

Bridges for Vocational Training between Germany and Turkey



NEEDS ASSESSMENT STUDY FOR VOCATIONAL TRAINING

Afyonkarahisar, Kütahya, Uşak

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U Ş A K T İ C A R E T V E S A N A Y İ O D A S I

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Executive Summary

During the second half of the 20th century, significant changes have occurred in World trade, industries and labor markets due to the interplay of globalization, deregulations in trade and developments in technology & communications which all have caused a serious competition that doesn't respect any geographic boundaries. This competitive environment led to an increased need for qualified workforce in a vast majority of countries. In order to eliminate youth employment and create a qualified workforce capacity in line with the requirements of the business and industry sectors, vocational education and training (VET) systems around world gained significant attention.

Efforts regarding the improvement and promotion of (VET) system in Turkey also gained a significant momentum. The main reason behind was Turkey's high and young population with considerably weak links to business sectors and industries. Moreover, existing VET opportunities needed modernization in line with new developments in science and technology.

Turkey became a candidate country for EU membership after the Helsinki European Council of 1999 and accession negotiations started with by 2005 which aim to provide a harmonization for Turkey with the EU legislation. Improving the VET systems in Europe also had an important place at the Union's Agenda and with respect to expectations for a European Union member Turkey in the future, much cooperation among both sides took place since then. Further cooperation is currently ongoing.

With this regard, the project 'Bridges for Vocational Training between Germany and Turkey' was initiated by Uşak Chamber of Industry and Trade (UCIT) in order to improve Vocational Education and Training in the region and benefit from the knowledge and experience of Chambers in Germany on VET systems. The overall objective of the project is to establish a mutually beneficial and sustainable relationship between chambers in Uşak, Kütahya and Afyonkarahisar and in Cologne and Munich (Germany) via exchanging experience.

This needs assessment report has been prepared in line with the objectives of the 'Bridges for Vocational Training between Germany and Turkey' project in order to reflect the current situation of the project provinces and to enlighten the road for better VET services by effective cooperation with the German partners. The report presents a brief examination of VET system in Turkey with policy aspects and provides relevant data on Uşak, Afyonkarahisar, Kütahya and Turkey in general. The information gathered is compared with selected countries and supported with the results of the regional surveys and consultation meetings.

1. 'Bridges for Vocational Training between Germany and Turkey' Project and the role of the Chambers

The project 'Bridges for Vocational Training between Germany and Turkey' was initiated by Uşak Chamber of Industry and Trade (UCIT) in order to improve Vocational Education and Training (VET) in the region and benefit from the knowledge and experience of Chambers in Germany on VET systems. The project is supported by the EU under the Civil Society Dialogue – Turkey Chamber Forum II (ETCF-II), and it is projected to last in 12 months.

The overall objective of the project is to establish a mutually beneficial and sustainable relationship between chambers in Uşak, Kütahya and Afyonkarahisar and in Cologne and Munich (Germany) via exchanging experience. The specific objectives of the project are listed as: strengthening the institutional capacity of chambers Uşak, Kütahya and Afyonkarahisar in the field of vocational training by transfer of knowledge from the chambers in Germany; and, ensuring a stronger awareness of the opportunities and challenges of EU accession of Turkey in the field of vocational training

The Chambers in Germany have important roles in performing vocational training services and they are remarkably active in the provision of these services. They are also acting as competent bodies' that are responsible for advising companies, registering trainees, certifying trainers' specialist aptitude, accepting examinations and conducting regional social dialogue in terms of VET. Munich and Cologne chambers are known to be very experienced in providing these services. Also, they are providing trainings in several different subjects through vocational education centers.

It is estimated that the project will strengthen the institutional capacities of Uşak, Afyon and Kütahya Chambers for VET services and support the creation of sustainable relationships between chambers Uşak, Kütahya and Afyonkarahisar with chambers in Cologne and Munich. Moreover it is expected that the implementation of the project will increase the awareness of the opportunities and challenges of EU accession of Turkey in the field of VET. Although the main target group of the project is the Chambers in the region, the project will also significantly improve the capacity of other relevant institutions including İŞKUR, universities, ESOBs, national education directorates, vocational schools and other related parties. In the end, the project will benefit not only the Chambers, but also VET students, teachers, unemployed people and finally the SME's in the region.

Subsequently, this needs assessment report has been prepared in line with the objectives of the 'Bridges for Vocational Training between Germany and Turkey' project since it aims to reflect the

current situation of the project provinces and to enlighten the road for better VET services in the region by effective cooperation with the German partners. The report presents a brief examination of VET system in Turkey together with policy aspects and provides relevant data on Uşak, Afyonkarahisar, Kütahya and Turkey in general. The information gathered is compared with selected countries and supported with the results of the regional surveys and consultation meetings.

2. Vocational Education and Training (VET) in Turkey

2.1. Vocational Education and Training System in Turkey

In Turkey education is one of the main functions of the state such as justice, security and health services; and, the system is operated under the control and supervision of the state. The National Education system is determined by the Ministry of Education (MoNE) and regulated by the Basic Act on National Education No. 1739 which consists of two main parts titled “formal education” and “non-formal education”. Non-formal education comprises all the educational activities excluding formal education in accordance with the general objectives and basic principles of national education.

Formal education in Turkey has been recently transformed into a fully obligatory three phased structure of 12 years including the 4-year primary education, 4-year lower secondary education and a 4-year secondary education. The secondary education system is assorted as general secondary education and vocational and technical secondary education. Vocational and Technical Education in Turkey also includes formal, non-formal and apprenticeship education activities based on Lifelong learning approach which aims to enable primary education graduates to excel in a specific vocational field. Formal vocational and technical secondary education is divided into two as: vocational high schools and technical high schools. Vocational and technical secondary school graduates are allowed to participate to two-year higher education institutions related with their field of study without any examination¹. Non-formal vocational and technical education is mainly for people who never had participated to formal education system in Turkey or for people who had left the system at some point of their education. Individuals participate to non-formal education system in order to obtain knowledge and skills they need and it includes courses that are opened at vocational and technical secondary education schools, public education centers, apprenticeship education, theoretical, practical courses or in-service education/courses in line with business sector.

¹ Revised Human Resources Development Operational Programme: Third Version. Online available at: http://mesbil.meb.gov.tr/genel/mesleki_egitim_sistemi/meslekiegitimyeni.pdf

Vocational and Technical Education Schools under MoNE is given below²:

- Technical High Schools/ Technical High Schools for Girls
- Anatolian Vocational High Schools / Anatolian Vocational High Schools for Girls
- Anatolian Vocational High Schools for Commerce
- Anatolian Vocational High Schools for Tourism and Hotel Management
- Anatolian Vocational High Schools for Communication
- Anatolian Vocational High Schools for Agriculture/ Vocational High Schools for Agriculture
- Anatolian Vocational High Schools for Land Registry and Cadastral
- Anatolian Vocational High Schools for Meteorology
- Anatolian Vocational High Schools for Health / Vocational High Schools for Health
- Anatolian Vocational High Schools for Justice
- Vocational High Schools for Industry
- Vocational High Schools / Vocational Schools for Girls
- Vocational High Schools for Commerce
- Vocational and Technical Education Centers (METEM)
- Multiprogram High Schools

Non-Formal Vocational and Technical Education Facilities include:

- Institutes of Technical Education and Finishing Schools for Girls
- Dual Vocational Education Centers
- Vocational Education Centers
- Technical Education Centers for Adults
- Practical Arts Schools for Girls
- Tourism Education Centers(TUREM)
- Public Education Centers
- Private Non-formal Education Institutions
- Vocational High Schools for Open Education
- Vocational and Technical Schools for Open Education

In terms of further education; two-year post-secondary vocational education programs, four-year programs providing bachelor degrees, masters and PhD programmes are available for individuals who want to proceed with higher education .Vocational and technical higher education is provided by two-year vocational and technical higher schools and by four-year technical education faculties of the universities. While two-year programmes were mainly established to meet the personnel and technician need of the industrial sectors; four-year Vocational, Industrial Arts, Technical, Trade and Tourism Education faculties build the teacher & trainer capacity of technical schools³.

² Ministry of Education, 2010. Vocational Education and Training in Turkey: Strategy Document 2010-2013. Online available at: [http://abm.tobb.org.tr/haberler/Mesleki%20Egitim%20Strateji%20Belgesi%20\(taslak\)-%202010.pdf](http://abm.tobb.org.tr/haberler/Mesleki%20Egitim%20Strateji%20Belgesi%20(taslak)-%202010.pdf)

³ Şahin, İ. Tayfun, F. 2008. Vocational and Technical Education in Turkey: Current Status, Challenges and recommendations. Online available at: http://perweb.firat.edu.tr/personel/yayinlar/fua_101/101_49959.pdf

2.2. Main Documents and Projects on Vocational Education and Training (VET) in Turkey

Efforts regarding the improvement and promotion of vocational education and training system in Turkey gained a significant impetus since the beginning of the new millennium. The main reason behind was Turkey's high and young population with considerably weak links to business sectors and industries. Moreover, existing vocational education and training opportunities needed modernization in line with new developments in science and technology.

Turkey became a candidate country for EU membership after the Helsinki European Council of 1999 and accession negotiations started with by 2005. The negotiations aim to provide a harmonization for Turkey with the EU legislation. Improving the VET systems in Europe also had an important place at the Union's Agenda and with respect to expectations for a European Union member Turkey in the future, much cooperation among both sides took place since then. Further cooperation is currently ongoing.

2.2.1. Main Documents on Vocational Education and Training (VET) in Turkey

9th National Development Plan (NDP) and Mid – Term Programme 2011 – 2013⁴

Turkey's 9th National Development Plan covers the 2007 – 2013 period and it is the main policy document that defines Turkey's economic, social and cultural priorities. These priorities include but are not limited to: increasing competitiveness, employment and strengthening the human capital and social solidarity. The priorities presented in this document established a solid basis for efforts towards improving the education system, the labor market conditions and the establishment of effective linkages between them.

The Mid – Term Programme 2011–2013 was presented in 2010 and the document mainly reorganized the priorities to be focused for the given period of time, in order to reach the long term-objectives that are set by the 9th NDP.

Human Resources Development Operational Programme of Turkey

Vocational Education and Training in Turkey also has an important place in terms of Human Resources Development Operational Programme of Turkey⁵. As an EU Candidate country, Turkey is

⁴ Revised Human Resources Development Operational Programme: Third Version. Online available at: <http://ikg.gov.tr/web/Portals/0/Docs/elibrary/Revised%20HRD%20OP.pdf>

⁵ Revised Human Resources Development Operational Programme: Third Version. Online available at: <http://ikg.gov.tr/web/Portals/0/Docs/elibrary/Revised%20HRD%20OP.pdf>

eligible for accessing all components of Instrument Pre-Accession (IPA) funds and the program is developed in order to improve employment possibilities in transition period to information society and to encourage social cohesion by supporting projects in the fields of employment, training, life-long learning and social inclusion through IPA funds for the period of 2007-2013⁶. The priority areas of the programme include promoting labor force participation and employment of especially women and young people, increasing the quality of vocational education and training and promoting Life Long Learning opportunities which will contribute to strengthen the link between human resources and labor market needs.

2011-2014 Industrial Strategy Document of Turkey⁷

2011-2014 Industrial Strategy Document of Turkey mainly presents the competitive position of Turkey in terms of industry. Current and prospective challenges for the sector are given as well as the future industrial strategy of the country which urges the need for increasing supply and demand of qualified workforce in line with Turkey's industrial strategies and contribute to the competitiveness of the sector.

Ministry of Education Strategic Plan 2010-2014⁸

The first strategic plan of MoNE has been prepared in 2009 in accordance with Turkey's EU vision and it covers the 2010-2014 period. The plan constitutes one of the main policy reference documents for the education system, as well as the legislations governing the education system in Turkey.

With regards to VET system in Turkey, the Ministry's main strategic goal is defined as to reach a more attractive VET system that is built on a strong technological infrastructure and has effective connections with real sectors with a diversity of flexible and modular education programmes. The document clearly states that the education system lacks effective career guidance for individuals in line with their own skills and interests as well as the promotion of vocational education and training. Furthermore, VET system suffers from not having adequate connections with relevant industries. MoNE's strategic plan emphasis' on the harmonization process with the EU and states that relevant EU policies must be taken into account while implementing the plan.

⁶ http://www.abfonlari.gov.tr/english/?page_id=754

⁷ Republic of Turkey Ministry of Industry and Trade, 2010. Turkey's Industry Strategy Document 2011-2014. Online available at: http://www.sanayi.gov.tr/Files/Documents/sanayi_stratejisi_belgesi_2011_2014.pdf

⁸ Republic of Turkey Ministry of Education, 2009. Ministry of Education Strategic Plan 2010-2014. Online Available at: http://sgb.meb.gov.tr/Str_yon_planlama_V2/MEBStratejikPlan.pdf

Vocational Education and Training in Turkey Strategy Document 2010-2013⁹

This Strategy Document has been prepared in accordance with the Strategic plan of MoNE and with some big scale projects implemented throughout the country including ‘Strengthening the Vocational Education and Training System in Turkey (SVET) and ‘Human Resources Development through Vocational Education and Training Project (HRD-VET)’.

The Strategy Document groups 24 strategic goals that are designed in order to respond to the specific needs of Turkish VET system, into 6 general principles in line with the common VET policies of the EU. These principles are:

- Strengthening the coherence between VET and employment
- Increasing quality
- Improving the status of VET
- Supporting the social inclusion
- Mobilizing the financial resources for VET
- Decentralized management in order to increase efficiency in VET

Strengthening the Relationship between Vocational Education & Training and Employment Action Plan

The Action plan has been prepared by solid contribution of relevant institutions in Turkey including but not limited to MoNE, Ministry of Labor and Social Security, Ministry of Trade and Industry, Higher Education Council, Professional Competence Council and Vocational Qualifications Authority.

The Action plan for Strengthening the Relationship between Vocational Education & Training and Employment presents 9 priority areas including the list of actions to be implemented in coordination by different institutions. Most of the actions are designed to be realized between 2010 and 2011, however some of them represent a continuum. The priority areas are listed as¹⁰:

- The establishment of a National Qualifications Framework
- Updating and harmonizing the education programmes in accordance with national vocation standards.
- Realizing and assessing needs assessments analysis’ for labor market
- Improving the facilities dedicated for VET, increasing the quality of VET and designing a new school management system
- Accreditation of relevant VET organizations and institutions
- Sustaining cooperation with the EU while implementing Union’s tools for VET mobilization and vocational qualifications
- Increasing cooperation for increasing the effectiveness of vocational courses

⁹ Republic of Turkey Ministry of Education, 2010. Vocational Education and Training in Turkey Strategy Document 2010-2013. Online available at: [http://abm.tobb.org.tr/haberler/Mesleki%20Egitim%20Strateji%20Belgesi%20\(taslak\)-%202010.pdf](http://abm.tobb.org.tr/haberler/Mesleki%20Egitim%20Strateji%20Belgesi%20(taslak)-%202010.pdf)

¹⁰ Strengthening the Relationship between Vocational Education & Training and Employment Action Plan, 2010. Online available at: http://www.google.com.tr/url?sa=t&rct=j&q=&esrc=s&frm=1&source=web&cd=6&cad=rja&ved=0CEgQFjAF&url=http%3A%2F%2Fwww.kalkinma.gov.tr%2FDocObjects%2FDownload%2F12648%2F%25C4%25B0stihdam_ve_Mesleki_Egitim_%25C4%25B0li%25C5%259Fkisinin_G%25C3%25BC%25C3%25A7lendirilmesi_Eylem_Plan%25C4%25B1_07.07.2010.pdf&ei=f48kUc_bKqql4ATU4oDADQ&usg=AFQjCNFPAXQ2zCgqeGpehmULRHPrDWE2Yg&bvm=bv.42661473,d.bGE

- Creating support mechanisms for the employment & entrepreneurship activities of VET graduates and individuals who have vocational qualification certificates
- Improving the cooperation environment within the context of Improving the Cooperation Environment for Vocational Knowledge, Guidance and Career Services Memorandum of Understanding.

2.2.2. Main Projects on Vocational Education and Training (VET) in Turkey

Strengthening Vocational Education and Training System in Turkey Project (SVET)

Strengthening Vocational Education and Training Project (SVET) was funded by the EU and implemented during 2002-2007. The Project mainly aimed to strengthen Turkish VET system in line with the socio-economic needs of the country and the principles of lifelong learning. The main objective of the Project was improving the Turkish VET system up to the EU standards. The Project implemented in 140 pilot institutions throughout 30 provinces of Turkey. The Project supported the development of standards for VET modules, training of VET teachers, principals and students. Also, VET Information Centres were established¹¹.

Human Resources Development through Vocational Education and Training Project (HRD-VET)

Funded by the EU in 2008 for a period of 24 months, this project aimed to improve Turkey's labor force and contribute to the development of SMEs and their competition by increasing the quality of vocational education in 8 selected provinces of Eastern and Southeastern Anatolia Region. Moreover, 8 sectors were identified as pilot sectors including Communication, Electrics and Electronic, Machinery, Automotive, Textile, Tourism, Metal works, computer and nutrition. Implementation of the project included development of new curricula in 8 pilot sectors through the analysis of the provinces; and, the supply of modern equipment to selected vocational education institutions in the region.

Specialised Vocational Centres (UMEM) Skill'10 Project¹²

The most significant problem behind unemployment is people with 'no profession'. Turkey has been experiencing difficulties due to its unskilled worker surplus for some time; however the employees are raising their voices against not being able to find qualified employees for their businesses. In this context, "The Project of Specialized Vocational Centres (UMEM) Skill'10" has been initiated in order to bring out a solution for this imbalanced supply and demand in labor market. The project proclaims that it is about gaining skills and mobilization for jobs.

The Project started in 19 provinces following the completion of its protocol among Turkish Union of Chambers and Exchange Commodities, Ministry of Labor and Social Security, Ministry and of National

¹¹ Revised Human Resources Development Operational Programme: Third Version. Online available at: <http://ikg.gov.tr/web/Portals/0/Docs/elibrary/Revised%20HRD%20OP.pdf>

¹² Specialised Vocational Centres (UMEM) Skill'10 Project Website, (). Online available at: <http://www.becer10.org.tr/>

Education and TOBB Economy and Technology University. Currently, the project covers all provinces of Turkey.

The implementation of the project provides benefits for both employers and potential employees. Unemployed people can apply to participate vocational training of 6 months. During the theoretical and practical training period, they will also be paid on a daily basis. Successful participants will be employed by the company.

From the employers' point of view, they have an opportunity to secure the opening of relevant courses for their businesses. They are able to see the work of their potential employees on work before they hire them, with no charges. Also, they are allowed to benefit from employment incentives.

Improving the Quality of Vocational Education and Training in Turkey Project¹³

The overall objective of the project is to 'promote investment in human resources by increasing the quality of VET and improving the linkages between the labour market and vocational education'.

The purposes of the Project are as follows:

- To increase the quality of vocational and technical education and training by addressing curriculum, teachers, learning environment and school managers
- To increase the flexibility of the education system by facilitating vertical and horizontal transitions between different types of programmes in the VET system,
- To make VET an attractive option for students,
- To promote cooperation between social partners, schools and VET centres and private sector

The implementation of the project is foreseen between the period of March 2012 and May 2014.

Currently 21 provinces of Turkey have been selected as pilot provinces¹⁴.

¹³ Improving the Quality of Vocational Education and Training Project Website. Online available at:

<http://metek.meb.gov.tr/index.php/tr/proje>

¹⁴ Afyonkarahisar, Kütahya and Uşak are not included to the list of pilot provinces.

3. General Data on the Region

3.1. General Information on The Project Provinces

The province Uşak is located in the central eastern part of the Aegean Region of Turkey, situated in 5341 km² area of land and its neighboring provinces are: Kütahya, Afyonkarahisar, Denizli and Manisa. The city is famous with its unique hand-woven carpets and its cuisine, particularly with a traditional Turkish soup named “tarhana”. The people of Uşak are known with their entrepreneurial character. The first private investment of the Turkish Republic, a sugar factory, was opened in Uşak making the city known as “the city of firsts”¹⁵.

Afyonkarahisar is also located in the Aegean Region, the inner western part of Anatolia. The city has a surface area of 14570 km²¹⁶. Its neighboring provinces are Konya, Uşak, Kütahya, Denizli, Burdur, Isparta and Eskişehir. The city is strategically located at the crossroads of Turkey’s big cities including İstanbul, Ankara, İzmir and Antalya. Afyonkarahisar has an important place in the history of Turkish Republic due to its significant role in the War of Independence. Opium plantation under the supervision of the State is an important agricultural activity in Afyon which has given its name by the mispronunciation of the Opium in time. Afyon is also known with its marble production. Moreover the city has a great potential in terms of thermal energy and becoming an important center for thermal tourism.

The province Kütahya is located in the North-eastern part of the Aegean region on 11.875 km² area of land. Its neighboring provinces are: Bursa, Bilecik, Eskişehir, Afyon, Uşak, Manisa and Balıkesir¹⁷. Kütahya is worldwide famous with its tiles and the city has the world’s first and only tile museum. Kütahya also has a memorable place in the history of Turkish Republic since important battles took place on its land.

