



Save the Children

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**GENDER SENSITIVE
LABOUR MARKET ASSESSMENT
ISTANBUL, TURKEY**

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ABBREVIATIONS

DISK – Confederation of Progressive Trade Unions of Turkey

ERG – Educational Reform Initiative

FGD – Focus Group Discussion

GDP – Food Retailing Association

IDI – In-Depth Interview

IPA – Labour Market Assessment Study by ISKUR

ISO – Istanbul Chamber of Industry

ISTESOB – Istanbul Construction Chamber of Tradesman and Craftsman

ISKUR – Turkish Employment Agency

ITO – Istanbul Chamber of Commerce

KEDV – Foundation for the Support of Women’s Work

KII – Key Informant Interview

KMD – Chain Store Association

KOSGEB – Small and Medium Enterprises Development Organization of Turkey

LMA – Labour Market Assessment

MoFLSS – Ministry of Family, Labour and Social Services

NGO – Non-Government Organization

SEDEFED – Federation of Sectoral Associations

SGK – Social Security Institution

TASD – Footwear Industrialists Association of Turkey

TGDF – Federation of Food and Drink Industry Associations of Turkey

TUBIDER – Information and Communication Technologies Association of Turkey

TUCED / TUCEF – Translators Association of Turkey

TURKSTAT – Turkish Statistical Institute

TURSAB – Association of Turkey Travel Agencies

UNHCR – United Nations High Commissioner for Refugees

GLOSSARY

Action Sectors: Sectors whose favourable expected job growth, competitive pay, skill requirements, etc., make them attractive targets for vocational training programs.

Association: Organized body of people who have an interest, activity, or purpose in common.

‘Decent’ Work: International Labour Organization (ILO) defines “decent work” as secure work that respects core labour standards, guarantees adequate income and social security and respects the freedom to enter into social dialogue as well as the freedom of association.

Employability: Having the capacity to be employed.

Gender: Gender refers to the socially constructed roles, behaviours, activities, and attributes that a given society considers appropriate for girls, boys, women, and men¹.

Gender Analysis: A process of collecting and analysing sex-disaggregated data in order to understand gender differences. Understanding these differences aids in influencing policy, programmes, and projects to best meet the needs of men, women, boys, and girls².

Gender Capacities: Elements that a particular gender group can contribute to society through innate or developed strengths or positive coping mechanisms³.

Gender Identity: The sense of oneself as female, male a blend of both or neither. There are different terms, descriptions and labels for different types of gender identities.

Gender Intersectionality: Talking about gender does not imply that all women or men are alike, but categories such as race, ethnic minority status, age, marital and/or socio-economic status are also intervening factors. Gender affects, and in fact often reinforces, vulnerabilities and differences with relation

¹ Save the Children Gender Equality Program Guidance and Toolkit, p.178

https://resourcecentre.savethechildren.net/node/8503/pdf/gender_equality_program_toolkit_2014.pdf

² Gender Impact Assessment, Wong, Commonwealth of Learning,

http://oasis.col.org/bitstream/handle/11599/1745/2015_Wong_Gender-Impact-Assessment.pptx?sequence=1&isAllowed=y

³ Rapid Gender Assessment, Fry, Save the Children, p.4

https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/gender_analysis_report_sci_29_oct_2017.pdf

to other structural differences, such as race/ethnicity, class and age. Hence, to be truly sensitive, gender sensitive policies should also reflect these inter-connections.⁴

Gender Mainstreaming: The process of assessing the implications for girls, boys, women, and men of any planned action in all areas and at all levels. It's a strategy for making girls', boys', women's and men's concerns and experiences an integral dimension of the design, implementation, monitoring, and evaluation of policies and programs. It's also a means to ensure that gender inequality is not perpetuated and that girls, boys, women and men all benefit equitably from our interventions⁵.

Gender Needs: Needs that arise out of the relative positioning of women and men. They may be practical (e.g. food and shelter) or strategic (e.g. legal rights, skill development, or leadership training)⁶.

Gender Roles: Distinct duties and responsibilities for men and women that have been determined by society. These roles vary across cultures, context, and time⁷.

Gender Sensitive: describes an approach or intervention in which the different needs, abilities, and opportunities of girls, boys, women, and men are identified, considered, and accounted for⁸.

Gender Vulnerabilities: Distinct risks that men, women, boys, and girls face due to their power or social standing in society⁹.

Gini coefficient by the household disposable income per equivalent household member: It measures the extent to which the distribution of equalised disposable income after social transfers deviates from a perfectly equal distribution. Its value ranges from 0 (complete equality) to 100 (complete inequality).

Household disposable income per equivalent household member: Total income of a household, after tax and other deductions, that is available for spending or saving, divided by the number of household members converted into equalised adults; household members are equalised or made equivalent by weighting each according to their age.

Immigrant: Someone who makes a conscious decision to leave his or her home and move to a foreign country with the intention of settling there.

Index (pl. Indices): A statistical measure of change given a period of time.

⁴ Guide on Gender-Sensitive Labour Migration Policies, Organization for Security and Co-operation in Europe, <https://www.osce.org/secretariat/37228?download=true> (15.10.2019).

⁵ Save the Children Gender Equality Program Guidance and Toolkit, p.178
https://resourcecentre.savethechildren.net/node/8503/pdf/gender_equality_program_toolkit_2014.pdf (15.10.2019)

⁶ Rapid Gender Assessment, Fry, Save the Children, p.4
https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/gender_analysis_report_sci_29_oct_2017.pdf (12.10.2019).

⁷ Ibid.

⁸ Save the Children Gender Equality Program Guidance and Toolkit, p.179
https://resourcecentre.savethechildren.net/node/8503/pdf/gender_equality_program_toolkit_2014.pdf (12.10.2019)

⁹ Rapid Gender Assessment, Fry, Save the Children, p.4
https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/gender_analysis_report_sci_29_oct_2017.pdf (11.10.2019).

Labour Market Assessment: Assessment conducted to understand the opportunities and demands of the local labour market especially in the industries which are flourishing and may provide vaster opportunities.

Migrant: Someone who is moving from place to place within his or her country or across borders, usually for economic reasons. Similar to immigrants, they are not forced to leave their native countries because of persecution or violence, but rather are seeking better opportunities.

NACE Rev.2: NACE is the “statistical classification of economic activities in the European Community” which imposes the use of the classification uniformly within all the Member States. The present NACE Rev. 2, which is the new revised version of the NACE Rev. 1 and of its minor update NACE Rev. 1.1, is the outcome of a major revision work of the international integrated system of economic classifications which took place between 2000 and 2007. NACE Rev. 2 reflects the technological developments and structural changes of the economy, enabling the modernisation of the Community statistics and contributing, through more comparable and relevant data, to better economic governance at both Community and national level.

Refugee: Someone who is unable or unwilling to return to their country of origin owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group, or political opinion.¹⁰

Sector: A portion of an economy characterized by interlinked or similar businesses engaging in activities tied to an overarching theme such as a particular type of commodity. Examples may include services, specific type of agriculture, or the garment industry.

Turnover: The amount received in sales for a stated period.

Unpaid Work: Unpaid work refers to efforts that produce goods or services for household or external consumption, but that cannot be sold in the market.

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¹⁰ UNHCR “What is a Refugee?”; from 1951 Convention and Protocol relating to the Status of Refugees, <https://www.unhcr.org/what-is-a-refugee.html> (15.10.2019).

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Executive Summary

This Gender Sensitive Labour Market Analysis (LMA) for Istanbul, prepared by INGEV in cooperation with Save the Children, has been designed in such way to provide insight to stakeholders for two main objectives;

- to empower economically vulnerable young females and males from refugee and host communities through decent work opportunities in order to realize their untapped potential, reduce inequality in their standards of living and contribute to economic development of whole society,
- to improve the economic conditions of displaced people in a gender-sensitive manner (i.e. gender equality in education, increasing women's participation in the work force, closing the pay gap between women and men, etc.) and look for opportunities to provide decent work both to women and men for more dignified, sustainable and satisfying labour conditions from a gender sensitive perspective.

To help Syrian youth prepare for a better future, Save the Children and INGEV conducted a labour market assessment for Istanbul market in 2017 and delivered a contextualized Employability Skills Training. Save the Children now prepares to expand its livelihoods programming with a new project focusing on equipping Syrian and vulnerable host community adolescents and youth with skills that enable them to move forward to a brighter future by choosing between an Employability or an Entrepreneurial Pathway. Findings from this updated gender-sensitive LMA are to be used to shape this program expansion.

By adopting a gender mainstreaming approach, the question of whether these job or business opportunities serve gender equality or propagate traditional gender norms for women and men has been kept in focus throughout all stages of the study, from design and data collection to report-writing. Each sector and occupational group in focus was reviewed separately for perceptions toward women and men in order to pinpoint any sources of gender stereotypes that could lead to unfair treatment of one sex compared to the other or propagate traditional gender norms in the society.

The report findings indicate that most promising business sectors for the employment pathway are Food Production; Healthcare Services; Hospitality (incl. accommodation, food servicing, travel operations); information and communication technology; Textiles/Apparel/Shoes; Wholesale and Retail Trade. Favourable occupational groups in these sectors are; marketing and sales positions; production and assembly line jobs; repairs and technical support; product development and design roles; logistics and supply chain operations.

Entrepreneurship pathway findings indicate that most promising sectors are Textiles and Clothing; Realty; Hospitality (travel, health tourism, beauty care, food services); Information and Communication Technology. Potential business ideas associated with these sectors are all small-scaled or home-based apparel export agency or store; travel agency; restaurant; beauty care shop; web or graphic designer; software developer; technical support or hardware repair store; online marketing services.

Main barriers against higher employment and entrepreneurship among the Syrian community in Turkey are found to be bureaucratic difficulties (such as employment quotas, work permit procedures, lack of sufficient knowledge on the tax system and legal requirements of running a business); employer attitudes; and lack of awareness with respect to how to search for jobs or access vocational training programs. Gender norms also impacts the situation, e.g. by determining what jobs are "acceptable" or by increasing the risk for gender-based violence in certain sectors/type of job.

1. INTRODUCTION

The Sustainable Development Goals adopted by all United Nations Member States in 2015 address the main 17 global challenges the world faces today. Ensuring gender equality is at the forefront for the creation of a better and more sustainable future for all. Therefore, any development programme that aims to strengthen economic structure of any country should give priority on the needs of women, men, boys and girls through gender mainstreaming lens to understand their vulnerabilities, available opportunities and existing roles in society.

Gender includes all individuals and prevailing gender norms may create differences of experience within and across the cultures. In a country like Turkey, which has ranked 130th among 149 countries in the 2018 Global Gender Gap Index¹¹, gender norms and roles influence and shape the daily lives of every person from many aspects ranging from household roles to unequal wage in workplace or representation in political life. Gender norms also oppress boys and men into behaving in predefined masculine roles, which may trigger gender-based violence and inequal conditions for all in society as a result.

Turkey has been dealing with multiple issues caused by having to meet the socio-economic needs of more than 3,600,000 Syrian refugees residing in the country. The Syrian Civil War, which has been ongoing since March 2011, has caused a refugee influx of unprecedented size in Turkey's history. According to figures of the United Nations High Commissioner for Refugees, out of 5,600,000 registered Syrian refugees fleeing the war in their country, more than 3,600,000 people live within the borders of the Republic of Turkey¹². According to the recent data in Istanbul, the number of registered Syrians is estimated to be over 539,000¹³, however this figure represents only a proportion of the total refugee population in Istanbul. According to estimates, the total number of Syrian and non-Syrian refugees in Istanbul is around 1,000,000¹⁴.

