

**JUST TRANSITION AND REGIONAL
EMPLOYMENT: POLICY CHOICES
FOR TÜRKİYE**

About SHURA Energy Transition Center

SHURA Energy Transition Center, founded by the European Climate Foundation (ECF), Agora Energiewende, and Istanbul Policy Center (IPC) at Sabancı University, contributes to the decarbonisation of the energy sector via an innovative energy transition platform. It caters to the need for a sustainable and broadly recognized platform for discussions on technological, economic, and policy aspects of Türkiye's energy sector. SHURA supports the debate on the transition to a low-carbon energy system through energy efficiency and renewable energy by using fact-based analysis and the best available data. Taking into account all relevant perspectives by a multitude of stakeholders, it contributes to an enhanced understanding of the economic potential, technical feasibility, and the relevant policy tools for this transition.

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Design

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This report and the assumptions made within the scope of the study have been drafted based on different scenarios and market conditions as of end-2023. Since these assumptions, scenarios, and the market conditions are subject to change, it is not warranted that the forecasts in this report will be the same as the actual figures. The institutions and the persons who have contributed to the preparation of this report cannot be held responsible for any commercial gains or losses that may arise from the divergence between the forecasts in the report and the actual values.

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Key Messages

- When the basic characteristics of employees in the main industries affected by the Carbon Border Adjustment Mechanism (CBAM) and coal mining are compared to the average worker in Türkiye and manufacturing industry averages, it appears that wages and the ratio of employees with vocational high school education in the affected industries are significantly higher than average, non-registered employment is low, and the unionization rate is relatively high.
- Considering the diversity in regional employment structure, economic activity, and demographic outlook, managing the effects of the transition on employment requires a regional approach. It is particularly important to develop distinct approaches in areas where the impacts are intensified by the presence of more than one of the relevant industries in the same region, especially in cases in which these industries have an important place in the regional economy with both direct and indirect impacts and for small settlements in which the industries have a high share of employment.
- The design of programs to facilitate skills transformation including the diversification of regional economic activities to increase employment and other support policies for those who are difficult to re-employ should be tailored to meet the needs of each region. In this context, it is important to develop financial resources, including emissions trading system (ETS) revenues and international cooperation, especially for employment incentives, training programs, early retirement, and other social support programs.
- The regional dimension of employment must be a part of all stages of the transition process, starting from an integrated planning phase that focuses on sustainable development. In this context, in addition to central government institutions, local governments, professional associations, non-governmental organizations, employer associations and trade unions, exporters, and large-scale companies, which are the main actors in the transition, should also take responsibility along their value chains.

Executive Summary

Among the most frequently discussed issues in the transition process related to decarbonization is the impact of this transition on employment and addressing this impact within the framework of a just transition. Although studies conducted to measure the socioeconomic effects of the transition show that the size of the impacts at the national level is small, such macro studies are not able to capture large-scale negative effects that may be experienced at the regional level. This study aims to measure the regional risks that the green transition will create for employment in the coal mining sector (including electricity generation) and other industries affected by the Carbon Border Adjustment Mechanism (CBAM) in order to develop relevant policy recommendations.

Employment Outlook and Characteristics on the National, Regional, Provincial and District Level

Türkiye's current employment strategy focuses on creating new employment opportunities through new investments in order to reduce unemployment. After Türkiye announced its net-zero carbon target in 2021, a just transition, especially its employment dimension, has become one of the focal points in policy documents and related studies. In this context, while initially the Green Deal Action Plan¹ published in 2021 did not include employment within the scope of a just transition, the Just Transition Policies Specialized Working Group² was later established in 2022 and is still functioning under the coordination of the Ministry of Labour and Social Security. The final report of the ministry's Climate Council,³ which convened in 2022, included decisions emphasizing "local employment", "decent employment", "social protection", and "employee welfare", associating employment policies with regional development. Recently published national plan documents such as the 12th Development Plan, which focuses on green and digital transformation, aim to establish just transition mechanisms so that employees are not negatively affected by the green transformation process.