3.2. Population of the Project Provinces

According to the address based population census of 2012¹⁸, the population of Turkey is 75 627 384 people. The total population of the three project provinces is nearly %2, 1 of Turkey’s population with 1 619 638 people by the end of 2012. While Turkey’s total annual growth rate of population was %0.12.01 in 2012, the region including Uşak, Afyon and Kütahya remained around %0.7.3, lower than Turkey average.

¹⁵ Zafer Development Agency, 2010. TR33 Region Report on Current Status.

¹⁶ Afyonkarahisar Municipality, 2013. Online available at: <http://www.afyon-bld.gov.tr/tr/icerikdetay/4/4/konumu.aspx>

¹⁷ Governorship of Kütahya, 2013. Online Available at: http://www.kutahya.gov.tr/tab_icerik.php?cat=cografya

¹⁸ TURKSTAT, results of the address based population census of 2012.

For the period between 2007 and 2011 outbound migration level of the Afyonkarahisar, Uşak and Kütahya remained higher than the inbound migration level, corresponding to 44 930 people leaving the region (Foreign population is not included)¹⁹.

Table.1. Population by Province and Gender

Year	Gender	Total	Uşak	Afyon	Kütahya
31.12.2007	T	70 586 256	334 115	701 572	583 910
	M	35 376 533	165 235	348 589	296 167
	F	35 209 723	168 880	352 983	287 743
31.12.2008	T	71 517 100	334 111	697 365	565 884
	M	35 901 154	165 506	345 899	280 370
	F	35 615 946	168 605	351 466	285 514
31.12.2009	T	72 561 312	335 860	701 326	571 804
	M	36 462 470	166 944	348 194	285 911
	F	36 098 842	168 916	353 132	285 893
31.12.2010	T	73 722 988	338 019	697 559	590 496
	M	37 043 182	168 064	344 822	305 634
	F	36 679 806	169 955	352 737	284 862
31.12.2011	T	74 724 269	339 731	698 626	564 264
	M	37 532 954	169 343	347 311	279 162
	F	37 191 315	170 388	351 315	285 102
31.12.2012	T	75 627 384	342 269	703 948	573 421
	M	37 956 168	169 997	348 548	284 909
	F	37 671 216	172 272	355 400	288 512

According to the address based population census of 2012, the population of Uşak is 342 269 people. While 68.3% of the population is living in the province and district centers, 31.7% is living in towns/villages. The population density of Uşak for persons per km² is 64, lower than the Turkey average of 98. Moreover, the annual growth rate of population of Uşak was approximately %7 during 2011-2012, which is also lower than the Turkey average of %12.01²⁰. Uşak's biggest districts in terms of the size of population can be listed as Merkez, Banaz and Eşme. There are 6 districts, 24 municipalities and 244 villages in Uşak²¹. Out-migration level remained higher than in-migration level with – 4 556 net migration between 2007 – 2011 period. Main destinations include İzmir, İstanbul, Antalya and Manisa respectively²².

The population of Afyonkarahisar is 703 948 people by the end of 2012 and it is the most populated one within the three project provinces. While 53.6% of the total population is living in the province

¹⁹ TURKSTAT, 2012. Migration Statistics: Provincial in-migration, out-migration, net migration and rate of net migration.

²⁰ TURKSTAT, Results of the address based population census of 2012

²¹ TURKSTAT. Regional Indicators TR33, 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

²² TURKSTAT, 2013. Migration Statistics 2011.

and district centers, 46.3% is living in towns/villages. The population density of Afyonkarahisar for persons per km² is 49, lower than the Turkey average. Furthermore, the annual growth rate of population of the province was approximately %7.6 during 2011-2012, which is also lower than the Turkey average²³. Afyonkarahisar's biggest districts in terms of the size of population can be counted as Merkez, Sandıklı, Dinar and Bolvadin. There are 18 districts, 107 municipalities and 388 villages²⁴. Out-migration level was higher than in-migration level with – 22 136 net migration between 2007 – 2011 period, mainly directed to big city centers including İstanbul, Antalya, İzmir respectively²⁵.

As of 2012, the total population of Kütahya is 573 421 people. While 65.4% of the population is living in the province and district centers, around 34.6% is living in towns/villages. The population density of Kütahya for persons per km² is 48, almost the half of the Turkey average of 98 people. Moreover, the annual growth rate of population of Uşak was approximately %7.4 during 2011-2012, which is also lower than the Turkey average of %12.01²⁶. Kütahya's largest districts in terms of the size of population can be listed as Merkez, Tavşanlı, Simav and Gediz. There are 13 districts, 72 municipalities and 511 villages in Kütahya²⁷. Like the other project provinces, out-migration level remained higher than in-migration level with – 18 238 net migration within 2007 – 2011 period. In 2011, main destinations for out migration were İstanbul, İzmir and Bursa respectively. Also proximate cities including Manisa, Eskişehir and Ankara can be counted in this respect²⁸.

3.3. Socio -Economic Environment

In 2011, Ministry of Development completed a research named “Socio-Economic Development Ranking of Turkey by Provinces” which enabled to monitor the comparative economic and social development performances of the provinces. A study in this context was not conducted since 2003. According to results of this research *Uşak*, *Kütahya* and *Afyonkarahisar* ranked 25th, 38th 43rd (30th, 40th and 44th in 2003²⁹) respectively among 81 provinces of Turkey³⁰.

In terms of urbanization rate, gross domestic product per capita and the share of employment in industry of total employment rates, all three project provinces ranked below Turkey averages.

²³ TURKSTAT, Results of the address based population census of 2012.

²⁴ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

²⁵ TURKSTAT, 2013. Migration Statistics 2011.

²⁶ TURKSTAT, Results of the address based population census of 2012

²⁷ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

²⁸ TURKSTAT, 2013. Migration Statistics 2011.

²⁹ State Planning Organisation, 2003. Socio-Economic Development Ranking Research of Provinces and Regions, 2003.

³⁰ Ministry of Development, 2011. Available at: <http://www.ika.org.tr/NewsDownload/sege2011.pdf>.

However, the share of employment in the agricultural sector to total employment is higher compared with Turkey average³¹.

In Uşak, the relatively small amount of suitable land for agriculture made industrialization a necessity.

Agriculture and animal husbandry are one of the main sources of income in *Afyonkarahisar*. While fruits, vegetables and grains are widely cultivated; industrial plants such as opium, potatoes, sunflower and sugar beet are also produced. *Afyonkarahisar* has a leading position in animal husbandry compared to neighboring provinces, particularly with respect to chicken farming and egg production. In terms of industry, significant development has not seen till recent years. Due to important investments particularly in the manufacturing industry, progress has been achieved in recent years. Extraction and processing of marble is also one of the main sources of income. Other important products can be counted as 'sucuk' (fermented sausage), 'kaymak' (a traditional kind of cream) and Turkish delight. Moreover, *Afyonkarahisar* has great potential in terms of thermal energy and it is an important destination for thermal tourism.

Kütahya's economy is traditionally based on agriculture and animal husbandry in which industrial plants such as sugar beet, opium and cannabis took important place. Kütahya also has a great potential in terms of thermal energy and thermal tourism; and, it is one of the provinces in Turkey that use thermal resources in urban heating as well as greenhouses. Last but not least, Kütahya is known with its ceramics and tile manufacturing which consists one of the main sources of income in the province.

3.4. Foreign Trade

When project provinces are analyzed in terms of exports per capita by each province, the highest shares belong to Uşak, *Afyonkarahisar* and Kütahya respectively. This presents a lower position than other regional provinces. A different alignment can be seen in terms of imports per capita. While the lowest rate belongs to *Afyonkarahisar*, Uşak has the highest rate and followed by Kütahya³².

³¹ TURKSTAT. Regional Indicators TR33 2010: Manisa, *Afyonkarahisar*, Kütahya, Uşak.

³² Zafer Development Agency, 2010. Current Status Report of TR33 Region: *Afyonkarahisar*, Kütahya, Manisa, Uşak.

Table.2. Imports & Exports per capita by 2008³³

Location	Exports per capita (USD)	Imports per capita (USD)
Afyonkarahisar	341	49
Kütahya	202	161
Uşak	349	241
TR33 Region	511	361
TR32 Region	1 114	712
TR31 Region	2 061	2 190
Aegean Region	1 310	1 201
Turkey	1 846	2 824

Table.3. 2012 Imports-Exports³⁴

Location	Exports (000\$)	Imports (000\$)
Afyonkarahisar	314 481	62 578
Kütahya	145 487	119 628
Uşak	171 585	194 214
TR33 Region	4 836 423	3 994 960
TR32 Region	3 579 414	2 672 482
TR31 Region	8 663 535	10 576 704
Aegean Region	17 079 372	17 244 146
Turkey	152 560 775	236 536 949

Compared to other regional provinces, project provinces' exports are at the average levels for mining, stone quarrying and retail trade sectors. However exports rank lower in agriculture & forestry and manufacturing sectors. No exports are reported from fishing, electricity, gas, water supply and other social and personal services sectors.

Table.4. Exports by Project Provinces 2007-2012³⁵

Location	2007	2008	2009	2010	2011	2012
Afyonkarahisar	193 705	237 839	208 636	217 225	291 682	314 481
Kütahya	89 216	114 374	101 774	120 037	153 768	145 487
Uşak	115 276	116 760	96 903	114 759	145 379	171 585
Turkey	107 271 750	132 027 196	102 142 613	113 883 219	134 906 869	152 560 775

³³ Zafer Development Agency, 2010. Current Status Report of TR33 Region: Afyonkarahisar, Kütahya, Manisa, Uşak.

³⁴ TURKSTAT, 2012. Foreign Trade by Provinces.

³⁵ TURKSTAT, 2012. Exports by Provinces

Table.5. Exports of Afyonkarahisar by Economic Activity 2005-2009 (000\$)³⁶

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	-	1	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	-	-	-	-
Manufacturing	102 203	136 269	161 735	190 820	154 627
Mining and Quarrying	6 742	7 613	10 882	13 995	12 714
Agriculture and Forestry	1 448	5 531	21 088	33 024	41 294
Wholesale and Retail Trade	-	-	-	-	-

Table.6. Exports of Kütahya by Economic Activity 2005-2009 (000\$)³⁷

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	-	-	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	-	-	-	-
Manufacturing	79 492	78 680	87 923	112 838	99 923
Mining and Quarrying	13 040	11 158	1 292	1 522	1 852
Agriculture and Forestry	-	-	-	13	-
Wholesale and Retail Trade	-	-	-	-	-

Table.7. Exports of Uşak by Economic Activity 2005-2009 (000\$)³⁸

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	-	-	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	-	-	-	-
Manufacturing	89 825	105 840	108 679	108 576	91 666
Mining and Quarrying	154	279	362	554	724
Agriculture and Forestry	400	671	728	950	403
Wholesale and Retail Trade	4 213	4 463	5 508	6 680	4 111

In terms of imports the highest rates belong to Afyonkarahisar, Uşak and Kütahya respectively. Similar to exports, regional imports are at the average levels for mining, stone quarrying and retail trade sectors; but, lower in agriculture & forestry, manufacturing and wholesale and retail trade sectors. No imports are reported from fishing, electricity, gas, water supply and other social and personal services sectors.

³⁶ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

³⁷ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

³⁸ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

Table.8. Imports by Project Provinces 2007 -2012³⁹

Location	2007	2008	2009	2010	2011	2012
Afyonkarahisar	32 439	34 370	40 512	72 653	91 309	62 578
Kütahya	78 943	91 086	81 493	138 482	151 690	119 628
Uşak	80 808	80 668	85 611	129 745	184 480	194 214
Turkey	170 062 715	201 963 574	140 928 421	185 544 332	240 841 676	236 536 949

Table.9. Imports of Afyonkarahisar by Economic Activity 2005-2009 (000\$)⁴⁰

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	15	-	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	-	-	-	-
Manufacturing	17 106	24 729	24 192	27 460	33 030
Mining and Quarrying	27	54	69	178	69
Agriculture and Forestry	2 681	6 564	8 089	6 685	7 412
Wholesale and Retail Trade	106	110	90	47	-

Table.10. Imports of Kütahya by Economic Activity 2005-2009 (000\$)⁴¹

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	-	-	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	50	-	-	-
Manufacturing	46 874	47 957	55 620	67 488	61 019
Mining and Quarrying	17 449	16 885	20 926	22 588	18 899
Agriculture and Forestry	906	3 047	2 301	1 003	1 572
Wholesale and Retail Trade	5	106	96	7	3

Table.11. Imports of Uşak by Economic Activity 2005-2009 (000\$)⁴²

Economic Activity	2005	2006	2007	2008	2009
Fishing	-	-	-	-	-
Other Social and Personal Activities	-	-	-	-	-
Electricity, Gas and Water Supply	-	-	-	-	-
Other Business Activities	-	-	-	-	-
Manufacturing	52 947	54 239	69 559	71 577	65 574
Mining and Quarrying	1 223	1 987	1 079	691	722
Agriculture and Forestry	18 755	1 030	5 709	6 369	16 554
Wholesale and Retail Trade	2 801	772	4 461	2 031	2 761

³⁹ TURKSTAT, 2012. Imports by Provinces.⁴⁰ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.⁴¹ TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.⁴² TURKSTAT. Regional Indicators TR33 2010: Manisa, Afyonkarahisar, Kütahya, Uşak.

3.5. Business Statistics

According to the data obtained from regional chambers of trade and industry, there are 11.320 businesses registered throughout TR33 Region including the provinces of Afyonkarahisar, Kütahya and Uşak, as well as the province of Manisa. The highest number of businesses belong to Manisa with a share of 31%, followed by Afyonkarahisar, Uşak and Kütahya respectively.

Table.12. No. of Registered Enterprises to Chambers of Industry and Trade in TR33 Region

	Afyonkarahisar	Kütahya	Uşak	TR33 Region ⁴³
No. Of Enterprises	3.032	2.095	2.667	11.320
Share (%)	27	18	24	100

Below table provides detailed information on the opened-Liquidating-Closed companies in Aegean Region together with the project provinces for 2011-2012 period.

Table.13. Opened-Liquidating-Closed Companies in Aegean Region by Provinces⁴⁴

Province	2012 January - December (12 Months)									2011 January - December (12 Months)						
	Opened			Liquidation		Closed				Opened			Liquidation		Closed	
	Company	Cooperative	Real Person Com. Ent.	Company	Cooperative	Company	Cooperative	Real Person Com. Ent.	Company	Cooperative	Real Person Com. Ent.	Company	Cooperative	Company	Cooperative	Real Person Com. Ent.
Afyon	200	7	317	57	29	47	9	107	228	11	272	67	17	44	14	169
Aydın	246	17	1.304	150	41	121	54	952	461	19	1.464	175	63	93	51	928
Denizli	290	10	1.058	155	38	145	47	303	470	15	1.088	206	58	140	53	406
İzmir	2.212	40	2.733	1.269	130	1.094	100	833	3.277	47	2.208	1.634	128	943	116	1.312
Kütahya	116	10	372	26	17	29	15	117	149	11	385	53	24	19	28	196
Manisa	237	18	854	111	33	95	39	345	420	25	868	125	52	93	36	516
Muğla	326	17	1.270	251	30	182	15	414	582	15	1.157	301	48	160	22	526
Uşak	84	3	232	39	20	40	10	337	132	4	242	55	13	26	10	1.020
Aegean Reg.	3.711	122	8.140	2.058	338	1.753	289	3.408	5.719	147	7.684	2.616	403	1.518	330	5.073
Turkey	38.887	877	67.455	19.203	2.342	14.168	1.895	31.915	53.409	1.033	60.430	21.851	2.815	13.095	1.896	41.130

Enterprises located in the project provinces operate within a variety of sectors. Also, pioneering sectors for individual provinces differentiates significantly. Below table presents top five sectors for each province by the number of member enterprises to chambers of trade and industries.

⁴³ TR33 region includes the province of Manisa as well as Afyonkarahisar, Kütahya and Uşak provinces.

⁴⁴ TOBB, 2013. Online available at:

<http://www.tobb.org.tr/BilgiErisimMudurlugu/Sayfalar/KurulanKapananSirketistatistikleri.aspx>

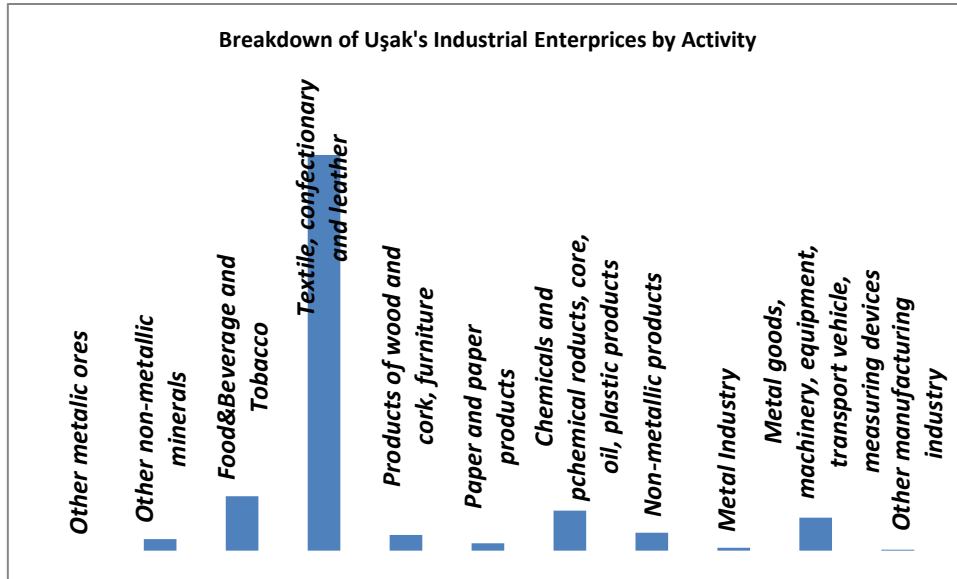
Table 14. Number of Registered Companies to CTIs by Sectors

Location	Sector	No. Of Members	Share (%)
Afyon	Contracting and Engineering Services	285	9,4
	Automotive, Transport Vehicles, Fuel Manufacturing and Sale	224	7,39
	Wholesale and Retail Food Manufacturing and Sale	203	6,7
	Factories for Marbles and Naturel Stones	195	6,43
	Financial Services	181	5,97
	<i>Total</i>	<i>3.032</i>	<i>100</i>
Kütahya	Automotive, Transport Vehicles, Fuel	269	12,84
	Food Trade	240	11,46
	Engineering and Technical Services	183	8,74
	Finance, Insurance, Real Estate and Jewelry	169	8,07
	Construction & Living	153	7,3
	<i>Total</i>	<i>2.095</i>	<i>100</i>
Uşak	Construction	281	10,54
	Food Sale & Restaurants	253	9,49
	Manufacturing of Food, Agriculture, Husbandry, Milk and Dairy Products	250	9,37
	Yarn and Fabrics	249	9,34
	Manufacturing of Construction Materials and Sale	227	8,51
	<i>Total</i>	<i>2.667</i>	<i>100</i>

From a general point of view, the number of enterprises in Afyonkarahisar, except the ones in food, wood, non-metallic mineral products and metal products sectors, are under Turkey averages. As of Kütahya, the province's industry is mainly based on mining and manufacturing of non-metallic mineral products.

There are 433 enterprises in knitted textile confection and leather industry sectors in Uşak which presents 68.2% of all enterprises in Uşak and 64.1% of relevant enterprises in TR33 Region including Afyonkarahisar, Manisa, Kütahya and Uşak. The total number of textile enterprises in TR33 provinces is 675 and the sector constitutes approximately 19% of the total TR33 industry. In this state, it is apparent that Uşak has a leading position in terms of textile sector within its region. Another important sector in Uşak can be given as food products, beverages and tobacco products. However, the number of relevant enterprises in Uşak only has a share of 9.4% within the province and 5% within TR33 Region. The numbers of other industrial enterprises in Uşak has lower shares than 7% within TR33 Region.⁴⁵

⁴⁵ Uşak Chamber of Trade and Industry, 2012. Industry Inventory of Uşak 2012.



Source : Uşak Chamber of Industry and Trade

3.6. Education

In terms of schooling rates, Aegean Region in general including the project provinces is considered to have advanced levels compared to many regions of Turkey. The current status of the project provinces will be given in this part by individual tables with detailed information on different levels and types of education.