Host community youth in Turkey suffers from unemployment in the current deepening economic crisis environment. The inclusion of Syrian refugees into labour market increases social tensions and discontent between the local population and refugees. According to the International Crisis Group report on intercommunal violence between host communities and Syrian refugees, the anti-refugee violence increased threefold in the second half of 2017 compared to the same period in 2016.¹⁵ It is highest in the metropolitan areas of Istanbul, Ankara and Izmir where host communities see Syrians as culturally different and resent their competition for low-wage jobs or customers, especially within the informal economy. An estimated 750,000-950,000 Syrians currently work in the informal sector; only 15,000 have obtained the permits needed for formal employment. The status of temporary protection is given in connection to the city where

¹¹ World Economic Forum, The Global Gender Gap Report 2018, http://www3.weforum.org/docs/WEF_GGGR_2018.pdf (12.10.2019).

¹² UNCHR (2018), Statistics on Registered Refugees.

¹³ Erdoğan, M. (2017). Kopuştan Uyuma Kent Mültecileri. Marmara Belediyeler Birliği Kültür Yayınları / Urban Refugees from Detachment to Harmonization. Marmara Municipalities Union Cultural Publications.

¹⁴ *ibid*, p.36.

¹⁵ <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/turkey/248-turkeys-syrian-refugees-defusing-metropolitan-tensions> (12.10.2019).

the holder has the permit to reside and work, and any temporary protection holder cannot gain registered employment in Istanbul if their temporary protection status is associated with another city. The informal sector also employs one-third of the Turkish labour force.

Some of the frequently met challenges reported by Syrian refugee young females and males are: inability to speak Turkish, low levels of education, differences in culture, few occupational skills, increase in negative perceptions and stories about Syrians¹⁶. Intersection of marginalized ethnicities, gender, sexual orientation and class shape a powerful social stratification, which constrain marginalized people from fully participate the life. Therefore, particularly unqualified females and males in need of work find themselves more inclined to informal, irregular, unpreferable and low-quality jobs.

The implications of influx are different for men and women. Gender based discrimination in host countries' labour markets particularly affects marginalized groups of migrant society in various forms. Thus, all the interactions and power relations associated with gender affect the migration process significantly. Female migrant workers often experience different disadvantages in comparison to men, due to their status, to the nature of the employment sector and type of educational requirements as well as stereotyped roles of men and women. Traditional understanding of feminized roles such as caregiving and household labour prevent women from actively participating in earning-based sectors in the labour market and pursuing professional careers through decent work. At the same time, it is worth noting that migration processes can also result in changed gender dynamics by increasing women's entry into the labour market. This in turn creates an interplay of various different factors including issues with work environments, occupational demands by employees which are shaped by gender norms and women's adaptation to establishing work-life balance.

There are also stark differences between women's work trends before and after Syria's conflict. In pre-2011 Syria most women, even those with college degrees, did not work outside the home; just 22% of women participated in the workforce. On average, women's wages were 20% of men's, according to the World Economic Forum¹⁷. Many Syrian women now have to support their families by working in paid formal and informal employment. With men struggling to find work or absent, more women are taking up jobs or even setting up small businesses. The traditional role of women has changed from being a homemaker to someone who generates income. Yet, whilst for some women this has created an increased sense of empowerment, some women view the changes negatively, with many of them feeling more vulnerable to violence, abuse and harassment¹⁸. Thus, while migration provides new opportunities for women, it also often gives rise to threats specifically against their security and human rights.

Save the Children believes that support to young females and males to strategically develop expertise and networks within relevant sectors will help to promote long-term and sustainable solutions for these individuals – as well as for their own children later on in the future. To help Syrian young females and males prepare for a better future, Save the Children conducted an LMA for Istanbul market in 2017 and delivered a contextualized Employability Skills Training, which focuses on life skills and job-search skills in collaboration with its local partner, and soon will start linking graduates with paid internship opportunities. Save the Children is now expanding its livelihoods programming with a new project focusing on equipping

¹⁶ Ibid.

¹⁷ <https://www.pri.org/stories/2018-08-30/syrian-revolution-changed-how-women-are-viewed-workplace> (08.10.2019).

¹⁸ <https://theintercept.com/2019/02/03/syrian-women-turkey-empowerment/> (08.10.2019).

Syrian and vulnerable host community adolescents and youth with skills that enable them to move forward to a brighter future by choosing between an Employability or an Entrepreneurial Pathway.

Save the Children also believes that gender equality is inextricably linked to child rights, and around the world gender discrimination results in critical child rights violations. It is therefore essential to identify and address the specific needs of girls, boys, women, and men across all programs if the vision of a world where every girl and every boy attains their equal right to survival, protection, development, and participation is to be fulfilled. This process of gender equality integration, often called gender mainstreaming, drives positive, transformative results, and is key to effective and sustainable development. The inclusion of gender equality both for refugees and local youth into nationwide development plans and achieving a gender sensitive approach in the labour markets require a broad normative framework and instruments. Besides stimulating gender sensitive programming, it is therefore vital for this LMA to shed light on the labour market from a gender perspective to create a base for further communication with key stakeholders (i.e; government bodies, business associations, trade groups, major employers in the private sector, employment agencies, training schools etc.) for such frameworks and instruments.

1.1. AIM OF THE ASSESSMENT

INGEV, in cooperation with Save the Children, conducted a detailed analysis of Istanbul labour market from a gender sensitive perspective in order to;

1. better understand the job opportunities, employer requirements and specific employment partnerships within a value chain approach that would be most relevant for male and female target groups within these action sectors;
2. identify gaps for Syrian youth and other vulnerable groups in accessing employment;
3. identify potential partners for implementation and placement; markets with a potential entrepreneurial growth that would be available for the target young females and males with regards to small and / or home-based businesses, market feasibility and trends, available governmental and private business grants and marketing strategies;
4. identify the employability and entrepreneurial opportunities of vulnerable young females and males in the determined action sectors through questioning whether or not these sectors allow gender equality rather than reproduction of gender norms in society.

1.1.1. Note on Gender Sensitivity

For the purpose of this LMA, gender sensitivity describes an approach or intervention in which the different needs, abilities, and opportunities of girls, boys, women, and men are identified, considered, and accounted for. Gender, a term distinguished and separate from biological sex, consists of socially learned roles such as “masculine” and “feminine”. Gender sensitivity ensures that, when devising policies or programs, we do not consciously or subconsciously rely on the assumptions about the traditional roles of men and women. Any policy or program that ends up giving unfavourable treatment based on sex could result in proliferation and reproduction of gender-based norms in society regardless of whether this happens intentionally. Two important risks to watch out for while designing programs are gender unawareness and gender exploitation.

Gender exploitative approaches and interventions take advantage of rigid gender norms and existing imbalances in power to further exploit girls and women to achieve the program objectives¹⁹. Gender unawareness on the other hand indicate lack of consideration of gender at all – they may inadvertently reinforce gender inequalities and miss opportunities in program design, implementation, and evaluation to enhance gender equality and achieve more sustainable project outcomes²⁰.

This gender-sensitive LMA study aimed to pinpoint the sectors and occupations conducive to the successful employment of the Syrian young / adolescent females and males in Turkey and explore promising pathways for entrepreneurship by young Syrians in Turkey. The study comprised in-depth/key informant interviews with key stakeholders from business associations, private sector firms and civil society organizations as well as focus group discussions with adolescent/young Syrian people and entrepreneurs living in Turkey.

Experienced stakeholders and professionals from different business sectors offered their opinions and observations regarding the occupations that are more promising. While in some cases their recommendations did not vary for women and men, in others their suggestions did discern between the two sexes.

Throughout the writing of this report, arguments deriving from KIIs and FGDs were carefully studied on a case by case basis to check whether any differentiation based on sex could stem from the traditional roles associated with women and men. Wherever this was thought to be the case, occupational recommendations based on such arguments were excluded from the concluding recommendations of the report to the extent possible. Such arguments were still included as quotations or citations in the discussion and main body of the report in order to offer a realistic picture of the perceptions prevailing in the market.

Applying a gender-sensitive approach when assessing statements from key informant labour market experts involved reflection on whether an advice emerges from functional reasons that have validity in the business sector in focus. Occupations that are recommended based on generalizations about qualities traditionally associated with being masculine or feminine were discarded in the final analysis. For instance, a recommendation that women in tourism could look for jobs such as cleaning or housekeeping because cleaning is generally a woman's task in Syrian households would be discarded.

Another means of assessment was to check the key informant recommendations against the findings from focus group discussions with Syrian males and females. If any occupation recommended by a key informant was shown to be viewed negatively by Syrian women or men regarding their aspirations for themselves, then it was generally excluded from report's final recommendations. This introduced a point of differentiation between women and men, and other intersectional factors to the extent that their occupational aspirations differed from each other and members of the host community.

Various studies over the years have identified unconscious gender biases prevalent in the society²¹. There is some evidence that such unconscious biases affect even

¹⁹ Save the Children Gender Equality Program Guidance and Toolkit, p.178

https://resourcecentre.savethechildren.net/node/8503/pdf/gender_equality_program_toolkit_2014.pdf (15.10.2019)

²⁰ Ibid.

²¹ For example;

“Science faculty's subtle gender biases favour male students”, *Moss-Racusin et al*,

<https://www.pnas.org/content/pnas/early/2012/09/14/1211286109.full.pdf> (12.10.2019)

children²². The fact that these prejudices are unconscious indicates the possibility that we may not be aware of our own biases or how they affect our preferences and decisions. This also applies to those designing social programs as well as the research team in charge of this report. The crucial step in prevention of such biases is to become aware of our own limitations and rely on a process of checks and error-finding conducted by objective controllers.

It should also be noted that this gender-sensitive LMA does not focus on the experience of different gender identities in the labour market. A more comprehensive gender (identity) analysis would be advised for such purpose.

1.2. METHODOLOGY

This study was over the period June-September 2019 and conducted in two phases, informed by the results of an initial desk research. Qualitative methodologies were used to complement already existing quantitative data, as illustrated in the table below.

Table 1. Summary List of Methodology

Phase 1	
Desk Research	Preliminary understanding of the sectors and who to interview
5 Focus Group Discussions	<ul style="list-style-type: none"> • Syrian female entrepreneurs (36-47 years old) • Syrian male adolescents (15-17 years old) • Syrian female adolescents (15-17 years old) • Syrian male youth (18-24 years old) • Syrian female youth (18-24 years old)
8 Key Informant Interviews	United Work, Habitat, Ismek, ITO, ISO, ISTESOB, KEDV
Workshop with key stakeholders	Save the Children and INGEV organized a workshop with stakeholders to present, review and add to the findings of Phase 1
Phase 2	
27 In-Depth Interviews	Tarbush Syrian Restaurant Chain, Medical Park Hospital Florya Branch, Unitek, De Facto, Hurabee Entrepreneurial Consultancy and Trainings, Gezer, Akademi Istanbul Language Center, Sümer Seyahat A.Ş., Emir Turizm, Muhtar Sweets, Gurbetna, Syrian Real Estate Company, TURSAB, GDP, KMD, TASD, TGDF, Textile Workers Union, ERG, TUBIDER, TUCED and TUCEF, SEDEFED, ICT Expert in Sultanbeyli Refugee Association, Freelance ICT Expert, Robotel, Association of Turkish Furniture Manufacturers (MOSDER), Union of Public Woodwork.