In this study, a path extending from the country scale to the regional, provincial, and district scales has been created for CBAM and coal industries, based on the need for a situational assessment that can be scaled down to the district level to create effective policy recommendations. As a result of the analyses conducted using open data sources such as the Household Labour Force Surveys of the Turkish Statistical Institute (TURKSTAT) and the Ministry of Industry and Technology Enterprise Database System, the characteristics of employment and the number of jobs at risk due to the transition were estimated at the regional, provincial, and district levels for each industry

¹ <https://ticaret.gov.tr/data/60f1200013b876eb28421b23/MUTABAKAT%20YE%C5%9E%C4%B0L.pdf>

² <https://www.csgb.gov.tr/media/92453/agep-calisma-usul-ve-esaslari.pdf>

³ <https://www.csgb.gov.tr/media/92447/iklim-surasi-sonuc-bildirgesi.pdf>

examined. The most affected regions were determined taking into account all the sectors examined within the scope of this study.

According to the most recent, comprehensive 2021 data that was available at the time of review, 714,000 people are employed in the main sectors and product groups that will be affected in the first phase of CBAM and in hard coal and lignite mining. This figure can be regarded as an upper limit, since it also includes products, such as glass, ceramics, basic and processed chemicals, and basic metals other than iron and aluminium, which are not covered in the first phase of CBAM but will be included after 2030. The main CBAM sectors constitute 2.5% of Türkiye's total employment and 12.5% of manufacturing employment. Of this figure, an estimated 200,000 work in the specific sub-sectors covered in the first phase of CBAM (cement, iron and steel and fertilizers) and in coal and lignite mining.

When basic characteristics of employees in the main industries covered by CBAM and coal mining are compared to the average worker in Türkiye and manufacturing industry averages, it appears that wages in these industries are significantly higher than average, non-registered employment is low, and the unionization rate is relatively high. Although the average duration of schooling is close to or slightly above the 9.6-year average in Türkiye, the ratio of vocational high school graduates, that is those who received technical education, is significantly higher. Based on the International Standard of Classification of Occupations (ISCO), which analyses employment according to qualification groups wherein the qualification level of all employees is rated on a scale of 1-4 (1 the lowest, 4 the highest score), the qualification level of employment in CBAM industries is slightly below the average in Türkiye of 2.21. In addition to the nature of each job, ISCO also gives insights into the ease of adaptation of employees to alternative jobs. According to the international classification, which classifies occupations as routine, non-routine manual, and non-routine cognitive, the proportion of employees in routine jobs, which is quite high in coal mining and the main CBAM industries in Türkiye, is close to 60% (this ratio is 52% in the chemicals industry). Nevertheless, this ratio is lower than the 69.7% average in the Turkish manufacturing industry. Another unique characteristic of the coal mining and CBAM industries is the ratio of female employment, which is significantly lower than both the manufacturing industry and the general average in Türkiye. The share of female employment in these industries is 1.2%. Considering all these characteristics, it appears that the education and qualification levels of employees in these industries, including those working in routine jobs, are suitable for employment in other areas of the manufacturing industry. However, there is a risk that the new employment opportunities that will emerge within the scope of the transition will lag behind the existing jobs in these industries in terms of job security and income.

In order to scale the analysis down to the regional level and to determine the number of jobs at risk, the 26 regions included in the TURKSTAT Household Labour Force Survey were used. Thus, characteristics such as age, gender, education level, and field of work in both registered and non-registered employment could be evaluated for the main industries affected by CBAM (coal mining, basic metals industry, non-metallic minerals, and the chemicals industry) for relatively large regions, and the number of jobs at risk could be determined. While employment at risk includes total employment in coal mining, which may be completely phased out during the transition, for the CBAM industries whose production is expected to continue to grow, albeit at a slower pace, those working directly in production or in the carbon-intensive stages of production and employees over 45 years of age with a low level of education are deemed to be at risk.

The results of the regional analyses conducted reveal that on a sectoral basis, the following regions stand out:

- Coal and Lignite Mining Industry:
 - Zonguldak-Karabük-Bartın Region (TR81) – constitutes 4.15% of regional employment
 - Manisa-Afyonkarahisar-Kütahya-Uşak Region (TR33) – constitutes 1.09% of regional employment
- Iron-Steel and Aluminium⁴ (Basic Metals Industry):
 - Zonguldak-Karabük-Bartın Region (TR81) – constitutes 6.7% of regional employment
 - Hatay-Kahramanmaraş-Osmaniye Region (TR63) – constitutes 2.7% of regional employment
 - Kocaeli-Sakarya-Düzce-Bolu-Yalova Region (TR42) – constitutes 2.4% of regional employment
- Cement (Non-Metallic Minerals):
 - Hatay-Kahramanmaraş-Osmaniye Region (TR63) – since cement plants are spread all over the country, the predominant region is determined based on provincial and district analyses.
- Fertilizer (Chemicals):
 - Kocaeli-Sakarya-Düzce-Bolu-Yalova Region (TR42) – since fertilizers have a very low share in employment in the chemicals industry, provincial and district analyses were used to determine the predominant region.