Table.15. Schooling Rates / Pre-School Education and Primary Schools (2011-2012)⁴⁶

	Age	Pre-School Education			Rate	Primary School		
		T	M	F		T	M	F
Turkey	3-5	30,87	31,23	30,49	gross	108,42	108,21	108,65
	4-5	44,04	44,56	43,5	net	98,67	98,77	98,56
	5	65,69	66,2	65,16	-	-	-	-
Afyonkarahisar	3-5	31,7	31,65	31,76	gross	105,14	106,17	104,06
	4-5	46,03	45,97	46,09	net	99,03	99,08	98,98
	5	75,02	74,38	75,68	-	-	-	-
Kütahya	3-5	42,66	42,33	43,01	gross	105,83	105,7	105,97
	4-5	60,92	60,43	61,44	net	99,19	99,24	99,13
	5	97,72	97,8	97,64	-	-	-	-
Uşak	3-5	37,7	37,83	37,56	gross	106,6	106,61	106,58
	4-5	54,82	54,98	54,65	net	98,92	98,87	98,97
	5	90,21	90,14	90,28	-	-	-	-

⁴⁶ Zafer Development Agency, 2012. TR33 Region Entrepreneurship and Employment Strategy, p.26.

It can be seen from the above table that within the three project provinces the rate of pre-school education for all age groups is above the Turkey average.

Table.16. Gross Schooling Rates / Secondary Schools (2000-2012)⁴⁷

Location	Educational Year	Secondary Schools (All)			General Secondary Schools			Vocational & Technical Secondary Schools		
		T	M	F	T	M	F	T	M	F
Turkey	2000 -2001	50,05	56,61	43,12	31,14	33,23	28,93	18,93	23,38	14,2
	2011 -2012	92,56	95,68	89,26	51,88	52,08	51,67	40,68	43,6	37,59
TR33	2000 -2001	45,21	54,32	36,05	26,11	27,79	24,6	19,1	26,53	11,45
	2011 -2012	90,2	92,33	88	41,01	37,73	44,46	49,2	54,61	43,5
Afyon	2000 -2001	35,74	45,02	26,04	20,49	22,63	18,26	15,25	22,4	7,78
	2011 -2012	79,53	84,54	74,29	31,86	31,49	32,25	47,67	53,06	42,04
Kütahya	2000 -2001	46,89	61,58	31,12	22,92	26,88	18,66	23,98	34,7	12,46
	2011 -2012	105,77	112,49	98,97	45,84	45,33	46,38	59,93	67,16	52,34
Uşak	2000 -2001	54,08	59,34	48,6	36,81	35,92	37,73	17,27	23,43	10,87
	2011 -2012	94,98	91,43	98,86	53,73	46,81	61,28	41,26	44,63	37,58

For the period 2000-2012 significant success has been achieved in terms of increasing the enrollment ratio of vocational and technical secondary school students and participation of girls to these schools in project provinces. Within the given period, while the share of vocational and technical secondary school students increased from 18,93% to 40,68% throughout the country; in TR33 region including Afyon, Manisa, Kütahya and Uşak, it increased from 19,10% to 49,20% . Kütahya has a leading share with 59,93% students attending vocational and technical secondary schools. In Afyonkarahisar, this progress is also apparent for girls since the enrollment rate to vocational and technical secondary schools was 7,78% in 2000 and it increased to 49,20% for the 2011-2012 educational year.

In 2001-2012 educational year, 83,93% of primary school graduates enrolled to secondary schools. While 65,09% of new secondary school students attended to general secondary schools, 34,91% participated to vocational and technical secondary schools. In 2011-2012 educational year, the enrollment rate to secondary schools slightly increased to 84,71%, however distribution of general and vocational and technical schools almost evened out with 49,46% of freshers attending general secondary schools and 50,54% attending vocational and technical secondary schools. These rates present an important change in the perception of students and their guardians towards vocational and technical schools.

⁴⁷ Zafer Development Agency, 2012. TR33 Region Entrepreneurship and Employment Strategy, p.25.

Table.17. Number of schools/ units, teachers, students and graduates by type of school and educational year

Type of School	Educational Year	School/Unit	Teachers	Students	Graduate
General Secondary Education	2004/2005	2.939	93.209	1.937.055	379.511
	2005/2006	3.406	102.581	2.075.617	410.109
	2006/2007	3.690	103.389	2.142.218	465.809
	2007/2008	3.830	106.270	1.980.452	213.506
	2008/2009	4.053	107.789	2.271.900	366.444
	2009/2010	4.067	111.896	2.420.691	399.478
	2010/2011	4.102	118.378	2.670.623	392.064
Vocational and Technical Secondary Education	2004/2005	3.877	74.405	1.102.394	211.323
	2005/2006	4.029	82.736	1.182.637	235.219
	2006/2007	4.244	84.276	1.244.499	263.726
	2007/2008	4.450	84.771	1.264.870	108.235
	2008/2009	4.622	88.924	1.565.264	182.450
	2009/2010	4.846	94.966	1.819.448	263.416
	2010/2011	5.179	104.327	2.072.487	314.448
Faculty and Higher Education Schools	2004/2005	5.501	113.098	2.090.220	-
	2004/2005	1.283	82.096	1.969.086	316.128
	2005/2006	1.306	84.785	2.181.217	340.499
	2006/2007	1.339	89.329	2.291.762	378.818
	2007/2008	1.387	98.766	2.372.136	409.023
	2008/2009	1.495	100.504	2.757.828	447.132
	2009/2010	1.617	105.427	3.322.559	520.614
2010/2011	1.756	111.495	3.626.642	-	
2011/2012	N/A	N/A	N/A	N/A	N/A

Table.18. The Number Vocational and Technical Secondary Education Schools, Teachers, Divisions, Students and Graduates by educational year⁴⁸

Educational Year	School	Teacher			Division	Student			Graduate		
		Total	Male	Female		Total	Male	Female	Total	Male	Female
2003/2004	4 204	68 231	40 385	27 846	39 330	1 050 394	656 135	394 259	232 268	140 537	91 731
2004/2005	3 877	74 405	46 938	27 467	40 700	1 102 394	687 660	414 734	211 323	124 659	86 664
2005/2006	4 029	82 736	50 554	32 182	41 111	1 182 637	732 282	450 355	235 219	141 751	93 468
2006/2007	4 244	84 276	51 149	33 127	43 033	1 244 499	760 771	483 728	263 726	161 958	101 768
2007/2008	4 450	84 771	51 027	33 744	43 226	1 264 870	744 631	520 239	108 235	66 528	41 707
2008/2009	4 622	88 924	53 229	35 695	53 971	1 565 264	893 697	671 567	182 450	95 637	86 813
2009/2010	4 846	94 966	56 259	38 707	64 240	1 819 448	1 034 443	785 005	263 416	148 233	115 183
2010/2011	5 179	104 327	61 053	43 274	68 848	2 072 487	1 177 725	894 762	314 448	172 514	141 934
2011/2012	5 501	113 098	65 599	47 499	71 095	2 090 220	1 151 197	939 023			

⁴⁸ Republic of Turkey Ministry of Education, 2012. National Education Statistics: Formal Education 2011-2012.

Table.19. Number of Students per School, Division, Teacher and Classroom by Level of Education - The Educational Year 2011/2012⁴⁹

	Primary Education				Secondary Education							
	School	Division	Teacher	Classroom	General Secondary Education				Vocational and Technical Secondary Education			
					School	Division	Teacher	Classroom	School	Division	Teacher	Classroom
Turkey	323	25	20	30	476	26	15	28	333	26	16	35
Aegean Region	305	23	17	24	403	23	14	24	301	25	15	34
TR31 (İzmir)	441	25	17	30	479	23	14	27	356	25	16	41
TR32 (Aydın-Denizli-Muğla)	280	22	16	22	399	23	13	22	296	23	14	32
TR33 (Manisa-Afyon-Kütahya-Uşak)	237	22	17	22	326	23	13	22	260	26	15	29
Afyon	219	22	18	21	295	22	13	20	248	23	16	28
Kütahya	213	21	16	20	274	23	13	20	235	23	15	28
Uşak	235	22	15	20	386	23	14	23	293	22	16	27

Table.20. The Number of Graduates by settlement place and level of education, end of educational year 2010/2011⁵⁰

		Primary Education			Secondary Education					
		Total	Male	Female	General Secondary Education			Vocational and Technical Secondary Education		
					Total	Male	Female	Total	Male	Female
Turkey	Total	1 226 473	643 872	582 601	392 064	188 269	203 795	314 448	172 514	141 934
	City	989 232	517 684	471 548	376 153	180 196	195 957	301 318	164 474	136 844
	Village	237 241	126 188	111 053	15 911	8 073	7 838	13 130	8 040	5 090
Afyonkarahisar	Total	11 847	6 097	5 750	2 443	1 193	1 250	3 735	2 114	1 621
	City	7 102	3 678	3 424	2 414	1 180	1 234	3 534	1 985	1 549
	Village	4 745	2 419	2 326	29	13	16	201	129	72
Kütahya	Total	8 119	4 155	3 964	2 370	1 183	1 187	3 149	1 862	1 287
	City	5 990	3 079	2 911	2 321	1 153	1 168	3 081	1 810	1 271
	Village	2 129	1 076	1 053	49	30	19	68	52	16
Uşak	Total	5 256	2 791	2 465	1 828	812	1 016	1 455	815	640
	City	3 985	2 094	1 891	1 814	808	1 006	1 435	805	630
	Village	1 271	697	574	14	4	10	20	10	10

Table.21. Number of new entrants by settlement place and level of education, Beginning of the educational year 2011/' 12⁵¹

		Primary Education			Secondary Education					
		Total	Male	Female	General Secondary Education			Vocational and Technical Secondary Education		
					Total	Male	Female	Total	Male	Female
Turkey	Total	1 285 550	663 219	622 331	513 896	260 515	253 381	525 069	290 779	234 290
	City	992 321	512 569	479 752	490 144	248 228	241 916	500 771	275 712	225 059
	Village	293 229	150 650	142 579	23 752	12 287	11 465	24 298	15 067	9 231
Afyonkarahisar	Total	11 717	6 050	5 667	3 036	1 401	1 635	6 630	3 969	2 661
	City	6 503	3 349	3 154	2 949	1 360	1 589	6 335	3 762	2 573
	Village	5 214	2 701	2 513	87	41	46	295	207	88
Kütahya	Total	7 652	3 987	3 665	2 994	1 503	1 491	4 777	2 631	2 146
	City	5 631	2 911	2 720	2 932	1 469	1 463	4 685	2 569	2 116
	Village	2 021	1 076	945	62	34	28	92	62	30
Uşak	Total	5 030	2 628	2 402	2 436	1 080	1 356	2 471	1 426	1 045
	City	3 798	1 993	1 805	2 436	1 080	1 356	2 445	1 409	1 036
	Village	1 232	635	597	-	-	-	26	17	9

⁴⁹ Republic of Turkey Ministry of Education, 2012. National Education Statistics: Formal Education 2011-2012.

⁵⁰ Republic of Turkey Ministry of Education, 2012. National Education Statistics: Formal Education 2011-2012.

⁵¹ Republic of Turkey Ministry of Education, 2012. National Education Statistics: Formal Education 2011-2012.

There are three universities in three project provinces namely Afyon Kocatepe University (1992), Kütahya Dumlupınar University (1992) and Uşak University (2006). Both Universities provide higher education at undergraduate, graduate and post-graduate level including higher schools, and vocational higher schools. Table X.X presents detailed information on academic institutions and student numbers for Turkey and universities in the project provinces.

Table.22.Turkey - Number of schools/ units, teachers, students and graduates by type of school and educational year⁵²

Type of School	Educational Year	School/Unit	Teacher	Student	Graduate
General Secondary Education	2004/2005	2.939	93.209	1.937.055	379.511
	2005/2006	3.406	102.581	2.075.617	410.109
	2006/2007	3.690	103.389	2.142.218	465.809
	2007/2008	3.830	106.270	1.980.452	213.506
	2008/2009	4.053	107.789	2.271.900	366.444
	2009/2010	4.067	111.896	2.420.691	399.478
	2010/2011	4.102	118.378	2.670.623	392.064
	2011/2012	4.172	122.716	2.666.066	
Vocational and Technical Secondary Education	2004/2005	3.877	74.405	1.102.394	211.323
	2005/2006	4.029	82.736	1.182.637	235.219
	2006/2007	4.244	84.276	1.244.499	263.726
	2007/2008	4.450	84.771	1.264.870	108.235
	2008/2009	4.622	88.924	1.565.264	182.450
	2009/2010	4.846	94.966	1.819.448	263.416
	2010/2011	5.179	104.327	2.072.487	314.448
	2011/2012	5.501	113.098	2.090.220	-
Faculty and Higher Education School	2004/2005	1.283	82.096	1.969.086	316.128
	2005/2006	1.306	84.785	2.181.217	340.499
	2006/2007	1.339	89.329	2.291.762	378.818
	2007/2008	1.387	98.766	2.372.136	409.023
	2008/2009	1.495	100.504	2.757.828	447.132
	2009/2010	1.617	105.427	3.322.559	520.614
	2010/2011	1.756	111.495	3.626.642	
	2011/2012	N/A	N/A	N/A	N/A

In terms of Higher education, there is one university in each project province: Afyonkocatepe University, Kütahya Dumlupınar University and Uşak University. Established in 2006, Uşak University is newer in the region. Both the universities of Afyonkarahisar and Uşak were established in 1992.

⁵² Republic of Turkey Ministry of Education, 2012. National Education Statistics: Formal Education 2011-2012.

Table.23.The Number of Vocational Training School & Undergraduate Students⁵³

	Institutions		New Admissions			Total Number of Students			2011-2012 Graduates		
	Name	Number	T	M	F	T	M	F	T	M	F
Total For Turkey	Total	1914	813580	391638	421942	4112687	1873699	2238988	496794	225819	270975
	<i>Faculty</i>	953	518316	271263	247053	3312803	1566078	1746725	310521	146169	164352
	<i>Higher Schools (4 years)</i>	237	31440	15555	15885	115766	55179	60587	15574	8331	7243
	<i>Vocational Training Schools (2 years)</i>	724	263824	104820	159004	684118	252442	431676	170699	71319	99380
Afyon Kocatepe University	Total	28	9863	4538	5325	31771	14116	17655	6576	2988	3588
	<i>Faculty</i>	8	3442	1851	1591	15212	7654	7558	2036	933	1103
	<i>Higher Schools (4 years)</i>	5	680	347	333	2246	1091	1155	132	73	59
	<i>Vocational Training Schools (2 years)</i>	15	5741	2340	3401	14313	5371	8942	4408	1982	2426
Kütahya Dumlupınar University	Total	19	11712	5528	6184	37337	17430	19907	7160	3581	3579
	<i>Faculty</i>	6	4502	2420	2082	18852	9689	9163	2652	1349	1303
	<i>Higher Schools (4 years)</i>	3	950	508	442	3350	1791	1559	434	275	159
	<i>Vocational Training Schools (2 years)</i>	10	6260	2600	3660	15135	5950	9185	4074	1957	2117
Uşak University	Total	13	3011	1648	1363	10477	5501	4976	2120	1077	1043
	<i>Faculty</i>	5	1784	1073	711	7047	3932	3115	1014	542	472
	<i>Higher Schools (4 years)</i>	1	90	71	19	345	253	92	36	35	1
	<i>Vocational Training Schools (2 years)</i>	7	1137	504	633	3085	1316	1769	1070	500	570

There are 15 Vocational Higher Schools in Afyon Kocatepe University which major on providing education and training for specific professions and two-year degrees. Students also have the opportunity to attend 4-year degrees provided that all requirements are fulfilled. These vocational higher schools are: Atatürk Health Services VHS, Afyon VHS, Başmakçı VHS, Bayat VHS, Bolvadin VHS, Çay VHS, Dazkırı VHS, İsehisar VHS, Sultandağı VHS, Dinar VHS, Emirdağ VHS, Sandıklı VHS, Şuhut VHS, Sinanpaşa VHS and Distance Education VHS. The list of educational programs in these schools are given in the below table.

⁵³ OSYM, 2012. 2011-2012 Academic Year Statistics. Online available at: <http://www.osym.gov.tr/dosya/1-60426/h/5onlisanslisansduzeyogrencisay.pdf>

Vocational High Schools and Programs of Afyon Kocatepe University⁵⁴

<p>Afyon VHS Electricity Construction Tech. Food Tech. Computer Programming Furniture and Decoration Architectural Restoration Machinery Automotive Tech. Meat and Products Tech. Textile Tech. Biomedical Devices Tech. Radio and TV Tech. Accounting and Taxation Applications Tourism and Hotel Management Business Management Office Management and Administrative Assistance Local Governments Management Cookery Child Development</p> <p>Health Services VHS Physiotherapy Medical Imaging Techniques Medical Lab. Techniques Health Institutions Management Electro neurophysiology Orthopedic Prosthesis Orthesis Biomedical Devices Tech. Geriatric Care First Aid and Emergency Aid</p> <p>Bayat VHS Business Administration Foreign Trade Human Resources</p>	<p>Başmakçı MYO Foreign Trade Finance and Insurance Child Care Private Security and Safeguarding laboratory Assistant and Veterinary Health</p> <p>Bolvadin VHS Computer Programming Banking and Insurance Office Management and Administrative Assistance Foreign Trade Gas and Installation Technology Electronics Food Tech Air Conditioning and Refrigeration Tech. Construction Tech Business Administration Machinery Mechatronics Furniture and Decoration Accounting and Taxation Applications</p> <p>Çay VHS Child Development Electronics Air Conditioning and Refrigeration Tech. Chemicals Tech. Automotive Tech. Accounting and Taxation Applications Business Administration</p>	<p>Dinar VHS Business Administration Accounting and Taxation Applications Marketing Tourism and Hotel Management Fashion Design Civil Aviation and Cabin Services Carpet and Kilim Computer Programming Electronics Tech.</p> <p>Dazkırı VHS Accounting and Taxation Applications Electricity Concrete Tech. Electronic Communications Tech.</p> <p>Emirdağ VHS Computer Tech. Finance Banking and Insurance Foreign Trade Construction Business Administration Architecture and City Planning</p> <p>İscehisar VHS Motor Vehicles and Transportation Tech. Jewelry and Jewelry Design Machinery and Metal Tech.</p> <p>Sandıklı VHS Tourism and Hotel Management Office Management and Administrative Assistance Accounting and Taxation Applications Map and Cadastral Business Administration Computer Programming Tourism Services Public Relations and Publicity</p>	<p>Sinanpaşa VHS Accounting and Taxation Applications Business Administration Computer Programming</p> <p>Sultandağı VHS Business Administration Banking and Insurance Food Tech. Medicinal and Aromatic Plants Bus Driver Retail Sales and Store Management Public Relations and Publicity Office Management and Administrative Assistance</p> <p>Şuhut VHS Business Administration Marketing Accounting and Taxation Applications Food Tech. Distance Education VHS Computer Programming Information Management Computer Operating Geographical Information Systems</p>
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Afyon Kocatepe University declares that it gives priority to increase the cooperation between regional sectors and the university. To this end, the university modernizes and improves vocational higher school programs each year in order support the development of regional economy, industry

⁵⁴ Afyon Kocatepe University, 2013. Online available at: <http://www.aku.edu.tr/anasayfa/Default.aspx>

and national and international competitiveness⁵⁵. Moreover, there are 20 Application and Research Centers in Afyon Kocatepe University that are established in order to support leading economic sectors in the region. These centers major on several areas which are included but not limited to animal husbandry, food control, health, animal experiments, veterinary, solar & wind energy, marble and natural stone technology, geothermal mineral water and mineral resources, career consulting, technology and life-long learning.

There are 14 vocational higher schools in Kütahya Dumlupınar University: Kütahya VHS, Simav VHS, Şaphane VHS, Gediz VHS, Altıntaş VHS, Tavşanlı VHS, Emet VHS, Hisarcık VHS, Domaniç VHS, Pazarlar VHS, Aslanpa VHS, Dumlupınar VHS, Çavdarhisar VHS. No new student admissions were made to the last three VHS' in 2011.