²¹ "Investors prefer entrepreneurial ventures pitched by attractive men", *Brooks et al*, <https://www.pnas.org/content/pnas/111/12/4427.full.pdf> (05.10.2019)

²² "Gender stereotypes about intellectual ability emerge early and influence children's interests", *Bian et al*, <https://science.sciencemag.org/content/355/6323/389> (behind paywall) (01.10.2019)

Phase 1:

As illustrated in the table above, three different methods were used during the Phase 1 of the gender sensitive LMA.

1. A desk research was conducted to identify the growing sectors suitable for decent work opportunities and key organizations/individuals to interview during KIIs and FGDs. Government statistics by TURKSTAT (Turkish Statistical Institute) and SGK, statistics from ISKUR Istanbul Labour Market Assessment Report (IPA) of 2018 and other related research reports by INGEV on Syrians in Istanbul and Syrian youth were covered as part of this research. It's important to note that TURKSTAT is the only official provider of labour statistics in Turkey and all the other local or international agencies use TURKSTAT as a source of information with regards to labour statistics.
2. A focus group discussion (FGD) with Syrian female entrepreneurs was conducted to learn about their entrepreneurial journey, barriers and solutions they have faced, key success factors, skills needed and impact on their family life. FGDs with Syrian male and female adolescents and youth were also conducted to capture the target population's perspective on the opportunities and constraints they face in accessing satisfactory employment and business opportunities, along with their work-related interests and the support they would need in terms of resources and skills to explore better job and entrepreneurship alternatives. The list of FGD participants is in **Annex 1 – FGD Participants**.
3. Key informants from recruitment agencies, training institutions, government agencies and NGOs were interviewed in order to obtain information about growing sectors and sectors with available decent work opportunities for young Syrian females and males. Sampling was done by listing all the relevant actors checked through desk research, and interviews were conducted with the participants from this eligible list of leaders who accepted to take part in the gender sensitive LMA. Interviews with NGOs were mainly conducted with the aim of discovering sectors which are already penetrated and jobs performed by Syrians in Istanbul, as well as the other job opportunities which can be suitable for young Syrian women and men. Interviews also included a part on entrepreneurial path that would be available for the targeted group with regards to small and / or home-based businesses, market feasibility and trends, available governmental and private business grants and marketing strategies. The list of respondents interviewed is in **Annex 2 –KII and IDI Participants**.
4. Save the Children and INGEV organized a workshop in Istanbul on July 24th, 2019 with the participation of various stakeholders, including experts on livelihoods and a Gender Equality Specialist from Save the Children. This constituted the last step of the 1st phase of the assessment. The workshop involved a presentation of the findings from the literature review as well as from the phase-1 FGDs and KIIs to stakeholders who are experienced on the issue of refugees in Turkey. After presentation of findings, the participants held roundtable discussions about the results and action plans. The outcome of the roundtable study is outlined below under four headings; opportunities, challenges, durable solutions and gender. Main findings of each of these roundtable discussions will be presented in Section 2.5 of this report.

By integrating the information collected through three complementary methodologies, so-called “action sectors” and related occupations/positions were identified following certain pre-defined criteria.

Criteria for selection of action sectors in the literature review phase are below;

1. Current number of employees
2. Expected increase in number of employees
3. Number of open positions
4. Number of difficult to fill positions
5. Share and occupational skills of female-male employees

Criteria used for selection of action sectors in FGDs;

1. Personal aspirations for the sector
2. Reputability of the sector for the individual

Criteria used for selection of action sectors in KIIs;

1. Most frequently mentioned sectors by key informants
2. Potential of the sector in managing gender equality

Phase 2:

For Phase 2, IDIs, KIIs and further desk research studies were conducted. IDIs and KIIs were conducted with vocational associations, private firms and entrepreneurial consultants representing their sectors to understand and gather information related to the status of action sectors, potential challenges and opportunities, jobs available for refugees, components of the decent sectoral jobs for both young females and males, technical, soft and language related skills required for these jobs, vocational training opportunities, already penetrated or potential jobs performed by Syrians in Istanbul, and existing situation of females and males in the sector. Additionally, entrepreneurial capacities if any were asked to enrich the research for the future plans of Save the Children. Interviewee sampling was done by listing all the relevant and leading actors through desk research and contacting them to check their willingness to participate in the study. Ones which accepted to participate in the assessment were interviewed.

During desk research, additional information about the identified action sectors and job opportunities were gathered to give a deeper understanding and support the findings of IDIs and KIIs.

Sequential value chain phases for each sector chosen in phase 1 were also explored through the IDIs and KIIs of Phase 2. Various roles presenting employment or entrepreneurship opportunities were uncovered for each phase in the advancement of these sectoral value chains.

The list of respondents interviewed is in ***Annex 2 –KII and IDI Participants***.

Limits to the Assessment

Concentration on a single issue: Given that this assessment has been conducted to discover employment opportunities for Syrian adolescents and young women and men through a labour market analysis perspective, most of the discussion revolves around sectoral performances and other topics related to that. The assessment has touched upon other vulnerabilities of Syrians very briefly.

Many employers refused to participate: Due to the scope of the assessment, only limited number of employers could be included in the assessment and sectoral information was mainly provided by business associations and trade groups.

Additional Quantitative Data: There can be methodological additions to the gender sensitive LMA as well. Any additional research that would be focused on the current status and the future expectations of the Syrian youth (or any other age group for that matter) should also include a quantitative survey, besides a qualitative one. Evidence from larger population of the target beneficiaries will strengthen the findings and recommendations of the assessment.

Geographical Coverage: One last limitation and therefore opportunity for the future would be the geographical coverage of the assessment. Although Istanbul has the largest Syrian population so far, other highly populated provinces such as Hatay, Gaziantep and Sanliurfa should be included in the further LMA studies. Focus group discussions always involve the risk for participant members' pressure on each other. During our discussions, cross check questions were used to mitigate that risk, and rather than a random turn-taking a deliberate and fair turn-taking method was carried out.

Unconscious gender bias: As earlier mentioned, unconscious gender bias applies to everybody in a society, also to the research team of this study. To mitigate this limitation, constant self-reflection as well as relying on a process of checks and error-finding conducted by objective controllers has been key.

Lack of public data: In order to make a detailed analysis, demographical and gender disaggregated data for some important indicators, such as number of issued work permits per gender and work permit exemption, or district based demographics are crucial. Thus, due to unavailability of such data, the study could not provide an analysis of that level and make inferences which are important for a gender sensitive study.

1.3. BACKGROUND ON EMPLOYMENT AND LABOUR MARKET

Before moving into discussion on sectors and occupations which will help us to analyse the employment opportunities and labour dynamics for Syrian and economically vulnerable Turkish young women and men, overall indicators of Istanbul's labour market and its placement in Turkey's labour market on the targeted groups will be laid out in this section.

a. Population and Employment Status in Istanbul for Local Population

Istanbul plays a primary role in the economy of Turkey. Although Istanbul hosts only 18.4% of Turkey's population, the fact that it has a share of 31.2% in Gross Domestic Product is one of the most significant indicators in this respect. While the average annual household disposable income per equivalent household member in Turkey is TRY 21,576 in 2017, this figure is TRY 30,895 in Istanbul (TR 10) region. According to data of TURKSTAT, it is seen that the city with the highest income inequality in Turkey is Istanbul. When a measure of income inequality, *Gini coefficient by the household disposable income per equivalent household*

member, is considered, it was measured to be 0.443 in Istanbul region while it was 0.405 in Turkey as of 2017. These figures indicate that income distribution in Istanbul is more uneven than Turkey in general.²³

The economic growth figures of Istanbul show that the city has entered a rapid growth process in the last 10 years, leaving behind the effects of the Global Economic Crisis in 2008 and the European Debt Crisis in 2010. According to Euromonitor's data for the years 2012 to 2017, while the Gross Growth Rate of the city was 6.6%, the growth rate of Turkey was 3.6% in the same period.²⁴ When export figures are considered, Istanbul's importance to Turkey is even better understood. While 46% of total national exports was generated by Istanbul alone in 2011, this rate has reached 52% in 2014 and remained around that level in the following years.²⁵

Although it is placed on a total area of less than 1% of Turkey, one out of every 5 people living in Turkey resides in Istanbul. According to "Address Based Population Registration System" data, it is seen that the ratio of people living in Istanbul to the total population of Republic of Turkey, which was nearly 82,000,000 in 2018, is 18.4%. In the recent 18 years as from the 2000s, total population of the city reached up to 15,000,000 in 2018 increasing by 36%.

Table 2. Population in Istanbul and Turkey

	2000	2007	2018
Turkey	64,729,501	70,586,256	82,003,882
Istanbul	11,076,840	12,573,836	15,067,724
%	17%	18%	18.4%

Source: TURKSTAT, 2000-2018

The most important reason for such a major demographic change in a relatively short period of time is the positive net internal migration from the rest of the country to Istanbul. According to data set, it appears that Istanbul has shown a population increase faster than the population increase of Turkey in general. Istanbul's share in the total population has increased from 17% to 18.4% within this period.

It is seen that this trend has been reversed in recent years. While 385,482 people migrated to Istanbul in 2017-2018, the number of people who migrated from the city was 595,803. Accordingly, 210,321 people has chosen to leave Istanbul and live in other cities. Nevertheless, according to data for the years 2017-2018, Istanbul still maintains to be an immigrating city.²⁶

When the population structure of the city is considered, it shows parallels with overall population in Turkey. The population proportion in 0 to 14 years of age group, which is defined as "children" age group in official statistics, is 23.6% in Turkey overall whereas this proportion in the same age group is 22.1% in Istanbul.

²³ TURKSTAT (2017). Regional Results of the Income and Living Conditions Research.

²⁴ Istanbul Development Agency (2014). Istanbul Regional Plan 2014-2023.

²⁵ TURKSTAT (2017). Foreign Trade Statistics by Provinces

²⁶ TURKSTAT (2018). Address Based Population Registration System, Emigration received/sent by provinces, net migration and net migration rate, 2008-2018

Table 3. Population Structure by Age and Gender Groups in Istanbul

	14 or less	15-19 years of age	20-24 years of age	25-34 years of age	35-54 years of age	55+ years of age	Total
Female	1,619,456	524,788	589,280	1,310,532	2,272,883	1,208,554	7,525,493
Male	1,712,504	560,454	585,938	1,315,558	2,322,618	1,045,159	7,542,231
Total	3,331,960	1,085,242	1,175,218	2,626,090	4,595,501	2,253,713	15,067,724

Source: TURKSTAT, Population by province, age group and gender, 2018

When the population structure of the city is considered by its districts, Esenyurt, Küçükçekmece, Bağcılar, Pendik and Umraniye make up one fourth of the population. They are the five most populated districts in Istanbul (out of 39 districts in total)²⁷. Esenyurt, Kucukcekmece and Bagcilar are also among the top 5 districts with highest Syrian population.

Table 4. Top Five Most Populated Districts in Istanbul (Full list is in Annex 4)

Istanbul Districts	Male	Female	Total	% in total
Esenyurt	456,552	434,568	891,120	5.9
Kuçükçekmece	385,154	385,163	770,317	5.1
Bagcilar	372,311	362,058	734,369	4.9
Pendik	350,302	343,297	693,599	4.6
Umraniye	345,478	344,715	690,193	4.6

Source: TURKSTAT, December 2018, <https://www.nufusu.com/il/istanbul-nufusu>

Istanbul hosts 19.4% of the 15+ population and 20.9% of the labour force (i.e. the number of people who are employed plus the unemployed who are looking for work) in Turkey²⁸. Tables 5 and 6 display labour market indicators for Turkey and Istanbul respectively. In comparison with Turkey as a whole, labour force participation, unemployment and employment rates are higher in Istanbul. Labour force participation rate in Istanbul is 4.3 points higher than in Turkey (57.5% vs 53.2%), including both female and male labour. Overall unemployment rate is 12.5% for Istanbul vs. 11% for overall Turkey (F: 13.9%, M: 9.5%); whereas youth unemployment rate averages significantly high at 20% for both, and higher for young women than men (F: 25.9%, M: 17.6%)²⁹.