As a result of these detailed regional studies, the total employment risk posed by the green transition in the regions most affected by CBAM industries is summarized in Table ES1. In all regions, the employment risk is calculated as approximately 35,000 people. In the worst-case scenario, if the entire

⁴ Since iron and steel are more predominant in the basic metals industry compared to aluminum, the results related to aluminum at the provincial and district levels are more significant than on the national level.

workforce working directly on the production line in these industries becomes unemployed, the employment risk is calculated as 124,000 people.

Table ES1. Estimated Employment at Risk

		Region Overall	Basic Metals Industry	Non-Metallic Minerals Industry
TR-63 Hatay-Kahramanmaraş-Osmaniye Region	Average Age	38.7	37.5	38.3
	Number of employees	957,200	25,813	62,550
	Unemployment rate (%)	17.1%		
	Proportion employed in the production line (%)		54.0%	79.2%
	Proportion employed in the production line who are over 45 years of age (%)		11.4%	28.9%
	Proportion impacted according to the BLS Occupational Classification		10%	10%
	<i>Employment at risk due to the transition (lower limit)</i>		2,581	6,255
	<i>Employment at risk due to the transition (upper limit)</i>		13,934	49,540
	<i>Number of employees that may be considered for early retirement</i>		2,938	18,071
	Employees over 45 years of age (%)	28.8%	20.9%	38%
	Employees with high school or lower education	74.6%	60.9%	91.0%
	Employees over 45 years of age with high school or lower education	25.3%	15.4%	36.30%
	<i>Employment at risk due to age and education (persons)</i>		3,962	22,706

		Region Overall	Basic Metals Industry	Chemicals
TR-42 Kocaeli-Sakarya-Düzce-Bolu-Yalova Region	Average Age	39.1	36.5	40.2
	Number of employees	1,500,000	34,800	16,000
	Unemployment rate (%)	9.6%		
	Proportion employed in the production line (%)		71.1%	52.2%
	Proportion employed in the production line who are over 45 years of age (%)		17.3%	9.6%
	Proportion impacted according to the BLS Occupational Classification		10%	10%
	<i>Employment at risk due to the transition (lower limit)</i>		3,480	1,600
	<i>Employment at risk due to the transition (upper limit)</i>		24,732	8,826
	<i>Number of employees that may be considered for early retirement</i>		6,003	1,538
	Employees over 45 years of age (%)	29.3%	24.83%	24.0%
	Employees with high school or lower education	73.52%	81.76%	60.3%
	Employees over 45 years of age with high school or lower education	25.4%	22.59%	18.7%
	<i>Employment at risk due to age and education (persons)</i>		7,861	2,986

		Region Overall	Coal and Lignite Mining	Basic Metals Industry
TR-81 Zonguldak-Karabük-Bartın Region	Average Age	42.2	37.7	39.7
	Number of employees	361,600	15,000	24,315
	Unemployment rate (%)	10.9%		
	Proportion employed in the production line (%)		84.3%	43.2%
	Proportion employed in the production line who are over 45 years of age (%)		16.1%	14.2%
	<i>Employment at risk due to the transition (lower limit)</i>		12,644	2,432
	<i>Employment at risk due to the transition (upper limit)</i>		15,000	10,502
	<i>Number of employees that may be considered for early retirement</i>		2,420	3,453
	Employees over 45 years of age (%)	35.3%	22.3%	35.0%
	Employees with high school or lower education	74.8%	89.3%	54.2%
	Employees over 45 years of age with high school or lower education	25.8%	19.4%	23.1%
	<i>Employment at risk due to age and education (persons)</i>		2,909	5,612

		Region Overall	Coal and Lignite Mining
TR-33 Manisa-Afyonkarahisar-Kütahya-Uşak Region	Average Age	40.7	37.2
	Number of employees	1,169,000	12,800
	Unemployment rate (%)	6.9%	
	Proportion employed in the production line (%)		58.1%
	Proportion employed in the production line who are over 45 years of age (%)		13.9%
	<i>Employment at risk due to the transition (lower limit)</i>		7,437
	<i>Employment at risk due to the transition (upper limit)</i>		12,800
	<i>Number of employees that may be considered for early retirement</i>		1,778
	Employees over 45 years of age (%)	32.7%	22.0%
	Employees with high school or lower education	80.8%	71.4%
	Employees over 45 years of age with high school or lower education	29.4%	21.5%
	<i>Employment at risk due to age and education (persons)</i>		2,749