Vocational High Schools and Programs of Kütahya Dumlupınar University⁵⁶

Kütahya Technical Sciences VHS	Business Administration Textile Tech. Computer Programming Clothing Production Tech. Banking and Insurance Medicinal and Aromatic Plants Worker Health and Job Security Accounting and Taxation Applications Medical Documentation and Secretaryship	Domaniç VHS Business Administration Accounting and Taxation Applications Logistics Information Management Office Management and Administrative Assistance	Simav VHS Electronics Electronic Tech. Electronic Communication Tech. Computer Programming Organic Agriculture Machinery Control and Automation Mechatronics Furniture and Decoration Banking and Insurance Accounting and Taxation Applications Business Administration Marketing Logistics Human Resources Local Governments
Computer Programming Computer Operating Fine Working of Tiles Traditional Handcraft Jewelry and Jewelry Design Ceramics, Glass and Tiling Electricity Electronic Tech. Control and Automation Mechatronics Construction Tech. Natural Building Stones Chemistry Tech. Machinery Furniture and Decoration Architectural Restoration Graphic Design	Tavşanlı VHS Accounting Computer Tech. And Programming Import - Export Mapping and Cadastral Machinery Automotive Industrial Automation Office Management and Secretaryship Natural Gas Heating & Plumbing Tech. Logistics Internet and Network Tech.	Emet VHS Child Development Foreign Trade Business Administration Chemistry Securities and Capital Market Accounting and Taxation Applications Tourism and Hotel Management	Şaphane VHS Business Administration Local Governments Logistics Banking and Insurance Securities and Capital Market Office Management and Administrative Assistance Accounting and Taxation Applications
Social Sciences VHS Office Management and Administrative Assistance Foreign Trade Banking and Insurance Accounting and Taxation Applications Tourism and Hotel Management Marketing Tourism and Travel Services	Altıntaş VHS Business Administration	Hisarcık VHS Marketing Accounting and Taxation Applications Business Administration Logistics Real Estate and Management Foreign Trade Public Relations Human Resources	

⁵⁵ Afyon Kocatepe University, 2012. Administrative Activity and Evaluation Report 2011. Online available at: <http://www.aku.edu.tr/AKU/DosyaYonetimi/STRATEJI/1-DUYURULAR/1-AK%C3%9C.%202011%20Y%C4%B1%C4%B1%20Faaliyet%20%20ve%20De%C4%9Ferlendirme%20Raporu.pdf>

⁵⁶ Kütahya Dumlupınar University, 2013. Online available at: <http://www4.dpu.edu.tr/>

Real Estate and Management	Logistics	Local Governments
Bus Captain	Accounting and Taxation Applications	Pazarlar VHS
Business Administration	Medicinal and Aromatic Plants	Food Tech.
Gediz VHS	Food Tech.	Air-Conditioning and Refrigeration Tech.
Logistics	Food Quality Control and Analysis	Machinery, Drawing and Construction
Marketing	Milk and Dairy Products Tech.	Gas and Installation Tech.
Mechatronics	Public Relations	Alternative Energy Resources
Fashion Design		Food Control and Analysis

There are also 14 Application and Research Centers in Dumlupınar University, two of which particularly focuses on improving the cooperation between universities, public sector and industry. Dumlupınar University Continuing Education Application and Research Center provides education and training to people from different ages; and, organizes social events in order to strengthen the links between public sector, private sector, international institutions and the university. The center also provides consulting services, seminars, courses, fairs and similar events. Advanced Technology Research, Development and Application Center also contributes to these efforts and aims to create an environment where scientific researches, analysis and education is open to private industries and public institutions in facilities with modern devices.

Vocational High Schools and Programs of Uşak University⁵⁷

Distance Education VHS Computer Programming Business Administration	Karahallı VHS Office Management and Administrative Assistance Logistics Computer Programming Foreign Trade	Sivaslı VHS Business Administration Marketing Organic Agriculture Gardening Agriculture
Uşak VHS Electronics Tech. Electricity Radio and TV Local Governments Business Administration Accounting and Taxation Applications Machinery Computer Programming Textile Tech. Gas and Installations Tech. Automotive Tech.	Eşme VHS Banking and Insurance Office Management and Administrative Assistance Traditional Handcrafts Business Administration Logistics Accounting and Taxation Applications	Health Services VHS Dialysis Geriatric Care First Aid and Emergency Aid Medical Lab. Techniques Medical Imaging Techniques Medical Documentation and Secretaryship
Banaz VHS Business Administration Marketing Chemistry Tech. Furniture and Decoration Tourism and Hotel Management	Ulubey VHS Fashion Design Child Development Clothing Production Tech. Business Administration Office Management and Administrative Assistance Banking and Insurance Tourism and Hotel	Justice VHS

⁵⁷ Uşak University, 2013. Online available at: http://www.usak.edu.tr/index.php?sayfa=my_okullar.php

3.7. Regional Employment Data & Employment Trends

3.7.1. Workforce

3.7.1.1. Turkey's Workforce

According to the 2011 numbers, Turkey's workforce was calculated as 26.725.000 people. The working population is taken as the population aged 15 and above. While 24.110.000 of the workforce was employed, 2.615.000 was identified as unemployed, constituting an unemployment rate of 9,8%. During 2000-2011 period, the most significant annual increase in the number of employed people was observed in 2011, with 1.516.000 new recruitments. However, it's partly related with the recovery process of the 2008-2009 economic recession, when the highest unemployment rate for the given 11-years period was identified at 14% in 2009.

Table.24. Turkey's Workforce 2000-2011

Year	Non-institutional Civilian Population	15 + Population	Labour Force	Employed	Unemployed	Labour Force Participation Rate (%)	Unemployment Rate (%)	Unemployment Rate (%) (Non-Agricultural)	Employment Rate (%)	Population not-included to Workforce
2000	66.187	46.211	23.078	21.581	1.497	49,9	6,5	9,3	46,7	23.133
2001	67.296	47.158	23.491	21.524	1.967	49,8	8,4	12,4	45,6	23.667
2002	68.393	48.041	23.818	21.354	2.464	49,6	10,3	14,5	44,4	24.223
2003	69.479	48.912	23.640	21.147	2.493	48,3	10,5	13,8	43,2	25.272
2004	66.379	47.544	22.016	19.632	2.385	46,3	10,8	14,2	41,3	25.527
2005	67.227	48.359	22.455	20.067	2.388	46,4	10,6	13,5	41,5	25.905
2006	68.066	49.174	22.751	20.423	2.328	46,3	10,2	12,7	41,5	26.423
2007	68.901	49.994	23.114	20.738	2.376	46,2	10,3	12,6	41,5	26.879
2008	69.724	50.772	23.805	21.194	2.611	46,9	11	13,6	41,7	26.967
2009	70.542	51.686	24.748	21.277	3.471	47,9	14	17,4	41,2	26.938
2010	71.343	52.541	25.641	22.594	3.046	48,8	11,9	14,8	43	26.901
2011	72.376	53.593	26.725	24.110	2.615	49,9	9,8	12,4	45	26.867

In 2011, total unemployment rate has declined to 9,8% and both male and female population benefited better economic environment after the recession period. When 2011 numbers are analyzed in more detail, it can be seen that labor force participation rate for women are significantly lower than men. This trend is not peculiar to 2011, and it is generally considered as a structural issue in Turkish labor market. It must be noted that this gap has narrowed 4,2% since 2005 and it's getting less prominent although not yet at desired levels. Upward employment trends have been also observed in young workforce of Turkey aged at 15-24. Unemployment rate for this age group was 18,4% in 2011, the lowest level since 2002. Below table presents 2011 numbers in more detail.

Table.25. Turkey's Workforce 2011

Year	Non-institutional Civilian Population (000)	15 + Population (000)	Labour Force (000)	Employed (000)	Unemployed (000)	Labour Force Participation Rate (%)	Unemployment Rate (%)	Unemployment Rate (%) (Non-Agricultural)	Employment Rate (%)	Population not included to Workforce (000)
2011	Turkey Total									
Total	72376	53593	26725	24110	2615	49,9	9,8	12,4	45	26867
Male	35909	26320	18867	17137	1730	71,7	9,2	10,7	65,1	7453
Female	36467	27273	7859	6973	885	28,8	11,3	17,7	25,6	19414
	Province/ District Centers Workforce									
Total	49535	36973	17594	15508	2087	47,6	11,9	12,3	41,9	19378
Male	24660	18236	12939	11623	1316	71	10,2	10,4	63,7	5297
Female	24875	18736	4655	3885	770	24,8	16,5	17,7	20,7	14081
	Towns/Villages Workforce									
Total	22841	16620	9131	8603	528	54,9	5,8	12,8	51,8	7489
Male	11250	8084	5928	5514	413	73,3	7	11,9	68,2	2156
Female	11591	8536	3203	3088	115	37,5	3,6	17,6	36,2	5333
	Young Workforce									
Total		11534	4529	3697	832	39,3	18,4	22,1	32,1	7005
Female		5893	1578	1251	327	26,8	20,7	28,1	21,2	4316
Male		5641	2951	2446	505	52,3	17,1	19,4	43,4	2690
Province/ District Centers		7998	3003	2366	638	37,6	21,2	21,8	29,6	4994
Towns/ Villages		3536	1526	1331	194	43,1	12,7	23,2	37,6	2011

The leading sector for providing jobs in Turkey was the services sector in 2011 followed by agriculture, industry and construction respectively. Since 2000 the most significant change has occurred in the agriculture and services sectors. In 2000, employment in agriculture had 36% share which declined to 25,5% in 2011. Furthermore, employment in the services sector has increased from 40% in 2000 to 48,1% in 2011.

Table.26. Sectoral Distribution of Turkey's Workforce, 2011

	Total	Agriculture		Industry		Construction		Services	
		No	%	No	%	No	%	No	%
Male	17.137	3.119	18,2	3.701	21,6	1.622	9,5	8.617	50,3
Female	6.973	3.024	43,4	1.003	14,4	54	0,9	2.969	42,6
Total	24.110	6.143	25,5	4.704	19,5	1.676	7	11.586	48,1

Sectoral Distribution of Turkey's Workforce 2011

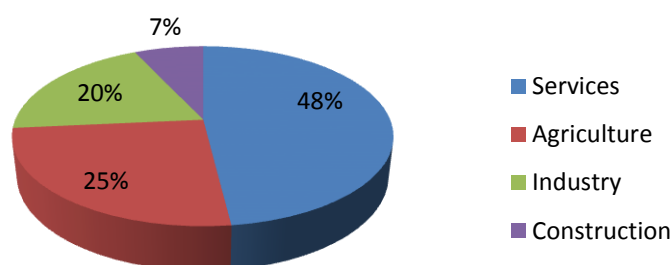


Table.27. Turkey's Workforce by Educational Background, 2011

	Non-Literate			Less than High School Education			General High School			Vocational & Technical High School			Higher Education		
	Workforce	Employed	Unemployed	Workforce	Employed	Unemployed	Workforce	Employed	Unemployed	Workforce	Employed	Unemployed	Workforce	Employed	Unemployed
Total	1203	1147	56	15681	14224	1457	2783	2432	351	2582	2297	285	4476	4009	467
M	364	325	39	11621	10511	1110	2057	1862	196	2007	1837	170	2818	2602	215
F	839	823	17	4060	3713	347	726	571	155	575	460	115	1658	1406	252
M	30,30%	28,30%	69,60%	74,10%	73,90%	76,20%	73,90%	76,60%	55,80%	77,70%	80,00%	59,60%	63,00%	64,90%	46,00%
F	69,70%	71,80%	30,40%	25,90%	26,10%	23,80%	26,10%	23,50%	44,20%	22,30%	20,00%	40,40%	37,00%	35,10%	54,00%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

According to the educational backgrounds of the workforce, it is seen that the highest unemployment rate belongs to high school graduates (12,6%). Within vocational and technical high school graduates the workforce participation rate is 65,5% and unemployment rate is 12,6%, followed by vocational and technical high schools (11%) and university/faculty graduates (10,4).

Vocational and technical high school graduates constituted 10,9% of 2.615.000 unemployed people in 2001, and they have the lowest share when non-literate group and people with no school education are excluded. Among 24.110.000 employed people in 2011, their share was 9,5%. There is a significant difference for employed women and men who graduated from VTHS' since women only has 20% share.

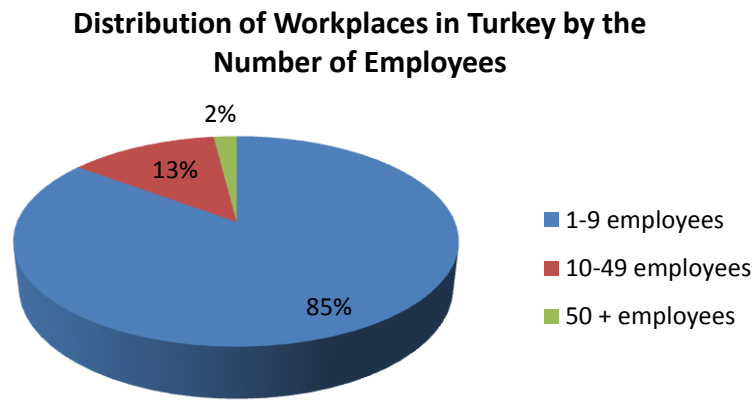
Table.28. Comparative Unemployment Rates of VET and General High Schools

Period	Unemployment Rate % (Vocational High Schools)	Unemployment Rate % (General High Schools)
November 2012	10,2	12,7
October 2012	10,4	12,4
September 2012	10,6	11,7
August 2012	9,8	10,9
July 2012	9,2	10,9
June 2012	8,3	10,6
May 2012	9,1	11,4
April 2012	9,6	11,4
March 2012	11,1	12,3

February 2012	11,5	12,1
January 2012	11,4	11,8
December 2011	10,9	11,6
November 2011	10,1	11,3

3.7.1.2. Workplaces in Turkey

According to Social Security Institution (SGK) of Turkey there were 1.427.590 operative workplaces in Turkey as of January 2012. It's noteworthy that the number of workplaces with 1 employee corresponds to 35,5% of total workplace number which reflects an inverse relationship between the number of workplaces in Turkey and company sizes.



In terms of the number workplaces by economic activity, retail trade workplaces rank the first with 17,5% share, followed by road and pipeline transportation (7,6%) and building construction workplaces (appr.7%).

3.7.2. Project Provinces

Afyonkarahisar

According to the Afyonkarahisar Provincial Employment and Vocational Education Committee Report⁵⁸ of 2012, the participation rate of the workforce is not very high in the province which is strongly related to the vast majority of people engaged with agriculture and animal husbandry. Also, unemployment rate in Afyon is considerably lower than Turkey average (9,8% in 2011), as in 2009 and 2010.

⁵⁸ İŞKUR, 2012. Afyonkarahisar Provincial Employment and Vocational Education Committee Report.

Table. 29. Afyonkarahisar in Employment Numbers

	Workforce Participation Rate (%)	Unemployment Rate (%)	Employment Rate (%)
Afyonkarahisar	52,7	4,7	50,2

SGK data reveals that as of January 2012, there are 10.029 work places in Afyon (as part of 4a workplaces)⁵⁹.

İŞKUR stated that the number of registered workforce in Afyon was 27.206 people in 2012, while 18.064 of them were registered as unemployed. 5685 open jobs were announced (more than 80% in private sector) and 4481 people were recruited during the year.

Table.30. İSKUR Main Employment Data on Afyonkarahisar ,2012

	Female	Male	Total
Registered Workforce	7739	19967	27706
Registered Unemployed	5704	12360	18064
Application Unemployed	4974	13139	18113
Other			
Open Jobs			5685
Public Sector			1016
Private Sector			4669
Work Placement	1140	3341	4481
Public Sector	135	793	928
Private Sector	1005	2548	3553

Table.31. İŞKUR Data on Unemployed People by Age Group and Educational Background, 2012⁶⁰

	Age Group							
	15-19	20-24	25-29	30-34	35-39	40-44	45-64	65+
Total	728	4413	3980	3254	2067	1675	1901	46
Male	486	2996	2705	2247	1375	1167	1359	25
Female	242	1417	1275	1007	692	508	542	21
	Education							
	Illiterate	Literate	Primary Ed.	High School	Two-Year Higher Education	University	Master	Phd
Total	312	151	8414	6140	1762	1243	40	2
Male	137	81	6148	4297	988	688	20	1
Female	175	70	2266	1843	774	555	20	1

⁵⁹ İSKUR, 2011. Analysis of Turkey's Workforce Market: 2011-2nd Period.

⁶⁰ İSKUR 2012, Afyonkarahisar Provincial Employment and Vocational Education Committee Report.

Among the people who applied to ISKUR and registered as unemployed, the highest share belong people aged 20-24. Considering all age groups, people who are looking for jobs in Afyon mainly belong to young population, aged from 20 to 44. In terms of educational background, the number of unemployed people in Afyon is significantly high within primary education and secondary education (high school equivalent) levels, followed by graduates with two-year higher education and university degrees respectively. Employments within both educational backgrounds are not at desired levels. As previously explained in the second chapter of this document, formal vocational and technical education in Turkey is mainly operated at two levels including Vocational Education and Training High Schools and Two-Year Higher Schools within Universities. It must be noted that two-year higher schools are not only providing vocational and technical education, however the majority of the programs have such nature. For example the number of higher school graduates in Afyonkarahisar was 4370, and 4188 of which graduated from vocational and technical programs.

Table.31. ISKUR Data on the Occupational Distribution of People Registered as Unemployed in Afyonkarahisar, 2012

	Male	Female	TOTAL
Unknown	15	11	26
Office Staff	1036	1533	2569
Sales and Services Staff	1258	667	1925
Jobs with no Qualification Requirements	4915	2179	7094
Qualified Agriculture, Forestry, Fishery Products Staff	146	23	169
Professional Jobs	506	565	1071
Artisans and Related Jobs	1194	156	1350
Technicians, Associate Professional Occupational Groups	1367	455	1822
Plant and Machine Operators and Assemblers	1836	86	1922
Executive Staff	87	29	116
TOTAL	12360	5704	18064

When information from ISKUR is analyzed by occupational distribution of registered unemployed people, it is seen that a vast majority is looking for jobs that require no specific qualification, followed by office services jobs, plant and machine operator and assembling jobs and sales & services jobs.

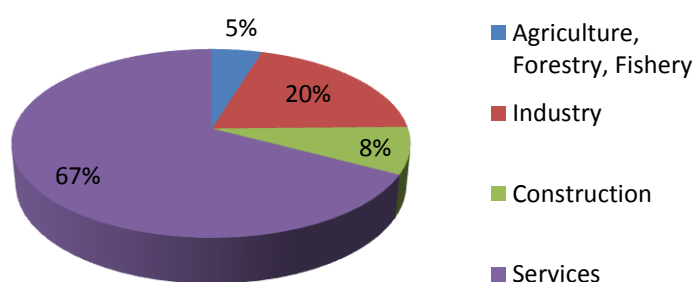
A similar trend can be seen with open jobs in ISKUR, but not enough to meet the job demands.

Table.32. ISKUR Data on Open Jobs in Afyonkarahisar, 2012

OPEN JOBS	Public	Private	TOTAL
Office Staff	4	702	706
Sales and Services Staff	10	448	458
Jobs with no Qualification Requirements	760	2363	3123
Qualified Agriculture, Forestry, Fishery Products Staff	93	7	100
Professional Jobs	1	215	216
Artisans and Related Jobs	46	447	493
Technicians, Associate Professional Occupational Groups	31	254	285
Plant and Machine Operators and Assemblers	71	222	293
Executive Staff	0	11	11
TOTAL	1016	4669	5685

Within 5685 Open Job announcements in 2012, 4481 people were recruited. The sectoral distribution of job placements is given below.

Sectoral Distribution of Job Placements



In total, most common jobs in Afyonkarahisar are: manual workers (general), manual workers (cleaning), mining and stone quarry workers, customer services, sales and advertisement.

Moreover, ISKUR conducted workforce market needs assessment surveys in 2011⁶¹. The surveys included 4 questions and replied by companies that are registered to ISKUR. The questions were mainly designed to find out different aspects of the workforce in the province. 660 companies completed the survey in Afyonkarahisar. According to the results, there is a lack of human resources in 16 different occupations. Top 5 lacking occupations in Afyonkarahisar can be listed as: Marble

⁶¹ ISKUR, 2011. Final Report on Workforce Market Research in Afyonkarahisar.

workers, cleaning staff, vegetable harvesting workers, motor technicians and workers in tourism and hotel management.

Furthermore, the survey also focused on the needed occupations as well as the skills and qualifications that employers are looking for. Top ranked skills and qualifications can be listed as: knowledge on specific occupation, team work and communication skills. Foreign language skills and sales and marketing knowledge ranked the lowest.

Finally, the results of the ISKUR survey⁶² provided a short term increase/decrease expectation trends among the recruitments in the province. According to results, recruitment in 16 occupations is expected to increase, including respectively: Blue-Collar workers (General), marble workers, miners, sales representatives, freight handling and carriage workers, marble block cutting machine operators, motor technicians, drivers (freight carriage), dough masterhands, heavy equipment machine operators, boiler stokers, drivers (passenger carriage), other masterhands, foremens etc., food technicians, welders, investment advisors. Also, recruitment in 13 occupations is expected to decrease: maidservants and other service workers, other private education teachers, couriers, cooks, blue-collar workers (general, cleaning and office), other secondary education teachers, cleaning staff, office staff, butchers, heavy truck drivers, automotive dyers.

Kütahya

According to Kütahya Provincial Employment and Vocational Education Committee Report⁶³ of 2011 (2012 report is not yet available), the workforce participation rate in Kütahya is lower than Turkey (49,9% in 2011) average. The unemployment rate was 6,5% for Kütahya, which is also lower than Turkey average (11,9% in 2010).

Table.36. Kütahya in Employment Numbers

	Workforce Participation Rate (%)	Unemployment Rate (%)	Employment Rate (%)
Kütahya	46,7	6,5	43,7

SGK Data reveals that as of January 2012, there were 8.941 workplaces in Kütahya (as part of 4a workplaces)⁶⁴. In Turkey, there were 1.427.590 workplaces in total. When compared with Afyonkarahisar, the number of workplaces in Kütahya is about one third of Afyon's⁶⁵.

⁶² ISKUR, 2011. Final Report on Workforce Market Research in Afyonkarahisar.

⁶³ ISKUR 2012, Kütahya Provincial Employment and Vocational Education Committee Report 2011.