²⁷ TURKSTAT, December 2018, <https://www.nufusu.com/il/istanbul-nufusu> (15.10.2019).

²⁸ TURKSTAT (2018).

²⁹ Ibid

Table 5. Labour Market Indicators of Turkey (table should be read horizontally)

Thousand people	Female (%)	Male (%)	Turkey Overall
15+ population	50.5	49.5	60,654
Labour Force	32.5	67.5	32,274
Employed	31.4	68.6	28,738
Unemployed	41.1	58.9	3,534
Not in Labour force	71.1	28.9	28,380
Labour Force participation rate (%)	34.2	72.7	53.2 %
Unemployment rate (%)	13.9	9.5	11.0 %
Youth Unemployment rate (%)	25.9	17.6	20.3 %
Employment rate (%)	29.4	65.7	89.0 %

Source: TURKSTAT, 2018

Looking at the labour statistics in Istanbul, 50.2 % (5,894,000) of Istanbul population consists of females over 15 years old. Of these, as illustrated in the table below, it should be noted that:

- 57.4% of the population over 15 years old (6,738,000) are in the labour force (F: 33.1%, M: 66.9%).
- 87.5% of the regarded population (5,899,000) in the labour force are employed (31.9% female, 68.1% male).
- 12.5% of the regarded population (839,000) in the labour force are unemployed (41.2% female, 58.8% male).

Table 6. Labour Market Indicators of Istanbul (table should be read horizontally)

Thousand persons	Female (%)	Male (%)	Istanbul
15+ population	50.2	49.8	11,740
Labour Force	33.1	66.9	6,738
Employed	31.9	68.1	5,899
Unemployed	41.2	58.8	839
Not in Labour force	73.2	26.8	5,002
Labour Force participation rate (%)	37.9	77.1	57.4 %
Unemployment rate (%)	15.5	10.9	12.5 %
Youth Unemployment rate (%)	25.4	17.5	20.0 %
Employment rate (%)	32.0	68.6	87.5 %

Source: TURKSTAT, 2018

Gender reflection of the high youth unemployment rate is dispersed very similar again for Istanbul and overall Turkey. About one fourth of female youth and nearly one fifth of male youth are unemployed in Istanbul and Turkey.

According to an analysis made by the Research Institute of the Confederation of Progressive Trade Unions of Turkey (DISK) ³⁰ using Household Workforce Survey by TURKSTAT, employment data by ISKUR, insurant statistics by Social Security Institution (SGK), and data by the Ministry of Family, Labour and Social Services (MoFLSS), it is observed that the number of unemployed people registered at ISKUR has been rapidly rising in the last years. While there were 2,100,000 registered unemployed individuals in 2015, this number later increased to 2,600,000 in 2017, to 3,500,000 in 2018 and finally to 3,800,000 in January 2019. Significant gender differences are observed in the number of registered unemployment. Women gradually opt for applying to ISKUR more frequently. The gap in unemployment registration between women and men has, however, gradually closed. In 2018, the number of registered unemployed women exceeded men: 1,805,000 women versus 1,704,000 men (difference of 5.9%). As of January 2019, there were 1,932,000 registered unemployed women, while the number of registered unemployed men stands at 1,843,000 (difference of 4.8%). It is important to note that besides host community, refugees with certificate of residence are included in labour force statistics by TURKSTAT and any individual with who applies to ISKUR is counted toward registered unemployment.

There may be several drivers of this increase in the registered unemployment figures of women: incentives granted for women’s employment in the last years (applying to both refugee and host community members), utilization of these incentives via ISKUR, and gradually higher preference for women in ISKUR’s active labour programs. It can also be concluded that the number of women on the labour market has increased due to the economic downturn in Turkey in recent years, and their tendency to search jobs via formal channels has become stronger.

It is also clear that the unemployment rates in all education groups in Istanbul is above the national average, and serious competition is in question for the positions in the employment market.

Table 7. Unemployment Rate under Education Groups by Years in Istanbul (%)

Years	2015 (%)	2016 (%)	2017 (%)	2018 (%)
15-64 years of age	12.9	13.5	13.9	12.5
Below High School Education	13.4	13.2	13.6	10.1
High School	13.3	14.6	14.6	13.1
Higher Education	11.6	13.5	14.1	12.4

Source: TURKSTAT, 2018

³⁰ “Work-force participation in Turkey: Unemployment increased by 700.000 while employment decreased by 1 million”. <https://dokuz8haber.net/english/work-force-participation-in-turkey-unemployment-increased-by-700-000-while-employment-decreased-by-1-million/> (10.10.2019).

When we consider the distribution of employment among major fields of activity (as listed in NACE Rev. 2³¹; Statistical classification of economic activities in the European Community), it is seen that unlike in Istanbul, agriculture and livestock industries have primary importance for the economic structure of Turkey. This is shown by considering the ratio of agriculture and livestock industries to the total employment as well as the size of total land used for agriculture and livestock. It is observed that 55% (15,800,000) of 28,700,000 employees works in the service sector, 27% (7,700,000) in the industry and 18% (5,300,000) in the agriculture sector. In Istanbul, on the other hand, 67% (3,900,000) of 5,900,000 employees work in the service sector, and the rest is employed in the industry. The employment size in agriculture is almost negligible (1%).

Table 8. Sectoral Distribution of Employment in Turkey and Istanbul

Sector	Agriculture (thousand person)	Industry (thousand person)	Service (thousand person)	Total (thousand person)
Istanbul (TR 10)	70	1,900	3,929	5,899
Turkey	5,297	7,667	15,774	28,738

Source: TURKSTAT 2018

b. Population and Employment Status in Istanbul for Syrians

When analyzing the labour market situation in Turkey, one need to consider the increasing population of Syrian refugees hosted by Istanbul. The Syrian Civil War, which has been going on since March 2011, has caused a refugee influx of unprecedented size in Turkey. According to August 2019 figures of the Directorate General of Migration Management 3,649,750 people live within the borders of the Republic of Turkey.³²

According to the same data, the number of registered Syrians in Istanbul is 548,134³³; however, this figure represents only a proportion of the total refugee population in Istanbul. According to estimates, the total number of Syrian and non-Syrian refugees in Istanbul is around 1,000,000.³⁴

Temporary protection status in Turkey requires its holders to stay in the province where they are officially registered. Many Syrians with this status have moved to Istanbul, where prospects of finding work are better. On July 12, 2019 the Istanbul governorship had issued a deadline for those without valid documents to relocate their registered city. According to this, those without registration documents in Istanbul have until October 30, 2019 to relocate. Primary school students and their families, orphans, employers and university students are exempt from the relocation program.³⁵

It is seen that Syrian refugees are concentrated especially in certain districts. Accordingly, Kuçukçekmece hosts the largest number of refugees, and when the ratio of number of Syrian refugees to total population

³¹ NACE Rev. 2 <https://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF> (10.10.2019).

³² Directorate General of Migration Management (August 15, 2019).

³³ Ibid

³⁴ Erdoğan, M. (2017). Kopuştan Uyuma Kent Mültecileri. Marmara Belediyeler Birliği Kültür Yayınları, p.36.

³⁵ <https://www.infomigrants.net/en/post/19136/more-than-20-000-migrants-and-syrian-refugees-expelled-from-istanbul> (10.10.2019).

of district is considered, Zeytinburnu hosts the highest ratio of Syrian refugees in comparison to district population.

Table 9. Districts of Istanbul Where Syrian Refugees under Temporary Protection Densely Reside

District	District Population	Number of Syrians under Temporary Protection	Ratio of Syrians under Temporary Protection to Total District Population (%)
Kucukcekmece	761,064	38,278	5
Bagcilar	757,162	37,643	5
Sultangazi	521,524	31,426	6
Fatih	419,345	30,747	7.3
Esenyurt	742,810	29,177	4
Basaksehir	353,311	26,424	7.5
Zeytinburnu	289,685	25,000	8.6
Esenler	459,983	22,678	5
Sultanbeyli	321,730	20,192	6.2
Avcilar	425,228	19,554	5
Arnavutkoy	236,222	17,838	7.5
Bahcelievler	602,040	17,710	3
Gaziosmanpasa	501,546	17,709	3.5
Sisli	274,017	15,269	5.6
Umraniye	688,347	14,858	2.2
Kagithane	437,942	14,216	3.2
Gungoren	302,066	12,727	4.2

In the table below, Istanbul districts with highest Syrian population are ranked with respect to the average monthly rent levels within the district. Rank of each district among all districts in Istanbul appear on the third column. This ranking indicates that majority of Syrians in Istanbul live in districts that are at the 50th percentile or below with respect to average rent (50th percentile corresponds to number 19 in the ranking or lower). Such lower rent levels might be one of the chief reasons attracting Syrians under Temporary Protection to these districts. Apart from rent levels, cultural similarities could also play a role in district selection. Majority of these districts where SuTPs are densely populated have a history of voting for conservative political

parties. To the extent that Syrian community in Istanbul prefers to adopt a religious or conservative lifestyle, they might be attracted to districts already significantly inhabited by populations with similar lifestyles³⁶.

Table 10. Rent Levels for Istanbul Districts

District	Number of Syrians under Temporary Protection	Rank of Average Monthly Rent among 37 districts* (Most expensive= 1st Rank)
Kucukcekmece	38,278	16
Bagcilar	37,643	24
Sultangazi	31,426	36
Fatih	30,747	8
Esenyurt	29,177	33
Basaksehir	26,424	22
Zeytinburnu	25,000	9
Esenler	22,678	26
Sultanbeyli	20,192	37
Avcilar	19,554	25
Arnavutkoy	17,838	N/A
Bahcelievler	17,710	17
Gaziosmanpasa	17,709	29
Sisli	15,269	7
Umraniye	14,858	21
Kagithane	14,216	13
Gungoren	12,727	18

Source: Endeksa (Two Istanbul districts—incl. Arnavutkoy—are not included in the index.)

A survey conducted in 2017 shows that Syrian refugees are actively engaged in the business and employment market in Istanbul. The main income source of 93% of the Syrian refugees in Istanbul is the wage earning obtained for the work.³⁷ Cash and non-cash benefits account for only 6% of the Syrian household income. On the other hand, according to the most recent figures of the Directorate General of Migration Management, an estimated one third of the registered Syrian refugees are between 10 and 24 years old.³⁸ According to the evaluations and estimates in another study by INGEV and also considering the estimated number between 450,000- 500,000 unregistered refugees in Istanbul, nearly half of the urban refugees are children and young people. They have joined or will join the ranks of a social enclave within the urban poor demographic. Labour force participation of these refugees can lead to consequences such as informality, child labour/exploitation in the labour market and increased competition with the host community in low-skill jobs.³⁹

³⁶ "Istanbul's migrant map reflects voting behavior", Hurriyet Daily News; June 18, 2019;

<http://www.hurriyetsdailynews.com/istanbuls-migrant-map-reflects-voting-behavior-133422> (10.10.2019).

³⁷ INGEV and Ipsos Social Research Institute (2017), Refugee Livelihood Monitor (Mülteci Hayatlar Monitörü).

³⁸ Directorate General of Migration Management (August 15, 2019).

