabled individuals in Türkiye. The findings obtained in the study show that while the proportion of those receiving disability pensions in social protection expenditures in Türkiye is relatively decreasing, there is a rising trend in social support for disabled individuals. The findings align with the observations made by Alcock and colleagues (2011), stating that 'increasing support for those with a higher degree of disability coincides with a decrease in the number of individuals receiving disability pensions.

Although there has been a positive upward trend in social protection expenditures in Turkish Lira terms between 2000 and 2023, the increase observed until 2013 has been replaced by a decline in expenditures when the data is calculated in U.S. Dollars. With the rapid rise in exchange rates and fluctuations in inflation, although it may seem that the level of spending on disabled individuals is increasing in TL terms, the risk of a decline in inflation-adjusted expenditures should be considered.

It has been found that there is a clear differentiation in the amount of expenditures as well as conditional/unconditional, in-kind/cash transformation in social protection expenditures for the disabled. The findings show that the decrease in disability expenditures is not only limited to the decrease in social protection expenditures, but there has also been a negative trend in expenditures for the disabled in GDP in recent years. As Şahin (2023) states in his study, it is thought that for social assistance in Türkiye to transform from practices aimed at alleviating the effects of poverty to the quality of combating poverty, the social protection models of developed countries for the disabled should be examined.

Increasing social expenditures for people with disabilities is critical not only for improving individual welfare levels but also for strengthening social justice. As highlighted by Geyik and Yıldız (2021), the establishment of a more equitable tax system that shifts from indirect to direct taxation can enhance the fiscal capacity for such expenditures. Yılmaz and Rakıcı (2024) also found that disability-related spending has the potential to reduce income inequality, contributing to multidimensional social policy outcomes. In light of Türkiye's post-pandemic inflationary environment, Aydın and Öksüz (2023) emphasize that disability-related social protection spending may play a role in mitigating inflation, thereby supporting the study's overall finding that such expenditures should be increased.

International comparative studies further reveal Türkiye's room for improvement in this area. Akdoğan's (2021) comparative analysis of elderly-related social expenditures between the EU and Türkiye also shows that Türkiye lags behind the EU average in disability-related spending. Similarly, Görkem (2019) demonstrates that Türkiye ranks among the lowest within OECD countries in terms of public expenditures on disability and occupational disease. These findings are consistent with the present study's conclusion that social protection spending for people with disabilities must be increased in alignment with international standards.

When all the findings on expenditures on disabled people in Türkiye are considered together, it is clearly seen that there is a need to develop public policies that will increase the share of social protection expenditures in GDP and improve their welfare levels. However, when developing public policies, we believe that central or local governments should avoid attitudes that could lead to the association of social assistance practices with clientelism as stated in the research by Gerşil and Eryılmaz (2014: 226).

8. Conclusion

Significant transformations have occurred in social policy frameworks concerning the rights of people with disabilities at both national and international levels. Developments in disability rights within global institutions such as the United Nations, OECD, and the European Union have increasingly influenced national policy agendas. This study draws upon official institutional reports and data provided by the Turkish Statistical Institute (TÜİK) to analyze trends in disability-related social protection in Türkiye.

In recent years, Türkiye has introduced important public policy initiatives aimed at enhancing the social protection of individuals with disabilities. This shift is reflected in the notable increase in social assistance expenditures. Assessing the extent to which individuals with disabilities benefit from these expenditures remains a critical research concern, particularly given the strong correlation between social spending and overall social development. The analysis reveals that while progress has been made in increasing disability-related public spending, structural imbalances persist. Notably, employment among individuals with disabilities in the public sector has increased significantly, yet employment opportunities in the private sector remain limited. Furthermore, the structure of social protection spending has shifted toward in-kind and conditional assistance, and the prevalence of conditional pensions has grown in recent years. These changes highlight an evolving welfare model that increasingly emphasizes conditionality and targeted support mechanisms. Although the proportion of disability-related expenditures appears stable at around 3% compared to other risk groups, the total amount of spending has declined when measured in U.S. dollars. In addition, while the share of government contributions to social protection income has relatively decreased, employer and individual contributions have shown a gradual increase. The long-term sustainability of these parafiscal sources requires the continued implementation of rational monetary and fiscal policies-particularly in combating informal employment and ensuring inclusive labor market participation.

The study underscores the need for further comparative quantitative and qualitative research into disability-related social protection. In contemporary welfare governance, not only central governments but also local authorities, the private sector, and civil society organizations play critical roles. Therefore, it is recommended that social protection expenditures be examined holistically across these different institutional actors. Integrating policies targeting disadvantaged groups across all policy domains and establishing a robust system of monitoring and evaluation could substantially strengthen the effectiveness of social protection. To this end, the creation of an independent administrative authority—comprising representatives from central government, local administrations, and civil society—could help ensure accountability, transparency, and participatory policy development.

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