⁶⁴ ISKUR, 2011. Analysis of Turkey's Workforce Market: 2011-2nd Period.

⁶⁵ ISKUR, 2011. Analysis of Turkey's Workforce Market: 2011-2nd Period.

ISKUR stated that the number of registered workforce in Kütahya was 21.843 people in 2011, while 17.687 of them were registered as unemployed. 6496 open jobs were announced (vast majority in private sector) and 4570 people were recruited during 2011.

Table.37. ISKUR Main Employment Data on Kütahya, 2011⁶⁶

2011	Female	Male	Total
Registered Workforce	5242	16601	21843
Registered Unemployed	4778	12909	17687
Application	4111	6792	10903
Unemployed	3803	5855	9658
Other	308	937	1245
Open Jobs	-	-	6496
Public Sector	-	-	1467
Private Sector	-	-	5029
Work Placement	883	3687	4570
Public Sector	76	1414	1490
Private Sector	807	2273	3080

Table.38. İŞKUR Data on Unemployed People by Age Group and Educational Background in Kütahya, 2011⁶⁷

	Age Group							
	15-19	20-24	25-29	30-34	35-39	40-44	45-64	65+
Total	241	1014	1063	907	646	373	325	1
Male	174	796	879	729	493	322	283	
Female	67	218	174	178	153	51	42	1
	Education							
	Illiterate	Literate	Primary Ed.	High School	Two-Year Higher Education	University	Master	Phd
Total	90	21	2579	1515	263	95	7	
Male	69	8	1982	1348	208	68	4	
Female	21	13	597	167	55	27	3	

Among the people who applied to ISKUR and registered as unemployed in Kütahya, the highest shares belong people within 20-24 and 25-29 age groups. Considering all age groups, people who are looking for jobs in Kütahya mainly belong to young population, aged from 20 to 39, constituting almost 80% of people who are registered as unemployed. In terms of educational background, the number of unemployed people in Kütahya is significantly high within primary education and

⁶⁶ ISKUR 2012, Kütahya Provincial Employment and Vocational Education Committee Report 2011.

⁶⁷ ISKUR 2011, Kütahya Provincial Employment and Vocational Education Committee Activity Report.

secondary education (high school equivalent) level graduates, followed by graduates with two-year higher education degrees, but not as much.

Table.39. ISKUR Data on the Occupational Distribution of People Registered as Unemployed in Kütahya, 2011

	Male	Female	TOTAL
Office Staff	1729	964	2693
Sales and Services Staff	254	94	348
Jobs with no Qualification Requirements	5207	2395	7602
Qualified Agriculture, Forestry, Fishery Products Staff	46	6	52
Professional Jobs	415	345	760
Artisans and Related Jobs	915	68	983
Technicians, Associate Professional Occupational Groups	2223	380	2603
Plant and Machine Operators and Assemblers	460	58	518
Executive Staff	39	26	65
Others	1621	442	2063
TOTAL	12909	4778	17687

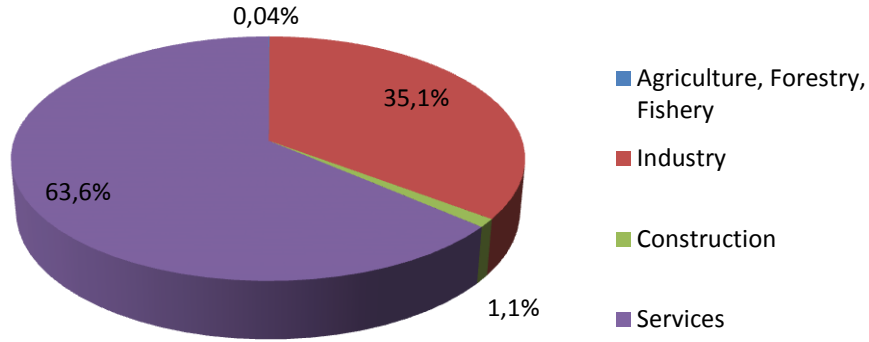
When information from ISKUR is analyzed by occupational distribution of registered unemployed people, it is seen that a vast majority is looking for jobs that require no specific qualification, followed by office services jobs, artisans & related jobs, and technicians, associate professional occupational groups.

Table.40. ISKUR Data on Open Jobs in Kütahya, 2011

	Public	Private	TOTAL
Office Staff	1	114	115
Sales and Services Staff	20	122	142
Jobs with no Qualification Requirements	688	3284	3972
Qualified Agriculture, Forestry, Fishery Products Staff	586	13	599
Professional Jobs	4	165	169
Artisans and Related Jobs	8	514	522
Technicians, Associate Professional Occupational Groups	83	256	339
Plant and Machine Operators and Assemblers	77	557	634
Executive Staff		4	4
Others			
TOTAL	1467	5029	6496

In total, 6496 open jobs were submitted to ISKUR in 2011 and 4481 people were recruited. Women's share in work placements were notably lower with 19,32% share. In terms of sectorial distribution of work placements, work placements in services sector is significantly higher, followed by industry. The 2011 sectorial distribution of work placements in Kütahya is given below.

Sectorial Distribution of Job Placements in Kütahya



ISKUR conducted workforce market needs assessment surveys in 2011⁶⁸ including Kütahya. The questions of the survey were mainly designed to find out different aspects of the workforce in the province. One of the survey questions aimed to reveal which occupation groups are mostly needed in the province. According to the results, top 5 lacking occupations in Kütahya are listed as: Blue-collar Workers (General), nurses, cleaning staff, accounting staff and drivers for passenger transportation vehicles.

Finally, the results of the ISKUR survey⁶⁹ provided a short term increase/decrease expectation trends among the recruitments in the province. According to results, recruitment in 5 occupations is expected to increase, including respectively: other miners and stone quarrymen, other miners and stone quarrymen (no required qualifications), drivers (freight carriage), mine engineers, accounting profession staff. Also, recruitment in 12 occupations is expected to decrease: cleaning staff, blue-collar worker (construction, general, cleaning), office staff, other plastic product manufacturing workers, construction engineers, other office staff, maidservants and other service workers, central heating stokers, hairdressers.

⁶⁸ ISKUR, 2011. Final Report on Workforce Market Research in Kütahya.

⁶⁹ ISKUR, 2011. Final Report on Workforce Market Research in Afyonkarahisar.

Uşak

According to Uşak Provincial Employment and Vocational Education Committee Activity Report⁷⁰ of 2012, the participation rate of the workforce in Uşak is at the same level with Afyonkarahisar but higher than Kütahya. Also, unemployment rate in Uşak is lower than Turkey average (9,8% in 2011), as in the other two other project provinces.

Table.44. Uşak in Employment Numbers

	Workforce Participation Rate (%)	Unemployment Rate (%)	Employment Rate (%)
Uşak	52,7	4,7	50,2

SGK data reveals that as of January 2012, there are 7.035 workplaces in Uşak (as part of 4a workplaces)⁷¹.

IŞKUR stated that the number of registered workforce in Uşak was 22.822 people in 2012, while 15.382 of them were registered as unemployed. 4238 open jobs were announced (more than 85% in private sector) and 3023 people were recruited during the year.

Table.45. İSKUR Main Employment Data on Uşak, 2012

	Female	Male	Total
Registered Workforce	10587	12235	22822
Registered Unemployed	7571	7811	15382
Application	6371	8298	14669
Unemployed	6371	8298	14669
Other	-	-	-
Open Jobs	-	-	4238
Public Sector	-	-	553
Private Sector	-	-	3685
Work Placement	1714	1309	3023
Public Sector	293	318	661
Private Sector	1421	991	2412

⁷⁰ İŞKUR, 2012. Uşak Provincial Employment and Vocational Education Committee Activity Report 2012.

⁷¹ İSKUR, 2011. Analysis of Turkey's Workforce Market: 2011-2nd Period.

Table.46. İŞKUR Data on Unemployed People by Age Group and Educational Background in Uşak, 2012⁷²

	Age Group							
	15-19	20-24	25-29	30-34	35-39	40-44	45-64	65+
Total	558	2956	3030	2616	2276	1806	2107	34
Male	311	1502	1533	1318	1061	900	1167	19
Female	247	1454	1497	1298	1215	905	940	15
	Education							
	Illiterate	Literate	Primary Ed.	High School	Two-Year Higher Education	University	Master	Phd
Total	197	101	8962	4135	1059	905	23	-
Male	76	40	4765	2010	468	445	7	-
Female	121	61	4197	2125	591	460	6	-

Among the people who applied to İSKUR and registered as unemployed in Uşak, the highest share belong people aged 25-29 and 20-24. Considering all age groups, people who are looking for jobs in Uşak mainly belong to young population, however it should be noted that in terms of unemployment numbers, there is less difference in Uşak within different age groups when compared with the other two project provinces. Moreover, unemployment levels follow a similar trend between women and men. According to educational background, the number of unemployed people in Uşak is very high within primary education graduates and followed by secondary education (high school equivalent) graduates. Unemployment among two-year higher education and university graduates are at around the same level, but far less than primary and secondary education graduates.

Table.47. İSKUR Data on the Occupational Distribution of People Registered as Unemployed Uşak, 2012

	Male	Female	TOTAL
Unknown	-	-	-
Office Staff	1388	508	1896
Sales and Services Staff	843	730	1573
Jobs with no Qualification Requirements	843	730	7003
Qualified Agriculture, Forestry, Fishery Products Staff	17	95	112
Professional Jobs	434	338	772
Artisans and Related Jobs	182	800	982
Technicians, Associate Professional Occupational Groups	385	582	967
Plant and Machine Operators and Assemblers	469	1532	2001

⁷² İSKUR 2012, Uşak Provincial Employment and Vocational Education Committee Activity Report 2012.

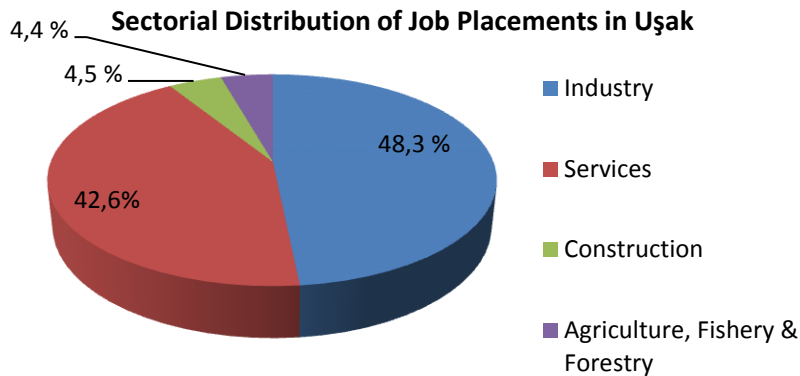
Executive Staff	20	56	76
TOTAL	7571	7811	15382

When information from ISKUR is analyzed by occupational distribution of registered unemployed people in Uşak, it is seen that a vast majority is looking for jobs that require no specific qualification, followed by operating and assembling jobs, office services jobs and sales & services jobs.

Table.48. ISKUR Data on Open Jobs in Uşak, 2012

OPEN JOBS	Public	Private	TOTAL
Office Staff	0	254	254
Sales and Services Staff	0	401	401
Jobs with no Qualification Requirements	524	1511	2035
Qualified Agriculture, Forestry, Fishery Products Staff	0	5	5
Professional Jobs	0	198	198
Artisans and Related Jobs	6	425	431
Technicians, Associate Professional Occupational Groups	0	187	187
Plant and Machine Operators and Assemblers	23	698	721
Executive Staff	0	6	6
TOTAL	553	3685	4238

In total, 4238 open jobs were submitted to ISKUR in 2012 and 3023 people were recruited. Private sector's share for open jobs were notably higher with 86,9% as well as work placements in private sector with 70,8% share. In terms of sectoral distribution of work placements, work placements in services sector is significantly higher, followed by industry. The 2012 sectorial distribution of work placements in Uşak is given below.



Unlike Afyon and Kütahya, work placements in Uşak realized in the industry sector, particularly in manufacturing workplaces. Services sector was the leading sector for the other project provinces, but ranked second in Uşak, slightly below the industry sector.

Moreover, ISKUR conducted workforce market needs assessment surveys in 2011⁷³. The surveys included 4 questions and replied by companies that are registered to ISKUR. The questions were mainly designed to find out different aspects of the workforce in the province. The results of the study provided a short term increase/decrease expectation trends among the recruitments in the province. According to results, recruitment in 13 occupations is expected to increase, including respectively: Hospital management and organization profession staff, nurses, welders, paint/colour workers, leather stretching machine operators, carpet weaver (automatic workbench), rug weavers, other bakers, pastry and candy manufacturing workers, moulders, wood processing machine operators, blue-collar worker (general), leather workers and agriculture engineers. Also, recruitment in 5 occupations is expected to decrease: other bending/weaving /dyeing workers, other heavy construction workers, waiters, cleaning staff and accounting assistant staff.

⁷³ ISKUR, 2011. Final Report on Workforce Market Research in Uşak.

4. Comparative Assessment on the Vocational Education and Training Policies and Data by Selected Countries

Countries of the World are constantly and increasingly seeking for a labor force that is equipped with specific occupational skills that modern economies require - both in professional, managerial and technical jobs. Obtaining a tertiary education is not the only way to meet the labor-market needs. Vocational education and training (VET) is also an important tool in the provision of necessary workforce for today's labor markets in a fast-changing economical & technical environment. The main challenges that VET systems are facing today include globalization, increased personal mobility, structural change in industrial life, technological advances and demographic changes⁷⁴.

Countries have adopted very different educational structures that changes fundamentally by their focus on job transition. Some of them stress on a vocational education that provides specific job-related skills in order to prepare students to work in specific occupations; while others focus on a general type of education that provides students with a more broad and basic educational background in order to prepare them for further education levels, learning or on-the-job training.

The variety within the VET systems gets even more complicated. OECD defines vocational education as *“education that offers participants the opportunity to acquire the practical skills, knowledge and understanding necessary for employment in a particular occupation or trade or class of occupations or trades. Successful completion of such programmes leads to a labor market-relevant vocational qualification recognized by the competent authorities in the country in which it is obtained.”*⁷⁵ However the system works differently in each country.

Within the purposes of this study and in order to see Turkey's current standing in terms of other vocational education and training systems, basic information and relevant data including education and employment statistics of selected countries will be given in this part.

As stated previously, Turkey is currently passing through a harmonization process with the European Union legislation. Improving the VET systems, both at the policy level and by practical implementations, constitute an important part of this process. For this reason, EU's current policies regarding the VET systems will be briefly summarized in this part within the purposes of this assessment.

4.1. Regulation and Policies on Vocational Education and Training - EU

The EU has a supporting role in terms of education and training policies. Member States are in charge of their own education and training systems, but they act in cooperation within the EU framework in

⁷⁴ Hippach-Schneider, U. et al. 2007. Vocational Education and Training in Germany: Short Description. Online available at: http://www.cedefop.europa.eu/en/Files/5173_EN.PDF

⁷⁵ OECD, 2010. Education at a Glance 2010: OECD Indicators.

order to achieve the common goals set by the Union. The European Commission provides encouragement and support for policy cooperation among member states and funding for educational, vocational programmes such as the Life Long Learning Programme.

While vocational training was determined as an area of Community action in 1957 by the *Treaty of Rome*, education was officially recognized as an area of European Union competency in the *Maastricht Treaty* which established the European Community in 1992⁷⁶.

Europe considers that better vocational education is a substantial tool in order to respond adequately to the challenges of global competition, high numbers of low-skilled workers, young unemployment and ageing populations. European Commission acts together with member governments, employers' and workers' groups and countries outside the Union with the aim of strengthening vocational education across Europe. Also, the Commission's work on VET is supported by 2 agencies, namely 'European Center for the Development of Vocational Training' (Cedefop) and 'European Training Foundation' (ETF).

EU policies in vocational education and training (VET) is driven by the *Copenhagen process of 2002* and supported by the European Commission. The Process started in response to the *Lisbon Agenda* that focuses on growth & jobs. It was EU's collective response for the challenges of the new millennium including globalization, demographic change and the knowledge society. The Lisbon Strategy regarded vocational education and training as being vital in order to achieve the goal of Europe becoming "the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion"⁷⁷.

The 2002 *Copenhagen declaration*⁷⁸ set up a process of cooperation in vocational education and training (VET) in Europe, involving governments, social partners and EU institutions, in which EU Member States, Norway and candidate countries participate. The overall aim was to advance the quality of vocational training and to encourage more individuals to make better use of vocational learning opportunities, whether at school, in higher education, in the workplace, or through private courses. National education ministers meet in an interval of two years to review the progress⁷⁹. The Copenhagen process has enabled the adoption of a substantial body of policy on VET over its first ten years. These policies were not static; they developed and improved over time. First steps included

⁷⁶ Europa.eu, 2013. Education and Training: Treaty Basis. Online available at: http://ec.europa.eu/education/lifelong-learning-policy/treaty_en.htm

⁷⁸ European Commission, 2002. The Copenhagen Declaration. Online Available at: http://ec.europa.eu/education/pdf/doc125_en.pdf

⁷⁹ Europa.eu, 2013. Education and Training: Copenhagen Process. Online available at: http://ec.europa.eu/education/vocational-education/copenhagen_en.htm

the development of the common tools to enable different VET systems of Europe become more harmonized including a joint qualification framework, a credit transfer system and the establishment of common principles for quality assurance which are launched in 2008 and 2009, not timely far from the review of progress of the Lisbon Strategy⁸⁰.

Following the Copenhagen process, general short-term objectives for VET were identified through different communiqués including *Helsinki* and *Bordeaux*, but in 2010 a long-term vision and a package of common goals in VET for 2010-2020 period were set by *Bruges communiqué* with a commitment to implement a number of actions by the member states. Future priorities for enhanced European cooperation in VET were also identified in 2009 by adopting measures under 4 priorities: implementation of common tools, promotion of quality and attractiveness of VET, development of links with the labor market and enhancement of European cooperation. More information on some of selected initiatives, actions and tools devoted to VET in Europe is given below⁸¹:

<p>The European Credit system for Vocational Education and Training (ECVET): The development of ECVET began in 2002 following the Copenhagen Process due to the need for a credit transfer system for VET. The final approval to the legislation was given in 2009 by national governments and European Parliament. By ECVET, an individual's learning outcomes are assessed and validated in order to transfer credits from one qualification system to another. This way, previous learning outcomes can be accumulated and applied in different countries.</p>
<p>Quality Assurance in Vocational Education and Training (EQAVET): EQUAVET is a reference tool for policy-makers which was adopted in 2009 based on a four step quality cycle that covers goal setting and planning, implementation, evaluation and review. It is voluntary but EU encourages public authorities and other bodies to get involved in the system. Member states are responsible for developing a national approach for the quality assurance system including the establishment of national reference points for quality assurance and active participation at relevant European level network.</p>
<p>An Agenda for new skills and jobs: Through the Europe 2020 Strategy 'An Agenda for new skills and jobs' The Commission aims to reach better employment rate for women and men within the 20-64 years age group by 2020, as well as reducing the early school leaving rate and increasing the number of younger people in higher education or equivalent vocational education.</p>
<p>Europass: The Europass service was developed in order to make the job-search process more effective and transparent throughout Europe. This standardized method enables individuals to submit their qualifications and skills in a way that employers can correctly assess and appreciate. The CV Portal is run by Cedefop. Europass portal is to be enriched as the European Skills Passport, a folder that will allow EU Citizens to present their qualifications in a more comprehensive way.</p>
<p>Mobility in Vocational Education and Training – Leonardo da Vinci Programme: Mobility in training and education has become an important emphasis at the European level since it is considered that opportunities in abroad education and training will contribute to employment prospects of EU citizens. As a part of LifeLong Learning Programme (LLL), Leonardo da Vinci Programme funds practical projects in the field of VET particularly for placements of young apprentices and trainees in businesses outside their own country, and cooperation projects linking vocational training institutes and businesses. The programme is open to people that range from trainees in initial vocational training, to graduates, as well as VET professionals and anyone from organisations active in VET. It enables organisations to work with partners across Europe and exchange best practices. Moreover, the opportunities of the Programme makes VET more attractive and contributes to higher level goals of the EU by increasing the overall competitiveness of the labor market. During the first 15 years of its implementation, the Programme has provided more than 600.000 training placements for young individuals, more than 110.000 exchanges for VET teachers and trainers, and supported around 2.000 innovative projects⁸².</p>

⁸⁰ Brandstetter, G. et al, 2012. Experiencing VET in Europe: Insights into the learning Experiences of 17 and 18 Year old VET Students in 7 EU Countries.