³⁹ INGEV (2017). Istanbul Labour Market Analysis.

According to the "Refugee Livelihood Monitor" research conducted by INGEV with Ipsos, which included face-to-face interviews with 1282 Syrian refugees aged 15 and above living in the top ten most populated cities in Turkey, the education level of Syrian refugees is quite low. It is seen that 31.3% of the Syrian refugees aged 15 and above have not received any formal education in Syria or in Turkey. By age groups, half of the Syrian refugees aged 60 + have no formal education. 15% of the adolescents (aged between 15-17) and 28% of young females and males (aged between 18-24) have no formal education as yet (girls and boys combined). Among Syrian refugees aged 15 and older, about 48% graduated from basic and primary education. It is seen that 21% of the Syrian refugees are high school graduates (14% secondary education), whilst the ratio of Syrian refugees who continues to higher education drops significantly (7%).

Table 11. Education Level for Syrians in Turkey

Education Level	Overall	Men	Women
No formal education	31%	34%	29%
Basic education	26%	30%	22%
Elementary school	22%	19%	24%
Secondary education	14%	13%	15%
Higher education	7%	4%	10%

According to the same study, while the rate of working Syrian refugee women is very low (8%), the same rate is close to 50% for male refugees (see table below). The unemployment rate among the Syrian refugees is 17%, this is much higher than national average of Turkey, which is 10.9%. According to the same study, 74% of Syrians state that they cannot find a job that brings regular income. The number of informally employed Syrians is estimated to be more than 635,000.⁴⁰

Table 12. Employment Status of Syrian Refugees

Number of Samples (n)	Total (n=1282) %	Female (n=584) %	Male (n=698) %
Employed	30.1	8.0	48.7
Not working and non-job-seeker / full-time housewife / responsible for house work or child/elderly care	36.5	72.4	6.4
Not working and job-seeker (unemployed)	17.2	9.0	24.0
Student, not working in any job	4.8	4.3	5.3
Student but also working in a job	0.7	0	1.3
Retired	1.2	0.4	1.9
Not able to work due to disability, old age or long-term disease	8.1	5.4	10.3
Other	1.4	0.5	2.1
Total	100%	100%	100%

⁴⁰ Refugee Livelihood Monitor, p.2.

2. SELECTION OF ACTION SECTORS (PHASE 1)

After population and employment status of both economically vulnerable local and Syrian young females and males has been set out in the previous section, the sectoral layout in Turkey and Istanbul will be introduced in this section. On a national level, statistics by TURKSTAT and SGK are used to assess sectoral performances and labour market dynamics from the supply side, meaning the number of employees, labour force participation rate, employment and unemployment rates data disaggregated by sex, youth employment rate, the number of registered employees, etc. To integrate the demand side of the labour market in Istanbul with indicators such as: open and difficult to fill sectors and occupations; reasons of difficult to fill; skills needed for specific occupations, ISKUR IPA Report is used as the main source. Building upon this base, sectors suitable to Syrian young women and men are determined in the light of information received during KILs and FGDs and a workshop conducted during Phase 1 presentation of gender sensitive LMA.

Turkey

According to the statistics studied during the desk research, the top 3 sectors by the highest contribution to gross domestic product (GDP) in Turkey are manufacturing; wholesale and retail trade; and construction. Among the top 15 leading sectors, manufacturing contributes by 17.6%, wholesale and retail trade by 11.9% and construction sector by 8.6% to GDP, summing up to 38% of contribution to GDP⁴¹. Istanbul will be assessed in the following pages; however, it is important to note here that GDP by sector breakdown is not available for Istanbul as detailed in Graph 1. In overall, valued US\$ 257 billion of GDP, Istanbul's economy accounts for approximately 40% of Turkey's economy. Istanbul's GDP surpasses that of about 25 European countries such as Romania, Hungary, Croatia and Luxembourg⁴². Transportation, real estate and hospitality are three of the major sectors that feed Istanbul's economy. Istanbul became a global gateway with more than 70 airlines now servicing Istanbul and offering global connections to 90,000,000 passengers annually. While ranking among the world's major airline companies with its impressive growth figures and already having the world's 4th largest flight network by flying to 301 destinations in 121 countries, Turkish Airlines continues to grow by adding new destinations to its expanding network⁴³. Istanbul has continued to be the top choice of real estate investment for foreign buyers. Residential property sales to foreigners in the city skyrocketed by 103% year-on-year to 1734 transactions, compared to just 854 in May last year. Tourism is another sector that contributes to Istanbul's GDP significantly. The latest data released by the Ministry of Culture and Tourism showed that the number of tourists visiting Istanbul hit a five-year high in the January-April period of 2019. The number of foreign tourists visiting Istanbul made up half of the foreign tourists visiting the country in general⁴⁴.

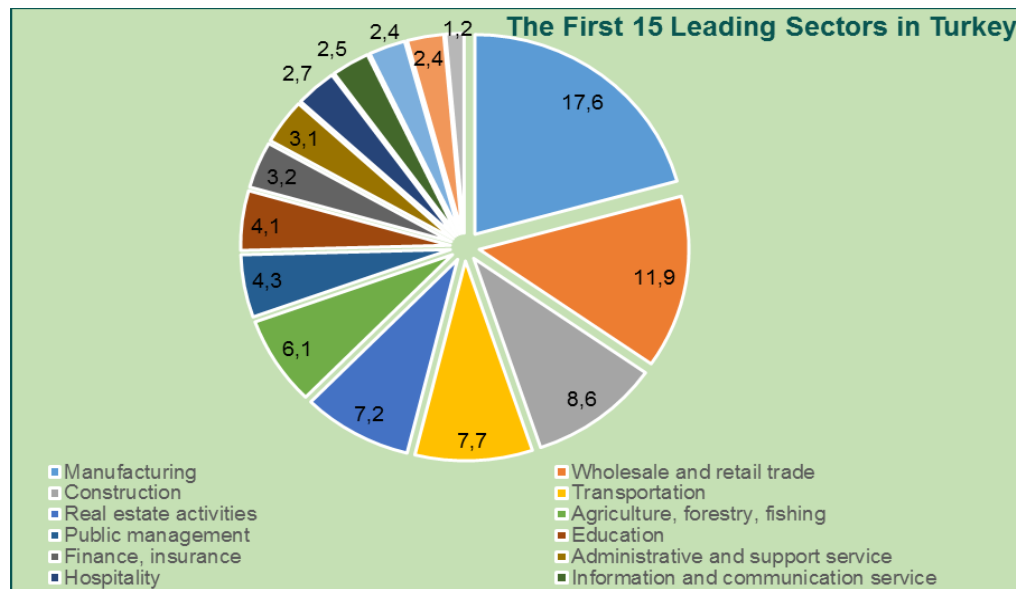
⁴¹ TURKSTAT, 2018

⁴² https://www.istka.org.tr/media/131523/istanbul_fact_sheet_2019_eng_english-web.pdf (10.10.2019).

⁴³ Ibid

⁴⁴ <https://www.dailysabah.com/economy/2019/06/22/winner-of-istanbul-election-to-govern-massive-economic-powerhouse> (15.10.2019).

Graph 1. Top 15 Sectors with Contribution to Gross Domestic Product



Source: TURKSTAT, 2018

With regards to manufacturing, the top 5 growing sub-sectors by turnover index⁴⁵ are;

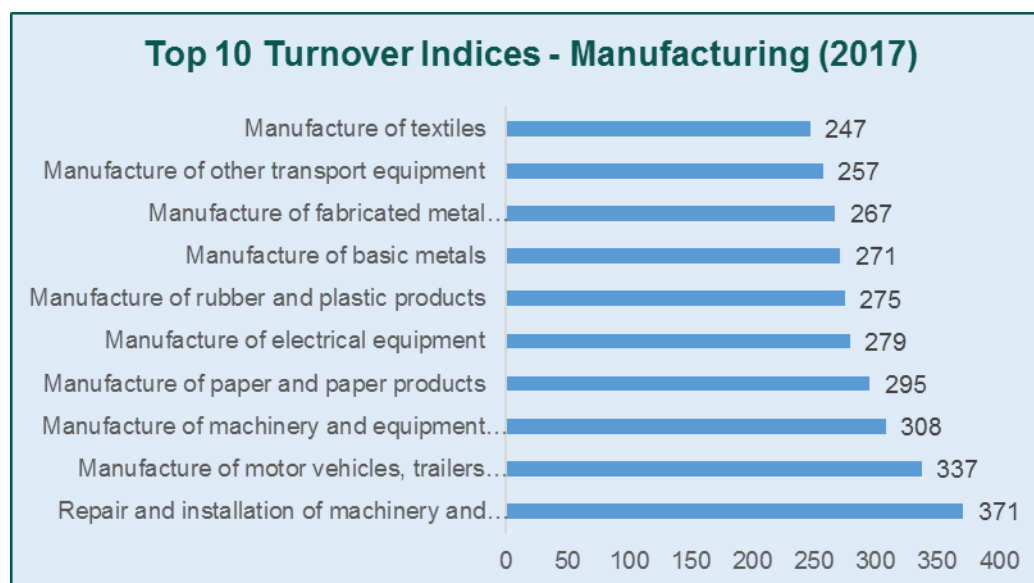
- Repair and installation of machinery (index value of 371)
- Manufacturing of motor vehicles (index value of 337)
- Manufacturing of machinery and equipment (index value of 308)
- Manufacture of paper and paper products (index value of 295)
- Manufacture of electrical equipment (index value of 279)

Annual turnover indicates amount of sales for a given year. The calculation of turnover index is made using the data string from 2005 to 2017. The turnover value for a sector in 2010 is taken as the anchor point and indexed to 100 on the turnover index. Turnover values for the sector in preceding and following years are compared to this base level. Textile manufacturing turnover index jumps to 147 in 2017. This indicates a 47% increase in this sector's turnover compared to the base level of 100 in 2010. This growth is also confirmed by the increase in insured employees in textile manufacturing by SGK statistics and occupations with the most open positions such as sewing machine operator, garment workers, errand person and quality control staff by ISKUR statistics.

The full turnover index table of manufacturing sub-sectors, which shows how much each sub-sector had grown from 2010 to 2017 in annual sales, are included in Annex 4 – Manufacturing Turnover Index. TURKSTAT only provides Turnover Index data for the Manufacturing sector, whereas it supplies Employment and Salary Indices for the Trade and Services sector.

⁴⁵ Turnover index is calculated in order to measure the evolution of the sectors in manufacturing. Calculation is made in consideration of data string from 2005 to 2017 by indexing all the figures to 2010.