Source: Authors' calculations using the TURKSTAT Household Labour Force Survey Micro Dataset, 2021

In the designated regions, every industry may not be affected in the same manner by CBAM and the strategies leading to the net-zero path; therefore, paying special attention to the regions where emissions-intensive industries are clustered is necessary during the policy setting process. In these regions, alternative employment policies in industries where a complete exit may be required, such as coal, and policies such as skills transformation/reskilling in industries that are expected to continue production with the introduction of new energy and production technologies should be considered together.

Apart from large regions, special attention should also be paid to smaller settlements where these industries are often the main source of livelihood. Another issue that should be taken into account is the regional economies that are formed around production: that is to say, the indirect effects can sometimes exceed the direct effects. This study attempts to specify direct and indirect employment in coal and lignite mining, iron ore mining, main iron and steel products, steel pipe profile and fittings manufacturing, iron and steel casting, fabricated metal products, aluminium, cement, and fertilizer sub-industries at the provincial and district level by using the Enterprise Database System of the Ministry of Industry. Indirect employment is defined as employment in organizations that provide input and services to the said sub-industries; this study identifies the provinces and districts where this employment is located. Prominent provinces and districts were determined based on the total share of the studied sub-industries in provincial and district employment; at the same time, the share of these provinces and districts in total employment in the sub-industry was taken into account.

In this context, it is important to note the provinces where more than one industry is prominent. For instance, Zonguldak stands out as a province with both prominent hard coal and iron and steel industries. Kocaeli is among the provinces in which some districts have a higher share of both direct and indirect employment in the iron-steel, aluminium, and fertilizer industries than the total share of the province as a whole. While the employment rate in these industries in Kocaeli corresponds to about 2% of general provincial employment, attention should be paid to employment concentration in districts such as Dilovası and Gebze. Bilecik, Karabük, Kırklareli, Konya, and Tekirdağ are among the provinces with a high concentration of employment in these industries, especially in the iron-steel and aluminium industries. Bartın and Kırklareli, on the other hand, have a relatively larger share of employment in the production of cement, limestone, and gypsum.

Table ES2. Provinces with a prominent share of direct and indirect employment in two or more of the industries covered by the CBAM

	Direct Employment								Indirect Employment							
	Lignite	Hard Coal	Iron	Steel	Aluminium	Fertilizer	Cement	Limestone and Gypsum	Lignite	Hard Coal	Iron	Steel	Aluminium	Fertilizer	Cement	Limestone and Gypsum
Adana																
Kocaeli																
Çorum																
Bartın																
Bilecik																
Bursa																
Karabük																
Hatay																
İzmir																
Düzce																
Osmaniye																
Kırklareli																
Konya																
Samsun																
Tekirdağ																
Zonguldak																

*The provinces included in the table are listed as the first ten provinces where employment in the relevant industries represents the highest share of total provincial employment. Thus, it was aimed to identify the provinces with a prominent direct and indirect employment share in more than one industry.

Source: Authors' calculations using the Ministry of Industry and Technology Entrepreneurial Information System Dataset, 2021

On the other hand, a large part of the employment in some districts is provided by the related sub-industries, and in some cases a single facility affects almost all district employment. Since the population of some districts in question is very small, there is no significant effect on the total employment figures; however, it is important to pay attention to the local effects. In this context, the districts with large coal and iron mining industries stand out. Developing alternative job opportunities and other support mechanisms in these districts should be considered a priority. Table ES2 shows the industries and districts with a share of 14% or more in district employment. The entire list of districts is included in Annex 1.

Table ES3. Districts with the highest share of direct employment in CBAM Industries