⁸¹ Europa.eu, 2013. Education and Training: Copenhagen Process. Online available at: http://ec.europa.eu/education/vocational-education/copenhagen_en.htm

⁸² European Commission, 2010. COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS: A new impetus for

Within 10 years, the objectives set were only partly accomplished and economic crisis has made economic and social challenges even more material. Progress on the goals of EU policy has been incredibly variable throughout the EU, and more is expected to be achieved in the vast majority of member countries. In 2010 EC launched the 'Europe 2020 Strategy', in which education, training and lifelong learning has significant roles in order to ensure smart and inclusive growth for Europe. Five targets were set to be achieved by 2020. These targets are⁸³:

- 75 % of the population aged 20-64 should be employed.
- 3% of the EU's GDP should be invested in R&D.
- The "20/20/20" climate/energy targets should be met.
- The share of early school leavers should be under 10% and at least 40% of the younger generation should have a tertiary degree or diploma.
- 20 million less people should be at risk of poverty.

Also, The European Council set priorities and strategic objectives for 2011-2020 period. Six strategic objectives have been identified, namely⁸⁴:

- making initial VET an attractive learning option
- fostering the excellence, quality and relevance of VET to the labor market
- enabling flexible access to training and qualifications
- encouraging international mobility in VET
- promoting innovation, creativity and entrepreneurship, and the use of new technologies
- making VET accessible

The emphasis on VET in Europe which was initiated by the Copenhagen process has supported the Member States in modernizing their VET systems, boosted the development of the learning outcomes approach, the lifelong learning perspective and has supported the development of common reference tools including Europass, European Qualifications Framework - EQF, European Credit System for VET – ECVET, and European Quality Assurance Reference Framework for VET–EQAVET. The process made important contribution in reaching the common goals in the VET area. However within the framework of 2020 agenda, more concrete actions and effective tools are needed. The 2020 strategy expects member states to realign common targets through national reform programmes which will be tailored for countries' own circumstances.

European cooperation in Vocational Education and Training to support the Europe 2020 strategy. Online available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0296:FIN:EN:PDF>

83 European Commission, 2010. Education and Training: From the Lisbon Strategy to "Europe 2020". Online Available at: http://ec.europa.eu/education/focus/focus479_en.htm

84 Europa.eu, 2013. Priorities for vocational education and training (2011-2020). Online available at: http://europa.eu/legislation_summaries/education_training_youth/vocational_training/ef0028_en.htm

4.2. Education and Employment Status and Trends – Selected Countries

Table.52. Trends in Educational Attainment: 25-26 year-olds by Selected Countries⁸⁵

Percentage, by educational level		2000	2005	2010	Average growth rate
Australia	Below upper secondary	41	35	27	-4,2
	Upper secondary and post-secondary non-tertiary	31	33	36	1,3
	Tertiary education	27	32	38	3,2
Austria	Below upper secondary	24	19	18	-3,1
	Upper secondary and post-secondary non-tertiary	62	63	63	0,2
	Tertiary education	14	18	19	3,3
Belgium	Below upper secondary	41	34	30	-3,3
	Upper secondary and post-secondary non-tertiary	31	35	36	1,2
	Tertiary education	27	31	35	2,6
Canada	Below upper secondary	19	15	12	-5,0
	Upper secondary and post-secondary non-tertiary	41	39	38	-0,7
	Tertiary education	40	46	51	2,4
Denmark	Below upper secondary	21	19	24	1,3
	Upper secondary and post-secondary non-tertiary	52	47	42	-2,1
	Tertiary education	26	34	33	2,4
France	Below upper secondary	37	33	29	-2,3
	Upper secondary and post-secondary non-tertiary	41	41	42	0,2
	Tertiary education	22	25	29	2,8
Germany	Below upper secondary	18	17	14	-2,5
	Upper secondary and post-secondary non-tertiary	58	59	59	0,2
	Tertiary education	23	25	27	1,3
Italy	Below upper secondary	58	50	45	-2,5
	Upper secondary and post-secondary non-tertiary	33	38	40	2,1
	Tertiary education	9	12	15	4,7
Japan	Below upper secondary	17	m	m	-
	Upper secondary and post-secondary non-tertiary	49	60	55	1,1
	Tertiary education	34	40	45	2,9
Korea	Below upper secondary	32	24	20	-4,7
	Upper secondary and post-secondary non-tertiary	44	44	41	-0,9
	Tertiary education	24	32	40	5,2
Netherlands	Below upper secondary	35	28	27	-2,6
	Upper secondary and post-secondary non-tertiary	41	42	41	-0,2
	Tertiary education	23	30	32	3,3
Turkey	Below upper secondary	77	72	69	-1,1
	Upper secondary and post-secondary non-tertiary	15	18	18	1,9
	Tertiary education	8	10	13	4,6
United Kingdom	Below upper secondary	37	33	25	-4,0
	Upper secondary and post-secondary non-tertiary	37	37	37	0,0
	Tertiary education	26	30	38	4,0
United States	Below upper secondary	13	12	11	-1,3
	Upper secondary and post-secondary non-tertiary	51	49	47	-0,7
	Tertiary education	36	39	42	1,3

⁸⁵ OECD, 2010. Education at a Glance 2010: OECD Indicators.

Percentage, by educational level		2000	2005	2010	2000-2010 average growth rate
OECD average	Below upper secondary	36	30	26	-3,2
	Upper secondary and post-secondary non-tertiary	42	44	44	0,6
	Tertiary education	21	27	30	3,7
EU21 average	Below upper secondary	36	29	25	-3,7
	Upper secondary and post-secondary non-tertiary	45	48	48	0,9
	Tertiary education	19	24	28	4,0

Table. 53. Percentage of 25-64 year-olds population whose highest level of education is vocational upper secondary or post-secondary non-tertiary, by selected countries (ISCED 3/4)

	Men	Women	Total
Australia	12,7	6,4	19,1
Austria	30,4	27,1	57,5
Belgium	13,8	11,3	25
Canada	7,7	4,2	11,9
Denmark	19,5	15,4	34,9
France	17,1	13,2	30,3
Germany	27,7	28,5	56,2
Italy	17,6	13,3	30,9
Korea	10,3	9,4	19,7
Netherlands	16,9	16,6	33,5
Switzerland	18,4	20,5	38,9
Ireland	6	5,1	11,1
Sweden	18,3	12,9	31,2
Turkey	5,5	3	8,4

Table.54. Unemployment Rate by Gender and Age Groups, EU-27⁸⁶

	2005	2006	2007	2008	2009	2010	2011
Male	8.4	7.6	6.6	6.7	9.1	9.7	9.6
Female	9.8	9	7.9	7.6	9	9.6	9.8
Less than 25 year-olds	18.8	17.5	15.7	15.8	20.1	21.1	21.4
Between 25 - 74	7.7	7.1	6.1	6	7.6	8.3	8.3
Long Term Unemployment Rate	4.5	3.7	3.1	2.6	3	3.9	4.1
Very long-term Unemployment Rate	2.4	2.2	1.8	1.5	1.5	1.8	2.2

Source: Eurostat

⁸⁶ Eurostat, (). Online available at:
[http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_EU-27,_2002-2011_\(%25\).png&filetimestamp=20120502101826](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_EU-27,_2002-2011_(%25).png&filetimestamp=20120502101826)

Table.55. EU-27 Youth Unemployment Figures, 2009-2010⁸⁷

	Youth Unemployment Rate			Youth Unemployment Ratio		
	2009	2010	2011	2009	2010	2011
EU 27	20.1	21.1	21.4	8.7	9	9.1
Euro Area	20.2	20.9	20.8	8.7	8.7	8.7
Belgium	21.9	22.4	18.7	7.1	7.3	6
Bulgaria	16.2	23.2	26.6	4.8	6.7	7.3
Czech Republic	16.6	18.3	18	5.3	5.7	5.4
Denmark	11.8	14	14.2	8.4	9.4	9.6
Germany	11.2	9.9	8.6	5.8	5.1	4.5
Estonia	27.5	32.9	22.3	11	12.6	9.1
Ireland	24.4	27.8	29.4	11.5	11.8	11.7
Greece	25.7	32.8	44.4	8	10	13
Spain	37.8	41.6	46.4	17.1	17.8	19
France	23.9	23.6	22.9	9.2	9	8.5
Italy	25.4	27.8	29.1	7.4	7.9	8
N+S Cyprus	13.8	16.7	22.4	5.7	6.8	8.5
Latvia	33.6	34.5	29.1	14	13.9	11.2
Lithuania	29.2	35.1	32.9	8.9	10.4	9.6
Luxembourg	16.5	15.8	15.6	5.5	3.5	4.2
Hungary	26.5	26.6	26.1	6.5	6.6	6.4
Malta	14.4	13.1	13.7	7.4	6.7	7.1
Netherlands	7.7	8.7	7.6	4.8	6	5.3
Austria	10	8.8	8.3	6	5.2	5
Poland	20.6	23.7	25.8	7	8.2	8.7
Portugal	24.8 (estimate)	27.7 (estimate)	30.1	7.9	8.2	11.7
Romania	20.8	22.1	23.7	6.4	6.9	7.4
Slovenia	13.6	14.7	15.7	5.6	5.9	5.9
Slovakia	27.3	33.6	33.2	8.6	10.4	10
Finland	21.5	21.4	20.1	10.9	10.6	10.1
Sweden	25	25.2	22.9	12.8	13	12
United Kingdom	19.1	19.6	21.1	11.4	11.6	12.4

Source: Eurostat

⁸⁷ Eurostat,(). Young Unemployment. Online Available at:
[http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Youth_unemployment,_2011Q4_\(%25\).png&file_timestamp=20120502094632](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Youth_unemployment,_2011Q4_(%25).png&file_timestamp=20120502094632)

Table.56. Unemployment Rate by EU-27 and selected countries, 2000-2011⁸⁸:

	Unemployment Rate (%)			
	2000	2005	2010	2011
EU-27	8.7	9	9.7	9.7
Euro Area	8.5	9.1	10.1	10.2
Belgium	6.9	8.5	8.3	7.2
Bulgaria	16.4	10.1	10.2	11.2
Czech Republic	8.7	7.9	7.3	6.7
Denmark	4.3	4.8	7.4	7.6
Germany	7.5	11.2	7.1	5.9
Estonia	13.6	7.9	16.9	12.5
Ireland	4.2	4.4	13.7	14.4
Greece	11.2	9.9	12.6	17.7
Spain	11.1	9.2	20.1	21.7
France	9	9.3	9.7	9.7
Italy	10.1	7.7	8.4	8.4
N+S Cyprus	4.9	5.3	6.5	7.8
Latvia	13.7	8.9	18.7	15.4
Lithuania	16.4	8.3	17.8	15.4
Luxembourg	2.2	4.6	4.5	4.8
Hungary	6.4	7.2	11.2	10.9
Malta	6.7	7.2	6.8	6.5
Netherlands	3.1	5.3	4.5	4.4
Austria	3.6	5.2	4.4	4.2
Poland	16.1	17.8	9.6	9.7
Portugal	4	7.7	11	12.9
Romania	7.3	7.2	7.3	7.4
Slovenia	6.7	6.5	7.3	8.2
Slovakia	18.8	16.3	14.4	13.5
Finland	9.8	8.4	8.4	7.8
Sweden	5.6	7.7	8.4	7.5
United Kingdom	5.4	4.8	7.8	8
Croatia	-	12.7	11.8	13.2
Turkey	-	9.2	10.7	-
Norway	3.2	4.5	3.5	3.3
Japan	4.7	4.4	5.1	4.6
United States	4	5.1	9.6	8.9

Source: Eurostat

⁸⁸ Eurostat, (). Unemployment Rate. Online Available at:
[http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_2000-2011_\(%25\).png&filetimestamp=20120502100338](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Unemployment_rate,_2000-2011_(%25).png&filetimestamp=20120502100338)

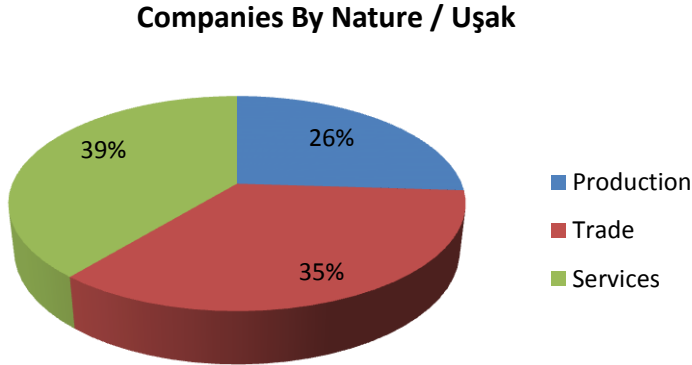
5. Survey Analysis Data – Results

In order to better assess the information and data gathered from the project provinces and presented in the previous parts of this report, a survey study for the companies has been conducted in project provinces through the Uşak Chamber of Trade and Industry. A survey was developed in consultation with the Uşak Chamber of Trade and Industry and implemented to 30 participants in Uşak, 10 participants in Afyonkarahisar and 10 participants in Kütahya. In consultation with the Uşak Chamber of Trade and Industry and regional stakeholders, the results of the regional surveys had been assessed and analysed together with the recently completed survey study results of the Chamber. The results of the work are presented below. Although the participation rate to the survey varies in provinces and shows some differences for provinces, they are capable of reflecting the current situation and the problems faced by the enterprises in the region.

UŞAK

Companies by Nature:

The companies in Uşak show a balanced distribution in terms of their main activities. More than 15 % of the companies operate in at least two different areas. Below chart presents the distribution of companies in Uşak by nature.



Breakdown of Companies by Sectors They Operate in:

The results of the survey reveal that there are 59 operating sectors in Uşak. Construction & Excavation and insurance sectors rank the highest in terms of the number of businesses; however, when textile sector is assessed together with yarn manufacturing, blanket, rug and textile weaving, clothing & confection and recycling activities, it can be seen that 16,35 % of the respondents are active in textile sector.

Breakdown of Companies in Uşak by sectors

Sector	%	Sector2	%
Construction and Excavation	8,91	Durable Consumer Goods	1,12
Insurance	5,61	Communication	1,12
Textile	5,19	Flour Products	1,05
Food Sale	4,91	Natural Gas and heating installations	0,98
Food Manufacturing	3,93	Carpet Manufacturing and Sale	0,98
Logistics and Transport	3,86	Jewelry	0,98
Automotive and Spare Parts	3,51	Security, Human Resources, Consulting	0,98
Leather Manufacturing an Confection	3,16	Meat Products	0,84
Construction Materials	3,09	Iron and Steel Manufacturing and Sale	0,84
Blanket, Rug and Textile Weaving	2,95	Glassware, Household Appliances and Furnishings	0,84
Yarn Manufacturing	2,81	Lube Oil Manufacturing	0,77
Furniture and Wood Products	2,74	Project and Mapping Services	0,77
Fuel	2,25	Gas-tube Sale	0,77
Finance	2,25	Plastic packages, bags	0,7
Clothing and Confection	2,25	Cosmetics	0,63
Machinery Manufacturing	2,11	Real- estate and Real estate Value Services	0,56
Health	2,04	Stationery	0,56
Education	2,04	Agricultural Products Sale	0,49
Mining and Mine Product	1,89	Imprint- Paint- Finishing	0,49
Recycling	1,68	Architecture and Engineering Services	0,42
Electricity and Electronic Materials	1,68	Plastic Joinery	0,42
Agricultural Activities and Animal Husbandry	1,68	Flour Manufacturing	0,42
Malls, Markets and Groceries	1,54	Building Inspection	0,42
Information and Computer Technology	1,33	Wool Washing and Trade	0,42
Restaurants, Cafeteria etc.	1,26	Ceramics	0,42
Other	1,26	Milk and Dairy Products	0,35
Chemicals and Chemical Products	1,26	Energy and Energy Systems	0,35
Printing, Publishing, Advertisement	1,26	Ready-mixed Concrete	0,28
Tourism, Hotels and Accommodation Services	1,12	Floriculture	0,28
Leather and Textile Chemicals	1,12		

Breakdown of Companies by Sub-Sectors

Many of the Uşak CTI members also operate in different sub-sectors. The breakdown of companies by sub-sectors is given below:

Sector	%	Sector2	%
Construction and Excavation	11,7%	Architecture and Engineering Services	2,1%
Textile	6,9%	Restaurants, Cafeteria etc.	2,1%
Recycling	5,3%	Fuel	1,6%
Food Sale	4,8%	Printing, Publishing, Advertisement	1,6%

Machinery Manufacturing	4,8%	Natural Gas and Heating Installations	1,6%
Blanket, Rug and Textile Weaving	4,2%	Carpet Manufacturing and Sale	1,6%
Automotive	4,2%	Yarn Manufacturing	1,6%
Wool Washing and Trade	3,7%	Chemicals and Chemical Products	1,6%
Other	3,2%	Malls, Markets and Groceries	1%
Mining and Mine Products	3,2%	Information and Computer Technology	1%
Agricultural Activities and Animal Husbandry	3,2%	Leather Manufacturing and Confection	1%
Logistics and Transportation	2,6%	Communication	1%
Furniture and Wood Products	2,6%	Tourism	1,6%
Plastics and Joinery	2,6%	Gas-tube Sale	1%
Project and Mapping Services	2,6%	Imprint- Paint- Finishing	0,5%
Durable Consumer Goods	2,1%	Leather and Textile Chemicals	0,5%
Real- Estate and Real Estate Value Services	2,1%	Marketing	0,5%
Security, Human Resources and Consulting	2,1%	Sale of Agricultural Products	0,5%
Construction Materials	2,1%	Flour Manufacturing	0,5%
Confection	2,1%		

Distribution of Employees by Sectors

The distribution of employees by top sectors is given below. Top 13 sectors constitute almost 94% of employees in Uşak. Other sectors constitute less than 1 % of the total employees.

Sectors	% Employees
Textile and Manufacturing of Textile Products	42,5
Manufacturing of Other Non-metallic Mineral Products	8,6
Wholesale and Retail Trade	7,5
Construction	5,7
Other Social, Communal and Personal Services	5,4
Transportation, Storage and Communication	5,1
Production of Food, Beverages and Tobacco	4,4
Mining and Stone Quarrying (except energy production)	3,8
Health and Social Services	3,3
Leather and Manufacturing of Leather Products	3
Hotels and Restaurants	1,6
Other Manufacturing Activities	1,6
Education	1,3

Distribution of Employees by Occupation

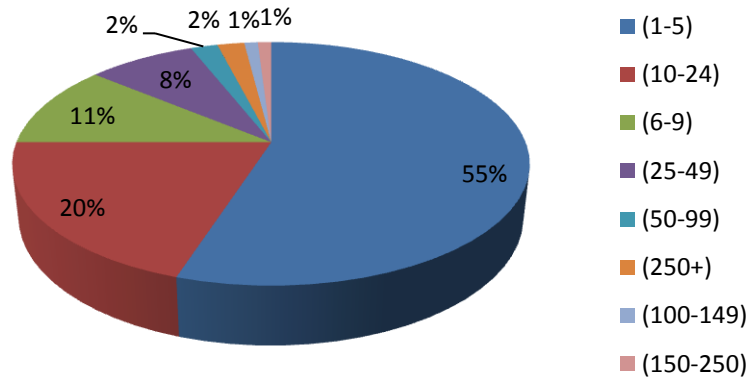
The distribution of employees by occupations is given below. Top 25 occupations constitute around 85 % of the total; and other occupations, which are not included to the table, constitute less than 1 % percentage of total employees each.

Occupation	% Total Employees
Bobbin- Folding- Bending Machine Operators	8,9
Blue-collar Worker (General)	8,5
Ceramics Worker	7,2
Open End Machine Operator	6,4
Maker of Thread of Yarn	5,7
Printing Maintenance and Repairmen (Textile)	5,1
Other Benders, Weavers, Knitters, Painters and Related Workers	4,5
Other Glass and Ceramics Oven Workers	4,1
Automatic Mining Machine Operators	3,9
Paint Colour Worker	3,6
Travel Services Staff, Buses and Train	3,2
Hospital Management and Organisation Vocation Staff	3
Sewing Machinery Operator (Fabric)	2,8
Leather Worker	2,2
Customer Representatives	2
Other Sewers and Embroiderers	2
Other Building Keepers	1,8
Carpet Weavers	1,5
Other Yarn Labourers and Coilers	1,5
Retail Sales Staff	1,4
Other Manufacturing and Related Workers (Machine)	1,4
Weaving Machine Operators	1,4
Driver (Freight Carriage)	1,3
Sales Staff	1,1
Civil Servants (School)	1

Enterprises by the Number of Employees

According to the survey results, micro scale enterprises have the highest share in Uşak. Enterprises with more than 50 employees only constitute only 6% share.