Graph 2. Manufacturing Index by Top 10 Sub-sectors, 2005-2017 (2010=100)



Source: TURKSTAT, *Manufacturing Index, 2018*

The sector with the second highest turnover index is wholesale and retail trade. Turkish Statistical Institute (TURKSTAT) does not provide sub-sector breakdowns for the wholesale and retail trade, and bundles this sector with the services sector to come up with the combined classification “Trade and Services”. The subsector breakdowns are provided for the overall Trade and Services index. The table below lists the top five sub-sectors under Trade and Services according to the values of 3 component indices combined (turnover, employment, salary indices). The full list of sub-sector indices is included in *Annex 5 – Trade and Services Index*. With regards to the second largest sector, Trade and Services, the top 5 growing sub-sectors by turnover, employment and salary indices are;

- Air transport (average index value of 305)
- Security and investigation activities (average index value of 266)
- Wholesale and retail trade and repair of motor vehicles and motor cycles (average index value of 214)
- Computer programming, consultancy and related activities (average index value of 198)
- Warehousing and support activities for transportation (average index value of 210)

Table 13. Trade and Services Indices by Top Five Sub-sectors, 2005-2017 (2010=100)

Trade and Services Indices 2017 (2010=100)	Turnover Index	Employment Index	Salary Index	Average Index value
51 - Air transport	401	164	351	305
80 - Security and investigation activities	321	132	345	266
45 - Wholesale and retail trade and repair of motor vehicles and motorcycles	280	112	251	214
62 - Computer programming, consultancy and related activities	278	97	219	198
52 - Warehousing and support activities for transportation	254	114	263	210

Source: TURKSTAT, Trade and Services Indices, 2018

Taking only the turnover index into consideration by itself in graph 3 below, the sub-sectors constituting the top 5 of the Trade and Services index remain unchanged from the average of all indices displayed on the rightmost column of the table 12 above. Other significant sub-sectors for the Trade and Services turnover, apart from those in top 5, are; (1) travel agencies, tour operators and reservations; (2) cleaning activities; (3) motion picture, video and TV; (4) office administrative and office support activities; and (5) postal and courier activities.

Graph 3. Trade and Services Index by Top 10 Sub-sectors, 2005-2017 (2010=100)



Source: TURKSTAT, Trade and Services Turnover Index, 2018

Registered Employees

The number of employees registered under national insurance scheme (SGK) under the Article 4-1/a of Law no. 5510 in Istanbul between 2010 and 2016 increased by 36% from 2,986,050 to 4,050,072. Table 12 lists the sectors with the highest rate of increase in employment and it includes sectors with employment of 50,000 or above. These sectors provide the largest employment in Istanbul.

Accordingly, Retail Trade, Building Construction and Wholesale Trade emerge as the leading sectors with employment of over 300,000 people. The Manufacture of Clothing Industry stands out as the only manufacturing sector with employment of over 100,000 people. In terms of the employees registered under national insurance scheme (SGK), the highest number of increases occurred in; building and landscaping activities, office management and office support services and education. Although these numbers in theory include registered Syrian refugees as well, the number of Syrians actively participating in the labour market is unknown as a result of the high level of informal employment among Syrian refugees. In January 2016, the government began allowing registered Syrian refugees to access formal employment opportunities by making it easier to obtain work permits. However, this has not significantly improved the picture, as only around 65,000 work permits had been issued by the end of 2018, according to the Interior Minister of Turkey.⁴⁶

When the employment growth rates are considered, it is seen that the employment increased by over 100% in the Building and Landscaping Activities, Office Management, Office Support Activities, Food and Beverage Service Activities, Education and Non-Building Construction sectors.

Table 14. Sectors with Highest Increase Rate of Registered Employees Between the Years 2010 and 2016 in Istanbul

	Activity groups according to NACE Rev. 2 classification	Number of Registered Employees 2016	Employment Increase as of 2010-2016 %
47	Retail Trade (excl.Motor Veh.Rep.)	358,710	30
41	Building Construction	315,007	68
46	Wholesale Trade (excl.Motor.Veh.Rep.)	307,069	36
14	Manufacture of Clothing	247,850	11
56	Food and Beverage Service Activities	203,535	75
85	Education	193,255	113
82	Office Mngt, Office Support Activities	135,725	120
81	Building and Landscaping Activities	133,719	211
70	Administrative Consultancy Activities	129,208	-15
49	Land Transport and Pipeline Transport	116,751	-13
25	Manufacturing of Fabrication Metal Products	102,734	4
86	Human Health Activities	96,900	49
52	Storage and Support Act. For Transportation	95,803	42

⁴⁶ <https://www.brookings.edu/blog/order-from-chaos/2019/07/18/syrian-refugees-in-turkey-need-better-access-to-formal-jobs/>

43	Specialized Construction Activities	89,834	-10
80	Security and Investigation Activities	87,219	47
42	Non-Building Construction	74,241	101
13	Manufacture of Textile Products	69,046	13
10	Manufacture of Food Products	63,338	21

Source: SGK, 2017

Istanbul

In Istanbul, the following 6 sectors realize 79.2 % of total employment, 86.1% of open positions, and 79.2% of “difficult to fill” positions as indicated by ISKUR IPA Report of 2018.⁴⁷

- Manufacturing
- Wholesale and Retail Trade
- Construction
- Administrative and support services
- Transportation and Warehousing
- Hospitality and Accommodation

These can be taken as the first priority sectors for unemployed youth, either for the Syrians or the economically vulnerable Turkish youth at first sight. However, looking at these top 3 sectors from gender perspective, all three sectors are dominated by male labour force⁴⁸. 70.8 % of the employees in manufacturing, 68.2% of the employees in wholesale and retail trade and 90.7% of the employees in construction sector are male.

Besides high employment opportunity, it is important to assess top open positions in order to have a better understanding of which industries are flourishing and may be suitable for program direction. According to data of ISKUR, there are problems of supplying the relative fields in the labour market with the needed work force in Istanbul despite unemployment rates higher than national average of Turkey. The number of open positions conveyed to the Agency by employers is increasing every passing year.⁴⁹ When the qualifications of open positions are considered, it is seen that there are vacancies in the occupations requiring low education level such as blue-collar worker, cleaning staff, security guards etc.

⁴⁷ ISKUR Labour Market Assessment (IPA) Report, 2018

⁴⁸ Ibid

⁴⁹ Turkish Employment Agency (2017). Istanbul Labour Market Survey.

Table 15. Employment and Open Positions by Sectors (Full List is in Annex 7)

	No of Comp	Male Employee	Female Employee	Total	% of Empl	% of Open Positions
Manufacturing	10,872	447,546	184,447	631,993	31.5	43.8
Wholesale and retail trade	6,899	209,231	97,478	306,710	15.3	14.4
Construction	4,960	194,860	19,948	214,808	10.7	8.5
Administrative and support service	1,979	140,301	71,806	212,106	10.6	8.5
Transportation and Warehousing	1,747	92,630	21,556	114,186	5.7	3.0
Hospitality, Accomodation and Food Service Activities	2,067	78,832	28,598	107,430	5.4	7.9
Total of sectors with 100.000+ employees	28,524	1,163,400	423,833	1,587,233	79.2%	86.1%
Istanbul Total (20+ employee companies)	35,485	1,389,356	613,965	2,003,321	100%	100%

Source: ISKUR IPA Report, 2018

Overall data indicate that all three top sectors currently have a pre-dominantly male workforce. Looking into top 3 sectors, it is seen that the Manufacturing sector does not only provide the highest number of employment opportunities, but it is also the top sector for open and difficult to fill positions. It provides close to 44% of the open positions (see table above) and 42% of the difficult to fill positions. The Manufacturing sector is followed by the Wholesale and Trade sector, providing 14.4% of the open positions and 14.1% of the difficult to fill positions.

As ‘difficult to fill’ positions indicate lack of interest, motivation and demand from local labour, they present an opportunity for individuals who need an entry point into the formal Turkish labour market, such as many Syrian refugees. Also, required level of education for the top six sectors is “high school or less”, or “not important” as indicated by the employers with regards to the for profile for these sectors.

Although the employment in manufacturing sector in general is dominated by male workers, in some sub-sectors of manufacturing such as textile and apparel manufacturing and food manufacturing, there are also opportunities for female workers. As it will be mentioned in the following section, the top list of open occupations by gender according to the Istanbul ISKUR IPA Report include machine operators in sewing, thread cleaning workers, garment worker, presser, handmade packaging and errand person for female employees. It should be noted, however, that this does not mean that these are necessarily the safest or dignifying occupations.

Table 16. Education Requirements by Top 6 Sectors (last available data with educational data was published in 2016; Full List is in Annex 8)

	Education Not important (%)	High School or Less (%)	University (%)
Manufacturing	44	46	10
Wholesale and retail trade	15	67	18
Construction	10	50	40
Accommodation	23	75	2
Administrative and support service	23	72	5
Transportation	22	44	35

Source: ISKUR IPA Report, 2016

However, as the local language – Turkish – is a major barrier for many of the job positions in each and every of these sectors, detailed analysis is yet to be finalized for the “actions sectors” to be for non-Turkish speaking groups in need to enter the formal Turkish labour market.

Considering the number of female employees in open and difficult to fill positions, the most significant sectors are: Manufacturing, Trade, Administrative and Support Services. Additionally, the share of female employees is relatively higher in Education and Health sectors due to more part-time work opportunities (in 51% and 36,5% of the companies, respectively).⁵⁰

⁵⁰ ISKUR Labour Market Assessment (IPA) Report, 2018

Future Employment Expectations by Sectors

It is also important for this study to understand how the demand for professions in the short and medium term will change in the employment market of Istanbul. According to the results of the ISKUR IPA study, the highest increases in number of employments are expected in i) Manufacturing, ii) Wholesale and Retail Trade, iii) Hospitality and Accommodation, iv) Construction and v) Administrative and Support Services.

Table 17. Open and Difficult to Fill Employments and Future Expected Increases by Sectors

	Open Positions	% of open positions	Number of difficult to fill Positions	% of difficult to fill positions	Expected increase (%)
Manufacturing	26,509	43.8	24,340	42.1	24.8
Wholesale and retail trade	8,725	14.4	8,144	14.1	18.2
Construction	3,868	8.5	5,215	9.0	17.2
Professional, scientific and technical act.	1,795	3.0	1,514	2.6	15.3
Hospitality and Accomodation	4,772	7.9	4,135	7.2	17.3
Administrative and Support Services	5,134	8.5	4,662	8.1	16.0
Transportation and Warehousing	1,818	3.0	2,202	3.8	16.1
Information and communication	3,433	5.7	3,207	5.5	18.8
Education	560	0.9	867	1.5	19.5
Health	1080	1.8	813	1.4	19.2
Other Service Activity	874	1.4	1,562	2.7	19.5
Real Estate Activities	291	0.5	346	0.6	11.7
Finance and Insurance Services	1201	2.0	260	0.4	9.8
Last 4 sector	464	0.9	541	0.9	-
Istanbul (20+ employee companies)	60,524	100%	57,808	100%	19.4% (AVG)

Source: ISKUR IPA Report, 2018

2.1. OCCUPATIONS / POSITIONS

Following an inductive approach, this section now moves from sectors to focus on available occupations and positions under various sectors.

After introducing the situation of main sectors and various sub-sectors in Turkey and Istanbul, the following section assesses the indicators regarding occupation / position *opportunities* in order to provide additional insight in determining action sectors.

The table below shows occupational groups in Istanbul by employment size, open positions, percentages of open positions and difficult to fill positions. According to the table below, the highest number of open positions are listed in;

- Plant and machine operators and assemblers
- Crafts and related trade workers
- Unskilled occupations

These three occupational groups realize 42.3% of employment, 56% of open positions and 45.8% of difficult to fill positions in Istanbul. Rates are important especially for determining occupation groups for potential employment.

Table 18. Occupational Groups in Istanbul by Employment Size, Open and Difficult to Fill Positions

	Male	Female	Total Employment	Open Positions	% Open Position	% of Difficult to Fill
Professionals	185,439	135,218	320,657	5,414	8.9	6.9
Plant and machine operators and assemblers	241,579	63,920	305,499	14,759	24.4	27.6
Unskilled occupations	188,905	91,861	280,767	8,979	14.8	11.3
Clerical support workers	140,893	121,901	262,794	5,256	8.7	5.4
Craft and related trade workers	213,557	47,331	260,888	10,341	17.1	21.5
Service and sales employees	180,317	62,183	242,500	8,121	13.4	12.9
Technicians and associate professionals	155,669	59,302	214,971	6,805	11.2	13.5
Managers	80,678	32,233	112,911	777	1.3	0.6
Skilled agricultural, forestry and fishery workers	2,307	14	2,321	72	0.1	0.2
Istanbul Total	1,389,345	613,963	2,003,308	60,524	100%	100%

Source: ISKUR IPA Report, 2018

The list of top open positions, as generated from the responses by companies with more than 20 employees surveyed in the ISKUR IPA study, are listed in the table below.