Province-District	The share of industry employment in district employment (%)	Industry
Sivas-Divriği	50	Iron Mining
İzmir-Kınık	47	Lignite Mining
Tokat-Artova	46	Cement
Sakarya-Karapürçek	45	Aluminium
Manisa-Soma	45	Lignite Mining
Eskişehir-Mihalıççık	34	Lignite Mining
Kilis-Polateli	32	Cement
Zonguldak-Kilimli	32	Coal Mining
Malatya-Hekimhan	30	Iron Mining
Bartın-Amasra	29	Coal Mining
Çorum-Dodurga	26	Coal Mining
Erzincan-Kemaliye	25	Iron Mining
Zonguldak-Merkez	23	Coal Mining
Ankara-Bala	22	Limestone and Gypsum
Kütahya-Domaniç	21	Lignite Mining
Ankara-Nallıhan	21	Lignite Mining
Konya-Seydişehir	19	Aluminium
Karabük Merkez	18	Iron and Steel
Elazığ-Baskil	18	Cement
Kayseri-Yahyalı	18	Iron Mining
Adana-Tufanbeyli	18	Lignite Mining
Kahramanmaraş-Afşin	18	Lignite Mining
Edirne-Lalapaşa	16	Cement
Tekirdağ-Malkara	14	Lignite Mining

Policy Recommendations

The proposed employment policies are discussed under three main headings: skills transformation, diversification of regional economic activities and increasing employment, and other support policies. Regional indicators were analysed to determine what kind of policies could be prioritized for which regions under each heading. The purpose here is to provide a reference in cases where prioritization is required under geographical

preference or budget constraints. In this regard, the policy proposals under the classified headings are summarized below.

Skills Transformation

Skills transformation and on-the-job training are especially recommended for industries such as the basic metals industry, cement, and fertilizer that will continue production but with some production stages expected to be phased out due to the green transformation. The following should be taken into account when planning skills transformation programs:

- Priority should be given to the working-age population,
- Special programs should be considered for low-educated employees who find it more difficult to acquire new skills,
- For low-educated employees who will be included in skill acquisition or other social support programs, the dependent population should also be taken into account, and families should also be included in protection programs if they are likely to be unemployed.

Regional Recommendations for Skills Transformation

- The Hatay-Kahramanmaraş-Osmaniye Region (TR63) stands out due to the share of those employed in the basic metals industry in the region's total employment. Thus, facilitating the transition of the employees with a higher level of education to new fields through skills transformation programs is deemed particularly suitable for this region. However, the current unemployment rates in the region may reduce the effectiveness of these programs.
- In the manufacturing of chemicals, the Kocaeli-Sakarya-Düzce-Bolu-Yalova region (TR42) is likely to benefit from skills transformation policies due to its relatively higher level of education in the existing workforce. In addition, due attention should be paid to this region as there are many different industries in this region existing together that require transformation at certain stages of production, such as iron and steel, aluminium, and fertilizer.
- In addition, provinces such as Bilecik, Karabük, Kırklareli, and Konya should be included in this list as they have a significant share in direct and indirect employment in the iron-steel and aluminium industries. Bartın and Kırklareli provinces, where the industries affected by CBAM also have a 20% or greater share in employment at the district level, and Tokat-Artova and Kilis-Polateli districts should be considered among the settlements with a large share in cement industry employment and may need skills transformation education.

Policies to Increase the Diversity of Economic Activity in the Regions and Support Employment

- It is important to plan and design regional support mechanisms for the creation of new employment areas in affected regions, especially for industries in which the entire industry will stop production within the scope of green transformation, such as in coal mining and electricity production from coal, or which may be negatively affected by the transformation even if production continues.
- Among the industries that will undergo transformation, the skill and education profiles of those currently employed in the basic metals industry, which includes coal and lignite mining, iron mining, iron-casting, steel casting, and aluminium industries, are most similar to the profiles of those working in the manufacturing industry. For those at risk of losing their jobs in the mentioned industries, tools such as insurance premium incentives and tax incentives can be developed to make it attractive for employers to employ these workers in alternative jobs.
- The Zonguldak-Karabük-Bartın (TR81) and Manisa-Afyonkarahisar-Kütahya-Uşak (TR33) regions stand out as regions where employment in coal mining has a significant share in regional employment. With the exit process from coal, 4.2% of the employment in the TR81 region and 1.1% in the TR 33 region may face the risk of losing their jobs. These rates, which are high compared to the total share of employees from these sectors in Türkiye, show that the development of new employment areas in these regions should be considered as a policy priority.
- In addition to these regions, settlements such as İzmir-Kınık, Eskişehir-Mihalıççık, Ankara-Nallıhan, Çorum-Laçın, and Tekirdağ-Malkara should also be added to this list due to the fact that the coal industry has a significant share in both direct and indirect employment in these districts.