Enterprises by the Number of Employees / Uşak



Number of Employees by Sectors, Uşak

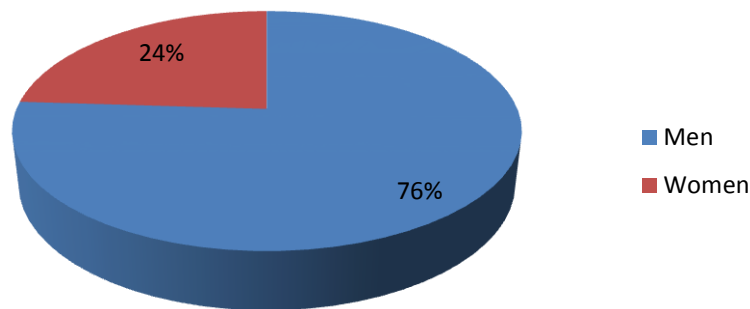
Ranking	Sector	Number of Employees							
		1-5	6-9	10-24	25-49	50-99	100-149	150-250	250+
1	Construction	141	31	43	15	0	1	2	0
2	Textile	82	20	62	37	18	7	9	13
3	Food	129	23	32	13	6	2	1	2
4	Services	94	11	34	7	0	1	0	2
5	Finance and Insurance	76	8	25	2	0	0	0	0
6	Leather	17	7	20	15	0	2	0	0
7	Machinery, Electricity, Electronics	35	8	10	5	1	0	0	0
8	Logistics	28	8	11	3	1	1	0	1
9	Automotive and Spare Parts	33	7	7	3	0	0	0	0
10	Chemicals and Chemical Products	27	5	14	2	0	0	0	0
11	Furniture and Wood Products	22	4	6	3	3	1	0	0
12	Information and Communication	27	3	4	1	0	0	0	0
13	Mining and Mine Products	12	3	5	6	2	0	0	14
14	Fuel	10	11	9	2	0	0	0	0
15	Agricultural Activities and Husbandry	23	4	2	3	0	0	0	0
16	Durable Consumer Products	21	3	0	2	1	0	0	0

In terms of providing jobs, textile sector in Uşak has the leading position. Also another labour intensive sector in Uşak is mining and mine products sector which has a significant position due to the existence of enterprises with more than 250 employees.

Enterprises by Employee Demographics

The number of female employees in Uşak is almost 3 times less than male employees. The workforce participation rate of Uşak is also lower than the Turkey average of 26,8%.

Enterprises by Employee Demographics / Uşak



Textile, services and food sectors are the leading sectors in terms of the number of female employees in Uşak. For male employees, the leading sectors are: textile, mining & mine products and

food sectors. In terms of workforce participation rate for women; textile, leather and logistics sectors has the highest shares while information and communication sector has the lowest share.

The Annual Turnover

In 2011, the vast majority of the enterprises in Uşak which responded to the survey had less than 150.000 TL or 150.000 – 500.000 TL amount of turnover. While the number enterprises with less than 150.000 turnover had decreased since 2010, the number of enterprises with 150.000 – 500.000 TL turnover increased. Enterprises with higher turnovers had a balanced distribution.

2011 Turnover by the Number of Companies in Uşak (TL)

2011 Turnover	No. Of Companies
- 150.000	420
150.000 – 500.000	387
500.000-1.000.000	130
1.000.000 – 2.000.000	122
2.000.000-5.000.000	122
+ 5.000.000	119

The enterprises with higher turnover rates are generally operating in fuel, mining & mine products, textile and leather sectors in Uşak.

Problems of the Enterprises

The survey included a question regarding the most significant problems that the companies face in Uşak which was responded by a vast majority of the enterprises as are ‘unable to find qualified workers’. The list of problems by ranking are provided in the below table

Ranking	Problem
1	Unable to find qualified workers
2	Providing cash flow
3	Taxes
4	Financing
5	Employment Costs
6	Administrative Regulations and Practices
7	Product Pricing
8	Advertising and Promotion
9	Settlements and Infrastructure
10	Environmental Issues
11	Purchase, quality and Supply of the Goods
12	Access to Marketing Opportunities
13	Sales and Marketing
14	Low Quality Standards
15	Lack of Market Research and Studies

16	Carriage and Distribution
17	Machinery and Fittings
18	Participation to Fairs and Other Activities
19	Access to Market Information
20	Labor Unions and Labor Law Practices
21	Technologic Developments
22	Other
23	Process Improvement
24	Productivity

All the sectors in Uşak are facing problems in finding qualified workforce for their enterprises. This problem is regarded to be of highest importance for almost all sectors. A table presenting the ranking of this problem by different sectors in Uşak is given below. As it can be seen from the table, the only sector that finding qualified workforce is not ranked within the first three problems of the sector is agricultural activities and husbandry sector.

Sector	Ranking of the Problem
Construction	1 st
Textile	1 st
Food	3 rd
Services	2 nd
Leather	1 st
Finance and Insurance	2 nd
Machinery, Electricity, Electronics	1 st
Logistics	2 nd
Automotive and Spare Parts	1 st
Chemicals and Chemical Products	2 nd
Furniture and Wood Products	1 st
Information and Communication	2 nd
Mining and Mine Products	1 st
Fuel	3 rd
Agricultural Activities and Husbandry	4 th
Durable Consumer Products	2 nd

Occupations identified as Problematic in finding Relevant Workforce

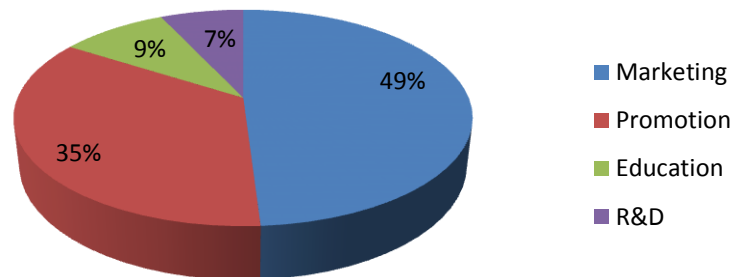
In terms of finding the needed employees with specific occupations, some occupations stand out. Below table presents the ranking shares of occupations which are identified as problematic in finding relevant workforce in Uşak:

Ranking	Occupation	%
1	Nurse	47
2	Blue Collar Worker (General)	24
3	Welder	24
4	Liquid Fuel Sales Staff	2,5
5	Agricultural Engineer	2,5

Items Included to Company Budget (Promotion, R&D, Education, Marketing)

The Survey included a question as ‘Which following item is included to your company budget? The cost items are listed as: promotion, R&D, Education and Marketing. Companies were allowed to select more than one item. The share of commercial enterprises which replied that the cost item is included in their company budget is given below.

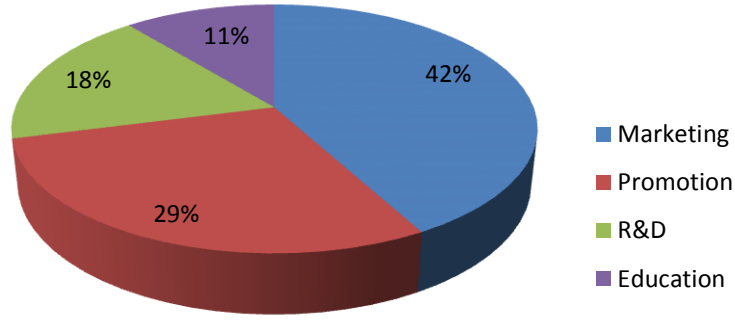
**Selected Cost Items for Commercial Enterprises /
Uşak**



Among the given cost items, the enterprises in Uşak often allocates budget for marketing and promotion activities but few companies allocate budget for education and R&D activities. Since there are mostly micro-scale enterprises in Uşak, this result represents that companies are trying to sustain their businesses rather than making efforts towards institutionalization. Awareness on the benefits of education and R&D activities to companies and to regional economy should be raised.

The results of the production companies are very similar. The highest shares belong to marketing and promotion activities. R&D activities are more often included in the company budget when compared with commercial enterprises, however not at required levels. Below chart presents the results from the companies involved in production.

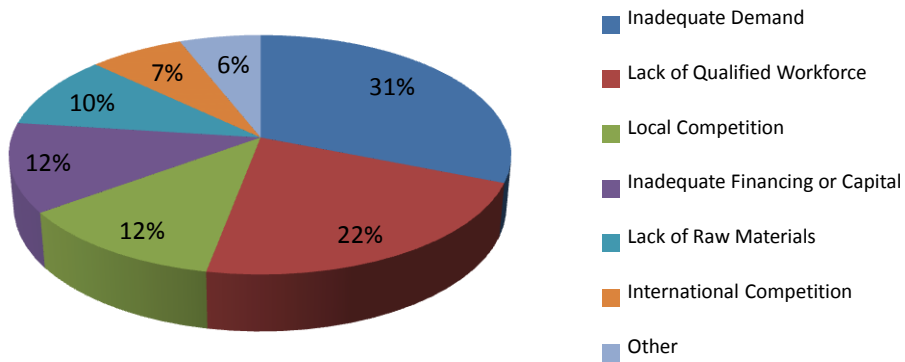
Selected Cost Items for Production Enterprises / Uşak



The Main Causes of Low Capacity Utilization for Production Enterprises

According to survey results the causes for low capacity utilization for production enterprises in Uşak two causes stand out. These are inadequate demand and the lack of qualified workforce.

Causes of Low-Capacity Utilization / Uşak



For some sectors the main cause of low capacity utilization for production companies were found as the lack of qualified workforce. These sectors are: textile, services, logistics, mining and mine products. This result highlights that the need for qualified workforce is particularly significant for the given sectors and more cooperation with the university, higher schools and vocational education and training facilities should be strengthened.

Top Ten Export Products

Top ten export products in Uşak is given in the below table.

Ranking	Product	No. Of Exporting Companies
1	Yarn	39
2	Leather	25
3	Machine and Machinery Equipment	16
4	Blanket	15
5	Helva, Tahin (Traditional Foods), Opium Poppy	12
6	Carpets	10
7	Chemical Goods	9
8	Confection	9
9	Ceramics	7
10	Woven Fabric	5

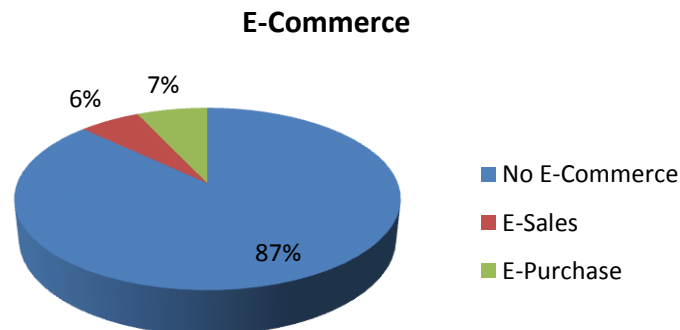
Top Ten Import Products

Top ten import products in Uşak is given in the below table.

Ranking	Product	No. Of Importing Companies
1	Textile Fibers and Clippings	33
2	Chemical Materials and Paint	30
3	Raw and Chrome Tanned Leather	27
4	Machine, Machine Equipment, Spare Parts	17
5	PVC, Rubber, Plastic Bags	7
6	Yarn Types	5
7	Wool	5
8	Sesame	2
9	Marble, Granite	2
10	Coal	2

E – Commerce

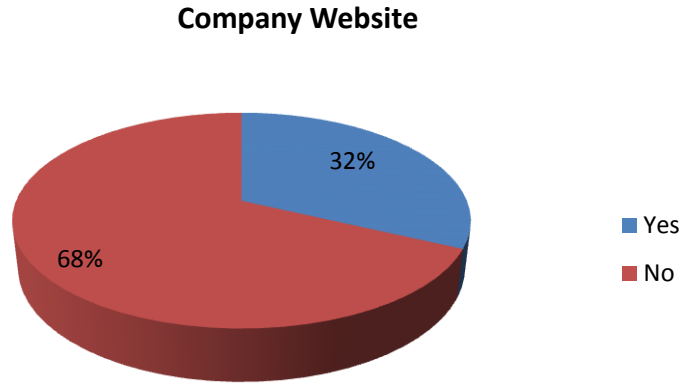
According to the survey results, the vast majority of companies in Uşak are not involved in e-commerce. A vast majority of the companies state that they are not doing e-commerce. Below graph presents the survey results on e-commerce activities of companies in Uşak.



It must be noted that companies doing e-sales and e-purchases are mostly the same.

Company Website

According to survey results, 68% of the companies in Uşak don't have a company website. The only sector which the number of companies with a website is higher than 50% is information and communication sector. The graph below presents the share of companies in Uşak having a website.



Outsourced Support Services in Last Year

The leading support services that the companies in Uşak provided from outside the company includes accounting and finance, website and brochure design, advertisement and public relations. Except accounting and finance services, the results are in line with other survey results since marketing and promotion activities took an important place in cost items of companies in Uşak. The list of outsourced support services in previous year by companies are given in the below table.

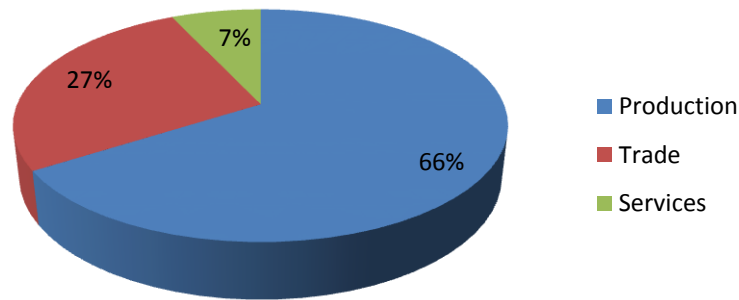
Ranking	Support Service Area
1	Accounting and Finance
2	Website or Brochure Design
3	Advertisement and Public Relations
4	Computer Operating Systems
5	Machinery Maintenance
6	Education
7	Quality and Certification
8	Sales and Distribution
9	Business Management Consultancy
10	Human Resources / Job Hunting
11	Other

AFYONKARAHİSAR

Companies by Nature:

According to the survey results; the distribution of companies by nature in Afyonkarahisar reflects an unbalanced situation. The share of enterprises doing production is higher than commercial and service sector enterprises. It is therefore needed to reach to a more balanced distribution for the benefit of the local economy.

Companies by Nature / Afyonkarahisar



Breakdown of Companies by Sectors :

According to the survey results the important sectors in Afyonkarahisar can be listed as: Meat Products, Sugar Candy Manufacturing, Turkish delight and Pişmaniye⁸⁹, Dairy Products, Cream, Local Cheese Production, Forestry Products, Flour Manufacturing, Egg Production.

Breakdown of Companies by Sub-Sectors

The results of the survey reveal that the main sub-sectors within the respondent companies in Afyonkarahisar is: Fuel, Waste Oils, Recycling, Construction Materials, Construction, Wholesale Food Sale, Local Cheese and Yogurt, Hotel Management, Animal Feed, Agriculture.

Distribution of Employees by Sectors

The distribution of employees by top sectors is given below. Top 16 sectors constitute 95,1% of employees in Afyonkarahisar. Other sectors include less than 1 % of the total employees. Some of these sectors can be counted as: production and distribution of electricity, gas, steam and hot water; manufacturing of wooden products; manufacturing of main metal and fabricated metal products; manufacturing of chemicals, chemical products and artificial fibres; manufacturing of paper, paper products and paper pulp etc.

⁸⁹ A Traditional desert

Sectors	% Total Employees
Other Social, Communal and Personal Services	18,4
Production of Food, Beverages and Tobacco	12,1
Manufacturing of Non-Metallic Other Minerals	9,2
Wholesale and Retail Trade	8,9
Textile and Manufacturing of Textile Products	7,9
Hotels and Restaurants	6,5
Construction	5,9
Other Manufacturing Activities	5,7
Public Administration and Defence, Social Security	4,2
Transportation, Storage and Communication	3,5
Activities of Financial Intermediates	3,1
Education	2,4
Manufacturing of Machinery and Equipment	2,2
Mining (except energy production)	1,8
Agriculture, Hunting and Forestry	1,7
Health and Social Services	1,6
Others	4,9

Distribution of Employees by Occupation

According to the results, the distribution of employees by occupations is given below. Top 22 occupations constitute 83 % of the total; and others, which are not included to the table, constitute less than 1 % percentage each. Some of these occupations can be counted as: confection workers, rubber products manufacturing workers, drivers, computer operators, tourism and hotel managers and staff, cashiers, shoe manufacturing workers, miners, security staff, automotive maintenance and repair workers, other motor vehicle repairmen and machinists, associate cooks, etc...

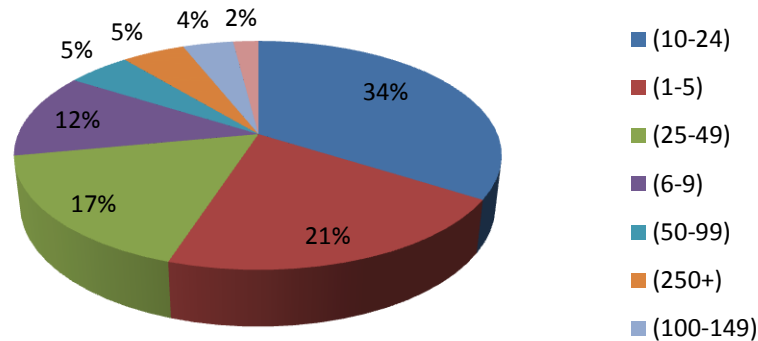
Occupation	% Total Employees
Blue-collar worker (General)	33
Cleaning Workers	12
Other Mining and Stone Quarrying Workers	4,8
Customer Services Officer	3,5
Sales Staff (Advertisement)	3,3
Marble Labourer	3,2
Banking Staff	2,8
Other Manufacturing Labourers (Machine)	2
Other Sewing and Embroidery Workers	1,7
Office Staff	1,6
Office Machinery Maintenance and Repair Workers	1,6

Waiters	1,5
Blue Collar Worker (Construction)	1,4
Injection Press Casting Machinery Operator	1,3
Sewing Machine Operator (Fabric)	1,3
Other Building Keepers	1,3
Beverages and Food Workers	1,2
Other Services Labourers	1,2
Other Yarn Labourers and Coilers	1,1
Other Carriage Workers	1,1
Communication Installation Maintenance and Repair Workers	1,1
Marble Block Cutting Operators	1

Enterprises by the Number of Employees

According to the survey results on the number of the employees by enterprises, the highest share belong to companies employing 10 to 24 workers, followed by companies employing 1-5 and 25 - 49 workers. When compared with enterprises of Uşak, a more suitable environment towards an institutionalized company management exists in Afyonkarahisar since the majority of the companies employ more than 10 workers.

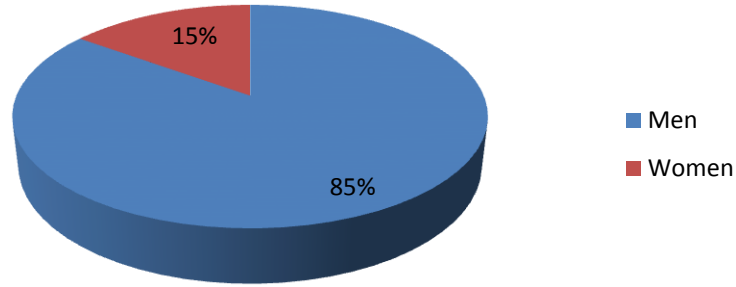
**Enterprises by the Number of Employees /
Afyonkarahisar**



Enterprises by Employee Demographics

According to the results, the number of female employees is almost 6 times less than male employees in Afyonkarahisar. The gap between male and female workers in Afyonkarahisar appears to be more significant than Uşak. This gap should be taken into account and female employment issue should be effectively included to forthcoming projects, supports and incentives in the region.

Enterprises by Employee Demographics / Afyonkarahisar



The Annual Turnover

In terms of annual turnover, the survey results present that there is a more balanced distribution in Afyonkarahisar compared with Uşak.

2011 Turnover	No. Of Companies
- 150.000 TL	14
150.000 – 500.000 TL	22
500.000-1.000.000 TL	10
1.000.000 – 2.000.000 TL	13
2.000.000-5.000.000 TL	16
+ 5.000.000 TL	21

The number of enterprises with 150.000 – 500.000 TL and over 5.000.000 TL is slightly over than the other segments. Both segments had an increasing trend compared with the previous year. Other segments remained within the same levels, except 500.000-1.000.000 TL segment.

Problems of the Enterprises

The survey included a question regarding the most significant problems that the companies face in Afyonkarahisar which was responded by a vast majority of the enterprises as are 'unable to find qualified workers'. The list of problems are provided in the below table by their ranking. Majority of companies in Afyonkarahisar is experiencing problems in finding qualified workforce for their operations, just as in Uşak.