The companies included in the ISKUR’s IPA survey marked each open position as “for female workers” or “for male workers” or “no gender difference”. This choice indicates whether the employer has a preference based on gender for the given position. The survey did not delve into the reasons why an employer indicates a preference for a particular sex for a given occupation. It should be noted that reasons could be an outright expression of traits employers associate with women or men, or be a reflection of gender insensitive recruitment policies. The summary findings can be found below.

Table 19. Top List of Open Occupations by Gender

Female	Male	No Gender difference	Final List of Open Positions
Blue-collar Worker (General)	Security Guard	Machine operator (sewing)	Machine operator (sewing) (M/F)
Machine operator (sewing)	Blue-collar Worker (General)	Figuran / extra	Blue-collar Worker (General) (M/F)
Thread cleaning worker	Warehouse staff	Sales representative	Figuran / extra (M/F)
Cleaning Staff	Electrician	Waiter	Security Guard (M)
Accountant	Furniture installer	Blue-collar Worker (General)	Sales Representative (M/F)
Packaging (handmade)	Plastic products manufacturing workers	Garment worker	Waiter (M/F)
Secretary	Metal products installer	Cleaning staff	Cleaning staff (M/F)
Errand person (textile)	Driver	Errand person (textile)	Garment worker (M/F)
Marketing representative	Warehouse staff - handling	Security Staff	Errand person (textile) (M/F)
Customer representative	CNC Freeze Bench operator	Presser	Presser (M/F)

Source: ISKUR IPA Report, 2018

In addition to the open positions in the occupational groups communicated to ISKUR, ISKUR conducted face-to-face meetings with companies having 20 or more employees in order to find out which open positions the companies have difficulty in filling in Istanbul labour market. The table below shows a list of these positions and also reasons behind why certain occupations are “difficult to fill” as indicated by ISKUR IPA report as the result of a survey conducted by ISKUR with employees. The reasons why occupations of sewing machine operator, figuran/ extra, blue-collar worker (general), garment worker and errand person are difficult to fill, are associated with insufficient number of applications. Occupations of security guard, waiter, cleaning staff and sales representative are mentioned for lack of occupational skills. Low number of applications indicates potential job opportunities for Syrian youth due to the gap in local workforce. Also, positions which are difficult to fill due to lack of occupational skills available in the market indicates a potential area for the skills training program in order to increase the employment prospects of the program participants.

Table 20. Top 3 Reasons of “Difficult to fill” by Occupations (Full List is in Annex 10)

	Top 3 Reasons
Machine operator (sewing)	Insufficient # of applications, lack of occupational skills, insufficient experience
Figurant / extra	Insufficient # of applications
Security Guard	Lack of occupational skills, wages and salaries, insufficient experience, work environment
Blue-collar worker (General)	Insufficient # of applications, work environment, wages and salaries found low
Waiter	Lack of occupational skills, insufficient experience, insufficient # of applications
Cleaning Staff	Lack of occupational skills, insufficient # of applications, work environment
Sales Representative	Lack of occupational skills, insufficient experience, insufficient # of applications
Garment worker	Insufficient # of applications, lack of occupational skills
Errand person (Textile)	Insufficient # of applications, insufficient experience, lack of occupational skills

Source: ISKUR IPA Report, 2018

Moving forward, another indicator, looking at the ratio of filled positions to the total number of open positions for various occupations may be helpful to understand further opportunities for employment and the sectors which should be prioritized in a livelihood program. Below, the table for occupations with the most open and filled positions shows that only one third of 450,000 positions were filled in 2017. Whereas almost half of the blue-collar worker (construction) and sales representative open positions were filled; store attendants and cashiers were the occupations with the lowest ratio of filled positions. Male workers are mostly placed in blue-collar (general) and security guard positions. Female employees are mostly placed in sales representative and blue-collar (general) positions.

Table 21. Occupations with Most Open Positions and Filled Positions by Genders

	Open Positions	Female	Male	Work placement	% of Work placement
Blue-collar worker (General)	164,145	12,269	30,038	42,307	25.8
Sales Representative	85,696	26,426	14,703	41,129	48.0
Cleaning Staff	51,568	1,954	15,901	17,855	34.6
Security Guard	39,957	6,502	10,983	17,485	43.8
Blue-collar Worker (Construction)	22,658	73	11,410	11,483	50.7
Waiter / Waitress	21,892	1,956	5,645	7,601	34.7
Clerical Staff (General)	20,685	3,449	2,502	5,951	28.8
Call Center Representative	16,338	1,921	3,110	5,031	30.8
Cashier	14,042	1,863	1,449	3,312	23.6
Store Attendant	13,429	1,588	1,945	3,533	26.3
Istanbul Total	450,410	58,001	97,686	155,687	34.6

Source: ISKUR IPA Report, 2018

The table below demonstrates the skills which are important for the occupations with the highest rate of open positions ranked from 1 to 10 (1 being most important and 10 being least important). Physical competency (meaning the occupations where physical endurance is needed), occupational skills and experience as well as communication skills are the top three domains of necessary professional skills for most of open positions. Marketing and sales skills are especially necessary for sales representatives whilst problem solving skills are mostly needed by blue-collar workers (general) and security guard. The top necessary skills do not show significant difference by gender.

Occupations which require skills that can be learned in a short period of time can be identified through the table below; however, communication skills will still be relatively important for these occupations. Occupations which require lower skills are all available in the textile sector, including; sewing machine operators, garment workers, errand person and pressers.

Table 22. Necessary Skills by Occupations

	Computer Skills	Physical Competency	Analytical Skills	Communication Skills	Project Based Work	Marketing and Sales Skills	Problem Solving	Team work	Foreign Language	Occupational Skills ⁵¹ , Experience
Machine operator (sewing)	6	2	7	4	-	-	5	3	-	1
Blue-collar Worker (General)	7	1	5	3	9	8	2	6	-	4
Figuran / extra	-	-	-	-	-	-	-	-	-	1
Security Guard	7	1	9	2	6	-	3	4	8	5
Sales Representative	4	3	9	2	-	1	5	6	8	7
Waiter	9	1	8	2	-	6	5	4	7	3
Cleaning staff	9	1	7	3	6	8	5	4	-	2
Garment worker	-	1	6	4	-	-	5	2	-	3
Errand person (textile)	-	1	-	4	-	-	5	3	-	2
Presser	-	1	-	4	-	-	5	3	-	2

Source: ISKUR IPA Report, 2018

⁵¹ An ability and capacity acquired to carryout job functions.

Finally, the table below lists occupations which are expected to face an increasing and decreasing demand in the coming year as indicated by ISKUR IPA Report. The top three occupations with the most employment increase expectations are security guards, machine operator (sewing) and blue-collar worker (general). As compared with the prior year, occupations of security guards, machine operators (sewing), blue-collar workers (general), cleaning staff, sales representatives and construction workers have shown an increasing trend in 2018 as well. These occupations have been keeping their importance for the last two years. The top three occupations with the most employment decrease expectations are electromechanics carrier, maintenance technicians, garbage truck drivers and wooden construction moulder workers. None of the occupations are not the same with the prior year.

Looking at the occupations which are estimated to grow in terms of number of employees, sewing machine operator in textile and apparel sector, cleaning in multisectors, sales representative in multisectors, packaging in textile, apparel and food manufacturing can be potential occupations according to the ISKUR IPA Report.

Table 23. Future Estimation by Occupations

Increase	Decrease
Security Guard	Electromechanic Carrier Maintenance Technicians
Machine Operator (Sewing)	Garbage Truck Driver
Blue-collar worker (General)	Construction Moulder (wooden)
Logistics Staff	Support Team (auxiliary services)
Cleaning Staff	Blue-collar worker (Cleaning)
Sales Representative	Job Security Expert (Dangerous-Class B)
Civil Engineer	Other Health Personnel (workplace nurse)
Construction Expert (Usta)	Workplace Doctor
Packaging (handmade)	Servant (public corporation)
Construction Worker	Secondary education teacher

Source: ISKUR IPA Report, 2018

2.2. Key Informant Interviews (KIIs)

Overview

KIIs that were held over the project's first phase aimed to determine which business sectors present the best opportunities for the employment and entrepreneurship of Syrians in Istanbul. This included understanding the general barriers and advantages associated with the workplace practices and business propensities prevalent among the Syrian community.

While FGDs aimed to understand the perceptions and concerns of the members of the Syrian community; KIIs aimed to gather a clearer picture of the labour market's demand side by interviewing employers sector associations, trade chambers and civil society organizations focusing on job placements and trainings.

Interviews for the first phase of the project were conducted over a one-month period starting from June 13th and ending in July 19th, 2019. Although questionnaire for each interview was partially customized based on the expertise and experience of the organization being interviewed, the overall flow of the KIIs were as follows.

Table 24. KII Overview

TOPIC	CONTENTS
Growing Sectors and Testing of Hypotheses related to different sectors	<ul style="list-style-type: none"> - Growing and developing sectors in Istanbul - Ideas on whether sectors such as textiles, garment manufacturing, healthcare, retail and wholesale trade, etc. are promising routes of employment for young refugees
Paid Employment Opportunities suited for young people and refugees	<ul style="list-style-type: none"> - Suitable sectors - Current and expected young worker / employee demand by various sectors - Insights on overall job satisfaction of employees in different sectors - Sectors that are relatively less affected by gender stereotypes
Entrepreneurship Opportunities suited for young people and refugees	<ul style="list-style-type: none"> - Suitable sectors for entrepreneurship - Whether there are barriers against entrepreneurship by women and young people - Required trainings for entrepreneurship for any given sector - Average financial requirements for starting up a business in any given sector.
Government Support	<ul style="list-style-type: none"> - Any government programs targeted at growing a given sector or helping entrepreneurs. - Any regulations that could restrain growth in a sector - Any shortcomings of or barriers to the current legal or regulatory framework aimed at supporting women/ refugee entrepreneurship
Potential Employers	<ul style="list-style-type: none"> - Identifying major players in preferred sectors - Companies that would be more interested in hiring young refugees - Training partners that work with major employers - Obstacles faced by major employers when finding suitable talent
Potential Training Partners	<ul style="list-style-type: none"> - Public or private training partners supporting a given sector - Available Training programs
Durable Solutions	<ul style="list-style-type: none"> - Types of businesses or jobs that would help Syrians integrate into the local business environment or benefit them in case they return to Syria?

2.2.1. CORE FINDINGS FROM KIIs: POTENTIAL SECTORS AND SUB-SECTORS

Below is a list of sectors that are brought up in KIIs as mostly penetrated sectors for young Syrian women and men. Each sector is presented with a description of the main reasons for suitability along with potential opportunities and barriers to watch for.