Support Policies for Employees Who May Experience Difficulties with Re-Employment

In this context, for employees over the age of 45 and especially those with a low level of education, early retirement programs may be developed. There are an estimated 7,000-7,500 people nationally in the coal and lignite industry, 4,200-5,000 of whom are in the most impacted regions, who may be most affected by the green transformation process. However, in order to compensate for the loss of income that may occur with retirement, those between the ages of 45-60 should be offered the option of participating in retraining and job placement programs after retirement. In addition,

especially in areas with high unemployment rates, where there is a concentration of employees in the risk group (low skill/education level), as well as a high dependent population, social support policies should be implemented at the household scale. In order to develop financial resources for these programs, directing ETS revenues to this area within the scope of just transition support and the deployment of international financial resources should be put on the agenda.

The following regions stand out for possible implementation of social support policies, especially early retirement programs:

• TR81 (Zonguldak-Karabük-Bartın)	coal	2,420 people
• TR33 (Manisa-Afyonkarahisar-Kütahya-Uşak)	coal	1,778 people
• TR81 (Zonguldak-Karabük-Bartın)	basic metals	3,453 people
• TR 63 (Hatay-Kahramanmaraş-Osmaniye)	basic metals	2,938 people
• TR 42 (Kocaeli-Sakarya-Düzce-Bolu-Yalova)	basic metals	6,003 people

Conclusion

A holistic policy approach is needed for Türkiye to aim for sustainable development and adapt to net-zero carbon commitments and the green transformation that is occurring on a global scale. In particular, it is of great importance that the processes in the energy and industrial sectors are considered together with industrial, transportation, finance, and trade policies and carried out within the framework of just transition principles. Since the transition process has already started for reasons arising from market conditions and commitments, it is important to act quickly for comprehensive planning. In this context, it is important that these plans are not limited to the first phase of CBAM but should take into account the need for a far-reaching industrial transformation. Additionally, the regional dimension of employment should be included at every stage of the transition process, starting from the planning stage. The comprehensive policies set out in this report will only be possible with further extensive and all-encompassing studies with widespread participation. In this regard, relevant public institutions and organizations, especially the Ministry of Labor and Social Security, industrial and employer organizations, centralized unions and professional organizations, development agencies, local governments, Organized Industrial Zones (OIZs), and non-governmental organizations at the local level should be a part of the process.

About Istanbul Policy Center at Sabancı University

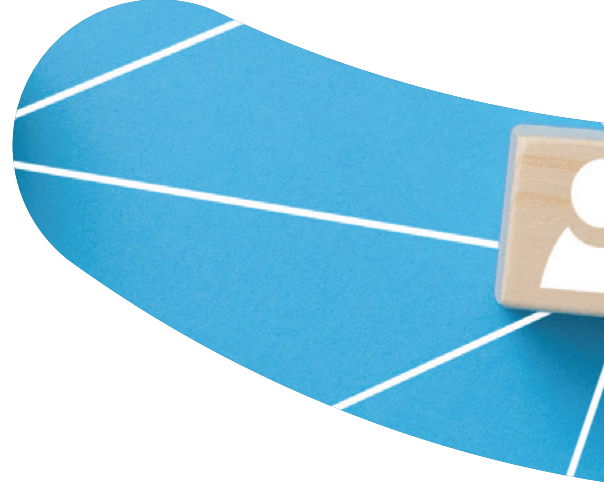
Istanbul Policy Center (IPC) is a global policy research institution that specializes in key social and political issues ranging from democratization to climate change, transatlantic relations to conflict resolution and mediation. IPC organizes and conducts its research under three main clusters: The Istanbul Policy Center-Sabancı University-Stiftung Mercator Initiative, Democratization and Institutional Reform, and Conflict Resolution and Mediation. Since 2001, IPC has provided decision makers, opinion leaders, and other major stakeholders with objective analyses and innovative policy recommendations.

About European Climate Foundation

The European Climate Foundation (ECF) was established as a major philanthropic initiative to help Europe foster the development of a low-carbon society and play an even stronger international leadership role to mitigate climate change. The ECF seeks to address the “how” of the low-carbon transition in a non-ideological manner. In collaboration with its partners, the ECF contributes to the debate by highlighting key path dependencies and the implications of different options in this transition.

About Agora Energiewende

Agora Energiewende develops evidence-based and politically viable strategies for ensuring the success of the clean energy transition in Germany, Europe and the rest of the world. As a think tank and policy laboratory, Agora aims to share knowledge with stakeholders in the worlds of politics, business and academia while enabling a productive exchange of ideas. As a non-profit foundation primarily financed through philanthropic donations, Agora is not beholden to narrow corporate or political interests, but rather to its commitment to confronting climate change.



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