Ranking	Problem
1	Unable to find qualified workers
2	Taxes
3	Providing cash flow
4	Financing
5	Employment Costs

6	Product Pricing
7	Environmental Issues
8	Purchase, Quality and Supply of the Goods
9	Administrative Regulations and Practices
10	Access to Marketing Opportunities
11	Machinery and Fittings
12	Carriage and Distribution
13	Sales and Marketing
14	Settlements and Infrastructure
15	Participation to Fairs and Other Activities
16	Low Quality Standards
17	Packaging and Labeling
18	Productivity
19	Advertisement and Promotion
20	Labor Unions and Labor Law Practices

Occupations identified as Problematic in finding Relevant Workforce

In terms of finding the needed employees with specific occupations, some occupations stand out. Below table presents the ranking shares occupations which are identified as problematic in finding relevant workforce in Afyonkarahisar:

Ranking	Occupation	%
1	Marble Labourer	50
2	Motor Technician	10,8
3	Tourism and Hotel Management Staff	10,8
4	Blue-collar worker (Cleaning)	6,5
5	Marketing Staff (Sales Representative)	6,5
6	Mapping technician	4,4
7	Cook	2,2
8	Mapping Technician	2,2
9	Secretary	2,2
10	Lathe Operator	2,2
11	Pre-Accounting Staff	2,2

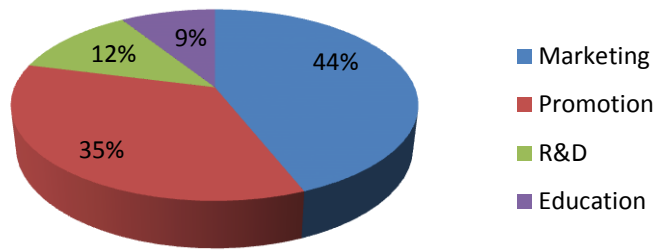
Items Included to Company Budget (Promotion, R&D, Education, Marketing)

The survey question regarding the budget allocation to given cost items had a low feedback from commercial enterprises in Afyonkarahisar. According to results, around 75% of the companies allocate budget for marketing activities while 25% of them allocate budget for promotion activities. None of the companies stated that they have a budget dedicated for R&D or education activities. Although it can be said that this result doesn't reflect the exact situation in Afyonkarahisar, it

presents a general trend that commercial companies are not allocating adequate resources for education and R&D activities.

The results from production companies in Afyonkarahisar show similarities with production companies in Afyon. Although still not at required levels, production companies in Afyonkarahisar allocate budget for education and R&D activities.

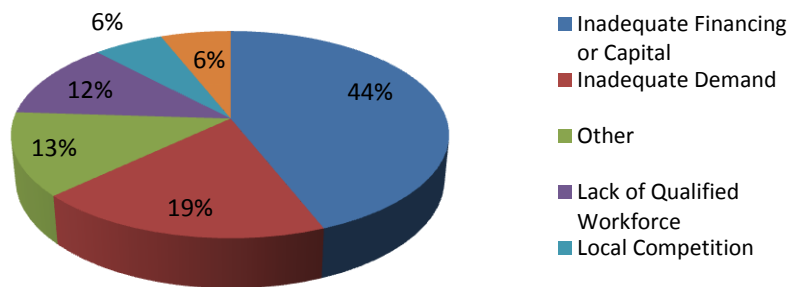
Selected Cost Items / Afyonkarahisar



The Main Causes of Low Capacity Utilization for Production Enterprises

According to survey results, the main cause low-capacity utilization of production enterprises in Afyonkarahisar is inadequate financing or capital. No company assessed lack of raw materials as a cause for low-capacity utilization.

Causes of Low-Capacity Utilization / Afyonkarahisar



Compared with the survey results of Uşak, lack of qualified workforce in Afyonkarahisar is regarded as less important by the enterprises in terms of capacity utilization.

Top Ten Export Products

Top ten export products in Afyonkarahisar are given below:

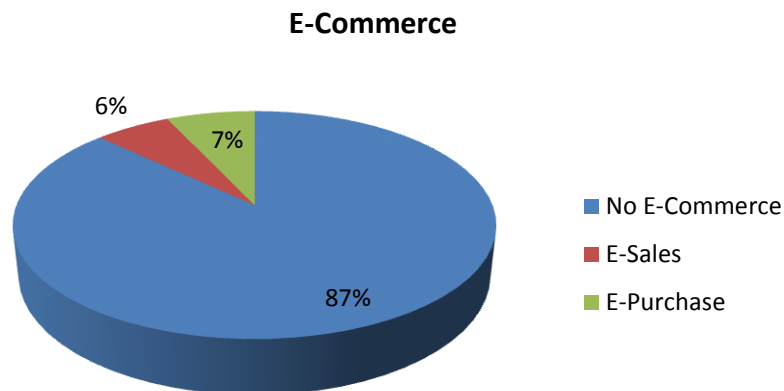
Ranking	Product
1	Marble
2	Meat and Meat Products
3	Sugar Candy
4	Machinery
5	Tahin, Helva (Traditional Foods) Poppy Paste
6	Milk and Dairy Products
7	Mineral Water
8	Textile, Confection
9	Eggs
10	-

Main Import Products

According to the results, the main products that are imported to Afyonkarahisar include lube oil, chemical raw materials, machinery and granite.

E – Commerce

According to the survey results, the vast majority of companies in Afyonkarahisar are not involved in e-commerce. While 87% of companies who had participated the survey stated that they are not involved in e-commerce, only 7 % of companies declared that they are involved in e-purchase operations while 6% of companies stated that they are involved in e-sales. When it is considered that companies doing e-sales and e-purchases are mostly the same, the minority of the companies involved in e-commerce turns up to be very low. The below graph presents the survey results on e-commerce activities of companies in Afyonkarahisar.



Company Website

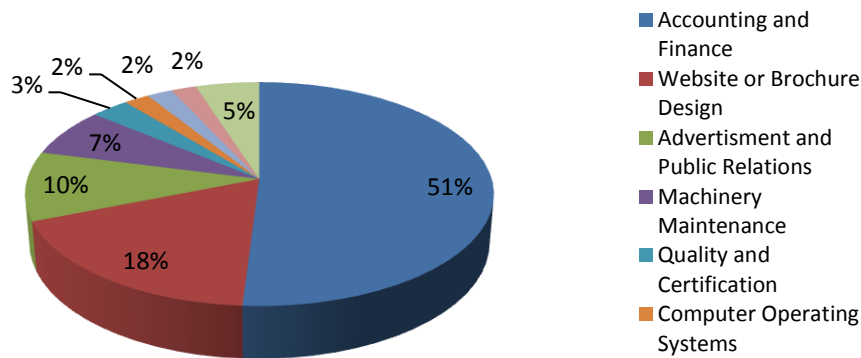
According to survey results, 62% of the companies in Afyonkarahisar have a company website, while 38% of the companies don't. Although the number of companies with a website may not be at the required levels in Afyonkarahisar, the results reflect a better position than Uşak.

Outsourced Support Services in Last Year

The leading support services that the companies in Afyonkarahisar provided from outside the company includes accounting and finance, website and brochure design, advertisement and public relations. The list of outsourced support services in previous year by the number of companies are given below:

Ranking	Support Service Area
1	Accounting and Finance
2	Website or Brochure Design
3	Advertisement and Public Relations
4	Machinery Maintenance
5	Computer Operating Systems
6	Education
7	Quality and Certification
8	Business Management Consultancy
9	Other
10	Sales and Distribution
11	Human Resources / Job Hunting

Outsourced Support Services / Afyonkarahisar



KÜTAHYA

Breakdown of Companies in Kütahya by Sectors

Sector	%	Sector	%
Wholesale and Retail Trade	15,5	Health and Social Services	1,9
Public Administration & Security, Social Security	11,5	Financial Intermediation Institutions	1,7
Other Services	11,3	Manufacturing of Wood Products	1,7
Construction	7	Manufacturing of Machinery & Equipment	1,5
Food, Beverages & Tobacco Production	7	Manufacturing of Plastic & Rubber products	0,7
Transportation, Storing and Communication	5,3	Real Estate - Renting	0,7
Agriculture, Hunting and Forestry	5	Production & Distribution of Electricity, Gas, Steam and Hot Water	0,7
Mining and Quarrying (ex. energy production)	4,4	Manufacturing of Electric & Optical Hardware	0,7
Other non-metallic mineral products	4,2	Manufacturing of Chemicals & Products and Artificial Fibers	0,5
Other Manufacturing not classified elsewhere	4,2	Manufacturing of Coking Coal, Refined Petroleum Products	0,5
Hotels and Restaurants	3,8	Manufacturing of Metals & Metal Products	0,5
Education	3,8	Manufacturing of Paper & Products, Paper Pulp	0,3
Mining and Quarrying (energy production)	2,8	Manufacturing of Transport Vehicles	0,3
Textile and Textile Products	2,2	Fishing	0,3

Distribution of Employees by Sectors

The distribution of employees by top sectors in Kütahya is given below. Top 20 sectors constitute around 95,8% of employees in Kütahya. Other sectors include less than 1 % of the total employees. Some of these sectors can be counted as: production and distribution of electricity, gas, steam and hot water; manufacturing of wooden products; manufacturing of plastic and rubber products; manufacturing of wood products, manufacturing of machinery and equipment; manufacturing of metals and metal products; manufacturing of paper, paper products and paper pulp etc...

Sector	% Total Employees
Other non-metallic mineral products	18,7
Mining and Quarrying (ex. energy production)	9,5
Mining and Quarrying (energy production)	7,5
Wholesale and Retail Trade	7,4
Food, Beverages & Tobacco Production	5,6
Public Administration & Security, Social Security	5,4
Construction	4,6
Other Manufacturing not classified elsewhere	4,2
Other Services	4,2
Education	4

Production and Distribution of Electricity, Gas, Steam and Hot Water	3,9
Manufacturing of Transport Vehicles	3,6
Transportation, Storing and Communication	3,1
Agriculture, Hunting and Forestry	2,8
Hotels and Restaurants	2,6
Textile and Textile Products	2,4
Financial Intermediation Institutions	2,1
Health and Social Services	2
Manufacturing of Chemicals & Products and Artificial Fibre	1,2
Real Estate - Leasing	1

Distribution of Employees by Occupation

According to the results, the distribution of employees by occupations is given below. Top 25 occupations constitute around 85 % of the total employees; and other occupations constitute less than 1 % percentage each in terms of the number of employees. Some of these occupations can be counted as: computer operators; tiles processors; retail sales workers, hospital cleaning staff, office workers, blue-collar worker (building construction); natural gas fitters; pottery and porcelain shaping workers; machinery repair and maintenance workers, etc.

Top 25 Occupations in Kütahya by the percentage of employees

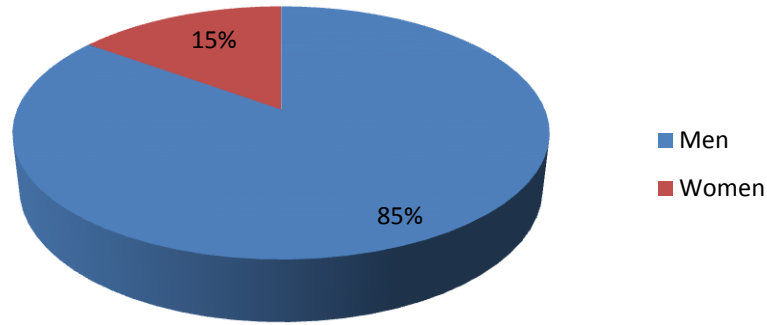
Occupation	% Total Employees
Blue Collar Worker (General)	21,8
Porcelain and Ceramics Products Worker	16,1
Miner (General)	6,6
Electrician (Other)	4,1
Other Mineral Processors	3,1
Glass Products Craftsman	3,1
Other Miners and Quarrying Workers	2,3
Driver (Freight)	2,3
Banking Staff	2,3
Teachers (Other)	2,2
Office Staff	2,2
Cleaning Staff	2,2
Rough Construction Workers	1,8
Car Furnisher	1,8
Forest Worker	1,4
Metal Casting	1,4
Other Sugar Processing Workers	1,3
Blue Collar Worker (Construction)	1,3

Sewing Machine Operator	1,2
Sales Staff	1,2
Ceramics and Tiles Technician	1,1
Garbagemen	1
Other Communication and Registration Workers	1
Dairy Worker	1
Mechanic Maintenance and Repair Worker	1

Enterprises by Employee Demographics

According to the results, the number of female employees in Kütahya is almost 6 times less than male employees in Uşak. This gap should be taken into account and female employment issue should be effectively included to forthcoming projects, supports and incentives in the region.

Enterprises by Employee Demographics / Kütahya



Occupations Identified as Problematic in finding Relevant Workforce

In terms of finding the needed employees with specific occupations, some occupations stand out. Below table presents the ranking shares of the occupations which are identified as problematic in finding relevant workforce in Kütahya:

Ranking	Occupation	%
1	Blue-Collar Workers (General)	52
2	Nurse	24
3	Dairy Worker	9
4	Electric Technician	3
5	Chemical Engineer	3
6	Accounting Asistant Staff (Book Keeping)	3
7	Accountant	3
8	Pre-Accountant	3

Problems of the Enterprises

The survey included a question regarding the most significant problems that the companies face in Kütahya which was responded by a vast majority of the enterprises as are 'unable to find qualified workers'. The reasons behind not being able to find qualified workers are noted as: the lack of human resource in the specific profession, lack of necessary professional skills; and, lack of sufficient work experience.

6. Conclusions

The project 'Bridges for Vocational Training between Germany and Turkey' was initiated by Uşak Chamber of Industry and Trade (UCIT) in order to improve Vocational Education and Training (VET) in the region and benefit from the knowledge and experience of Chambers in Germany on VET systems. The project will be implemented for the duration of 12 months. Specific objectives of the project are listed as: strengthening the institutional capacity of chambers Uşak, Kütahya and Afyonkarahisar in the field of vocational training by transfer of knowledge from the chambers in Germany; and, ensuring a stronger awareness of the opportunities and challenges of EU accession of Turkey in the field of vocational training.

This needs assessment study has been prepared in line with the project activity plan. The report therefore aimed to understand and reveal the current situation and the needs for vocational training in the region including relevant parties such as schools, universities, public institutions (like ISKUR), SMEs and the chambers. The findings of this study will support efficient implementation of further project activities including the design of trainings' content; and, also it will present a solid background for design of the model for vocational training center to be established.

The first part of this report includes a short description of the project and the main objectives of the project together with the role of the chambers.

Second part of the study is dedicated to the VET system in Turkey and main policy aspects of the country are presented through main policy documents. Moreover, information on previous and current VET projects is provided. With this regard, it can be seen that Turkey is going through an awareness and concentration process in terms of VET system in the country. The main reason behind is Turkey's high and young population which has considerably weak links to business sectors and industries. Moreover, existing vocational education and training opportunities need modernization in line with new developments in science and technology. This focus has become even more significant, particularly following the announcement of the EU candidate country status for Turkey and the opening of negotiations which accelerated the efforts for improving the VET system in Turkey since Turkey is now going through a harmonization process with the relevant EU legislation and eligible for more funding opportunities.

Third part of the study presents the current socio-economic status of the project provinces together with recent trends in education and employment. Uşak, Afyonkarahisar and Kütahya provinces are both located in the central part of the Aegean Region and constitute approximately 2% of Turkey's population. The population of the provinces shows a decreasing trend since the annual growth rate

of population is lower than Turkey averages in each province and outbound migration levels are higher than inbound levels. The outward population trends in the region indicate that people are seeking better socio-economic environments.

Agriculture and animal husbandry took important place in the economies of Uşak, Afyonkarahisar and Kütahya. In terms of industry, manufacturing sector takes the lead. In Uşak, textile and leather sectors has a pioneering position. Marble production and products is significant in Afyonkarahisar while one of the main economic resources in Kütahya is its worldwide famous tiles and ceramics. Moreover, thermal energy potential of the region is very high, particularly in Afyonkarahisar and Kütahya signing many opportunities both in terms of agriculture and thermal tourism.

In terms of exports, three project provinces have lower shares when compared with the other provinces in the Aegean region, especially İzmir and Manisa. Both provinces are relatively in proximity to the Port of İzmir, which is known to be the exporting gate of the country. Therefore, there is significant room for improvement in foreign trade of three project provinces when the industries are efficiently supported with qualified workforce.

In terms of education, the Aegean region is generally considered to have advanced schooling rates compared to many other parts of Turkey. When it comes to vocational education and training, an important increase in the number of VET students and improvement of VET perception in the region can be observed. For the period 2000-2012 the enrollment ratio of vocational and technical secondary school students and participation of girls to these schools in project provinces significantly increased. Within the given period, while the share of vocational and technical secondary school students increased from 18,93% to 40,68% throughout the country; in TR33 region including Afyon, Manisa, Kütahya and Uşak, it increased from 19,10% to 49,20% . Also there is one university in each province, including VET higher schools which mainly provide the necessary staff and technician capacity of industrial sectors and 4-year faculties, providing the teacher capacity of VET schools.

The final topic of the third part is devoted to the workforce and employment trends in the region and the comparison with Turkey averages. According to the 2011 numbers, Turkey's workforce was calculated as 26.725.000 people. While 24.110.000 of the workforce was employed, 2.615.000 was identified as unemployed, constituting an unemployment rate of 9,8%. Services sector has a leading position in terms of providing jobs followed by agriculture, but with a decreasing trend. When educational background of the workforce is analyzed in detail, it can be seen that although the workforce participation rate is not at desired levels for VET graduates, they have the lowest shares within unemployed population.

Afyonkarahisar, Uşak and Kütahya provinces both have lower unemployment rates than total Turkey averages. In terms of age, although slight differences can be observed between each province, generally young population around the ages of 20-40 has higher unemployment rates in the project provinces, as in Turkey. Only in Uşak, the age groups do not reflect a significant variation. A similar trend also can be observed in the educational backgrounds of the unemployed population. The highest shares belong to the graduates of primary or secondary (high school level) education. This explains that the vast majority of unemployed people in the project provinces are looking for a job that requires 'no specific qualification'.

The report includes a comparative study with Turkey and selected countries around the world, in part four. Since the developments in the VET system and policies in Turkey is partly linked to the EU equivalents due to the harmonization process ongoing with the EU, specific importance is given to European countries and recent developments in the relevant EU policies.

In order to better assess the information and data gathered from the project provinces, a survey study for the companies has been conducted in Uşak and Afyonkarahisar through the Chambers of Trade and Industry. In consultation with Uşak Chamber of Trade and Industry and the regional stakeholders; the results of the survey are assessed and analyzed together with a recently conducted survey of the Chamber. The results of the work are presented in part five. Although the participation rate to the survey varies in provinces, the results are capable of reflecting the current situation and the problems faced by the enterprises in the region. Companies are mainly questioned on the nature of their operations and products, the number and gender of employees, turnover, main problems faced, selected items allocated in the company budget(education, R&D, promotion and marketing), the causes for low capacity utilization in the production companies, foreign trade, e-commerce, the use of websites and outsourced support activities by the company. The questions are designed in order to reveal the main economic activities and sectors that the companies operate and the employees are recruited, trends in occupational needs of the regions, companies' export potentials, existing efforts towards better and more productive operations; and to reach workable solutions by the determination of common problems that companies face during their operations.

According to survey results most of the enterprises in Uşak are micro-scale companies with less than 5 employees. Textile sector has a leading position both in terms of the number of companies involved and in providing jobs. The majority of the companies has less than 500.000 TL annual turnover. In Afyonkarahisar, most of the companies have 10-24 people, followed by companies with less than 5 workers. In terms of annual turnover, the survey results present that there is a more balanced distribution in Afyonkarahisar compared with Uşak.

Most of the prominent results for both provinces are in common. First of all, the number of female workers is significantly lower than male workers in both provinces. The problem is even more severe in Afyonkarahisar and Kütahya. There are some important export products for both provinces, but there is enough room for improvement. Also, the vast majority of companies in the provinces are not involved in e-commerce in the region. E-commerce is widely used in today's business world and it can be an easy and fast solution for the regional competitiveness in terms of both internal and external trade, once applied with skilled workers. Another relevant result was identified in terms of the use of websites.

The regional companies mostly do not have a company website and are not completely using the opportunities of new technology. Supporting companies on these topics can allow companies to open their operations to the domestic and international markets.

The survey included a question regarding the most significant problems that the companies face in the provinces which was responded by a vast majority of the enterprises as are 'unable to find qualified workers'. These results sign a significant gap in the relationship of VET education institutions and the industry. The information provided in the previous parts of the report shows that the region do not suffer from the existence of VET education. However, the quality of the education needs to be increased by the modernization of the facilities and more relevant subjects should be included to the education problem in line with the existing industries and sectors in the region. Also, training opportunities for VET students in the industries should be increased.

Another important result is that regional companies do not allocate enough budget to education and R&D activities. Awareness on the benefits of continuing R&D activities and education of the workers should be increased. Also, more training opportunities for VET students in the companies can fill the gap here, by the employment of trainees after the successful completion of their theoretical and practical education.

The lack of qualified workforce problem is also regarded as one of the main causes of low capacity utilization in production companies, especially in Uşak where it is defined as the main cause for some sectors. These sectors are: textile, services, logistics, mining and mine products. This result highlights that the need for qualified workforce is particularly significant for the given sectors and more cooperation with the university, higher schools and vocational education and training facilities should be strengthened.

Finally, prominent results according to the findings of this study can be listed as below:

- VET opportunities for women should be increased

- VET opportunities for Primary and Secondary Education graduates should be increased
- Awareness and better perception of VET education should be strengthened
- Education, University, Industry links should be strengthened in terms of VET
- Chambers should be more active in the organization and provision of VET activities including the trainee-company arrangements and the provision of more VET opportunities through the VET centers to be established
- More opportunities in career guidance should be provided; Chambers may get involved in this process and strengthen cooperation with institutions such as ISKUR
- VET curriculums and programs should be revised and promoted in accordance with the needed human resource in the region.