A particular occupation or sector is deemed suitable as potential route for employment or entrepreneurship if the sector professionals or stakeholders interviewed in this study recommend it after factoring in some or all of the considerations given below;

- Current number of employees in the given sector / occupation type
- Prevalence of existing vacant positions (Demand by employers) and expected rise in number of employees
- Saturation of the market (whether entrepreneurs could tap into unmet demand in a given market or whether existing vacant jobs are easily filled)
- Ratio of female to male employees
- Perceived reputability of the occupation and prevailing attitudes toward the occupation among members of the target group
- Working conditions (including safety, health and psychological issues prevalent in the sector) – *critically important factor* (the sector or occupation must have no significant issues in this respect to be recommended)
- Complexity of the skills and knowledge required for the occupation (relative to job level and salary)

All findings and remarks outlined in this section (2.3) originate from KIIs with stakeholders unless otherwise noted. The findings represent the views of key informants. Reporting of findings is carried out for research purposes only and does not imply endorsement of any of these views by Save the Children. Incorporating findings, also those that may be influenced by gender bias and discriminatory gender norms, is important in order to give an as nuanced picture of the labour market for young women and men as possible and to shed light on issues of gender blindness, bias or discriminatory norms.

TEXTILES:

Textile is among the suitable sectors for entry-level employment. Sewing machine operator was a job that was frequently mentioned. Textile is among the sectors with the largest employee demand. It was however also noted frequently that due to long work hours and difficult working conditions, it has relatively low job satisfaction. Language barrier is not deemed to be significant for manufacturing jobs in general.

FOOD PRODUCTION:

Food production sector presents opportunities for both employment and entrepreneurship. Potential jobs in this sector vary from entry-level worker jobs to experienced and expert-level positions related to production design processes and supply chain management. Entry-level worker jobs include work at production and packaging assembly lines. Language barrier is not deemed to be significant for the food production sector.

IT/ HARDWARE:

IT/Hardware sector offers prospects to both employees and entrepreneurs. Employment in entry-level and experienced positions will potentially grow especially as the need for technical service staff increases. Certain roles can only be taken up with on-the-job training or prior experience. For instance, repair and maintenance services generally require prior experience and/or extensive training. Language barrier however can be less of a barrier compared to other sectors that require more communication and knowledge of Arabic can even become an advantage if position is required to serve Syrian-intensive neighborhoods or Syrian enterprises.

METAL INDUSTRY:

Metal industry presents growing employment opportunities for experienced employees with prior training. Market for entry-level workers on the other hand is not expected to grow. It is also important to note that local community members also compete intensely when it comes to metal industry jobs. As mentioned before, language barrier isn't deemed to be significant for manufacturing jobs in general. This sector is recommended mainly for men by key informants due to the physically demanding tasks involved.

CONSTRUCTION

Entry-level construction jobs have been prevalent among Syrian males, and relatively high availability of these jobs is expected to either continue or grow. However, problems with long hours and unregistered labour considerably reduce job satisfaction and sustainability of jobs in the construction sector. Also, anecdotes about salaries not being paid on time or at all are highly prevalent among the Syrian community, generating a psychological barrier for aspirations toward this sector (regardless of whether such anecdotes are true or not). Any program guiding young people into this sector should closely monitor their feedback in order to gauge the safety and fairness of working conditions. Language barrier is not expected to be a significant issue. This sector is recommended mainly for men by key informants due to the physically demanding tasks involved.

WEB AND APP DEVELOPMENT:

Web and App development presents opportunities for both entrepreneurship and employment. Employees should have prior training on web and app development and can look forward to opportunities in coding, client relations and interface design. Especially for technical jobs language barrier is less significant and knowledge of Arabic could become advantageous for serving potential clients in Gulf countries. Advanced-level experts can also start up their own businesses with an eye to both the Turkish market and abroad. Command of English is important for employees in this sector but not always a prerequisite.

REALTY:

Need for Arabic-speaking realtors are expected to rise due to increased demand from the Syrian community in general and also foreign buyers from Gulf countries. It is also important to note that Turkish Government provides citizenship rights to foreign nationals who purchase real estate in Turkey and the minimum amount required to invest for the purchase was reduced from USD

1,000,000 to USD 250,000 as of September 2018. Business opportunities for both entrepreneurship and employment are expected to go up in the near future. Major real-estate developers have been looking to expand their reach among buyers in Arabic-speaking countries who search for real estate opportunities in Istanbul. This could increase the availability of jobs in this sector.

LOGISTICS

Logistics sectors offer increasing demand for new employees. Syrian refugees could find opportunities as experienced drivers or handling operators. Language barrier is not significant and knowledge of Arabic can be advantageous for routes involving Gulf countries. This sector also presents entrepreneurship opportunities; however, its relatively high up-front costs may be prohibitive and present significant risk. This sector is recommended mainly for men by key informants due to the physically demanding tasks involved.

TOURISM:

Hospitality sector is expected to increase its demand for new employees as the number of tourists from Arabic-speaking countries is expected to rise in the near future. A finding from the Focus Group Discussions indicates that Syrian women tend to regard tourism sector jobs related to sales and client relations as appropriate for themselves as they believe they have better communication skills than men on average. Available jobs are largely expected to be entry level. It is perceived by key informants that job environments in this sector generally provide open areas with numerous employees and customers or guests, which do not usually allow for concealment of any type of sexual or gender-based violence. That is the reason why key informants interviewed in this study did not specifically associate such issues with this sector.

DESIGN, HANDICRAFTS, ARTS AND MUSIC:

One of the findings from the Focus Group Discussions with Syrian women was that design, arts and music is especially appropriate for women who look for self-employment or entrepreneurship opportunities, partially because they want to work at home or at workplaces that do not need to be shared with men. Advanced level artists or those with prior experience in Syria may successfully introduce local Syrian art traditions and styles into the Turkish market in areas such as dancing, folklore, music production, personal or home accessory design or production, and architecture. As Syrian culture is thought to traditionally associate occupations such as design, knitting and weaving with women, key informants asserted that there is a considerable number of Syrian women who had prior experience in weaving and knitting. These businesses could also present e-commerce opportunities for selling to the domestic market or abroad.

BEAUTY EXPERTS AND HAIR DESIGNERS:

Three of the occupations key informants recommended specifically for women were the beauty specialist, skin care expert and hair designer. It was said that Syrian women could find work opportunities as employees in beauty or hair salons. The reason why this was recommended is that the clientele for these services were expected to be mostly women. These jobs serve personal needs of female clients which female employees were thought to understand and respond better. On-the-job training is generally sufficient for entry-level employees although long work hours and dealing

directly with clients may be difficult for some employees. Language barrier could be significant when dealing with Turkish clients, but knowledge of Arabic could also be a plus for locations that are mostly frequented by Syrian or Arabic-speaking clients.

PATIENT, SENIOR AND CHILD CARE:

It is expected that patient, senior and child care sectors could present suitable job opportunities for Syrian individuals who have at least some prior experience in these types of jobs. As employers usually require prior training in care services, care sector jobs are not recommended for entry-level workers. It should also be noted that language barrier could prevent finding work in this area and that there is intense competition for jobs from host community members and immigrants from various countries.

FOOD AND DRINK SERVICE:

This sector presents opportunities for both employment and entrepreneurship. Young Syrian men and women could work as waiters or, if they have training or prior experience, cooks or chefs. Those with access to capital and practical knowledge could also start their own businesses. Knowledge of Arabic could be an advantage if the business is catering to Syrian-intensive neighborhoods or Arabic-speaking tourists. Traditional Syrian cuisine could be profitable when introduced into the Turkish Market.

SOAP AND PERSONAL CARE PRODUCTION:

According to KII findings, there is considerable know-how among Syrian women on soap-making and other handmade personal care products. Entrepreneurs who set up businesses in these areas may introduce innovative products into the Turkish market. This sector is also conducive to e-commerce and exports. For experienced workers this sector could also present employment opportunities in companies that are already established in Turkey by local community members or Syrians.

2.2.2. KII FINDINGS: POTENTIAL MULTI-SECTOR OCCUPATIONAL GROUPS

CALL CENTER

Call center jobs could be advantageous for Syrian women and men in cases where Arabic is required. Sectors including, but not limited to, tourism, realty and food services are expected to increase their demand for Arabic-speaking call center agents who are knowledgeable about Syrian culture and etiquette. However, it was also noted that long work hours and mundane working conditions lead to a high employee turnover in this sector.

ACCOUNTING

There are more than 10,000 registered Syrian companies in Turkey. Around 60% is located in Istanbul. These figures cover only registered companies and exclude unregistered ones as well as sole proprietorships such as grocery stores and barber shops, inclusion of which would drive up the numbers considerably. Lack of familiarity with Turkish legal and regulatory framework as well as with the Turkish Tax System is one of the main barriers Syrian enterprises face in Turkey. Many instances

of accountant fraud and resulting lack of trust in local accountants were also brought up in KIIs. Syrian women and men, being knowledgeable about Syrian Culture and proficient in Arabic, could find prospective work opportunities as accountants serving Syrian businesses. Although considerable training is required for this occupation, there could still be job opportunities in accounting firms as client representation assistants even for those who do not have certified public accountant licenses.

SALES

Sectors such as food-drink service, tourism, real estate development, retail (including clothing, shoes and clothing accessories) that require in-store attendants or one-to-one client relations require sales people with successful communication skills. These sectors also receive increasing demand from Arabic-speaking buyers. These factors present opportunities for Syrian women and men to find employment as sales representatives in these sectors. Experienced sellers with sector-specific knowledge could also start up their own sales offices in certain sectors such as realty or software/web development.

2.2.3. KII FINDINGS: BARRIERS AND OPPORTUNITIES REGARDING EMPLOYMENT AND ENTREPRENEURSHIP

Following is a list of barriers and opportunities that were mentioned in the key informant interviews with civil society organizations, entrepreneurs, employers and trade chambers. These areas may cover barriers or opportunities due to the actions of the government (such as changes to bureaucratic rules or laws and regulations) or the members of the Syrian community as well as the members of the local community such as employers or employees. Progress in these areas could help increase level of employment and successful entrepreneurship among the Syrian community. Hence, they are important to consider for advocacy and awareness raising efforts embedded as part of an integrated livelihood programming. While the barriers outlined in this section mostly apply to both men and women, some of the barriers under the *Business Culture and Work Environment* category differ between the two sexes in terms the “severity” of the barrier.

BARRIERS

➤ BUREUCRACY AND LAWS

“Greatest barriers are employment quotas for Syrians and lack of work permits”

“Main barriers for the Syrian entrepreneurs are the registration and operating license processes”

- More familiarity and better compliance with Turkish laws and regulations will help the Syrian community in accessing the Turkish job market and increase their satisfaction with their work. It is thought that most Syrians work in unregistered jobs. This prevents them from retrieving the financial

and social benefits associated with having registered jobs. It was also noted several times that Kizilay card's benefits are tied to being unemployed and this creates an incentive to work in unregistered jobs. Rules on the Kizilay Card may be changed in a way that allows benefits to continue permanently or at least for a while after the card holder gets employed.

- The employment quota on Syrian refugees is another barrier that restricts employment among the members of Syrian community in Turkey. This is one of the reasons why registered employment is low among Syrians in Turkey. Awareness about the process to get work permits is also low among Syrian job seekers. Work permit applications are to be made by the employer hiring the Syrian employee. For private sector firms, as long as employment quotas are abided by, work permits are relatively straightforward and easy to receive (while Civil Society Organizations may find their work permit applications take more time). However, in some cases employees must demand that the employer applies for a work permit for them, otherwise some employers may try to keep unregistered Syrian refugees on staff without legal work permits to save money on employee security benefits and employment taxes.
- Some local employers tend to see Refugee populations as a source of cheap labour. In order to avoid paying taxes associated with employing workers, such employers may try to keep their workers unregistered. It's important that measures are taken to ensure such employers abide by the law.
- Syrian entrepreneurs could also benefit from more familiarity with Turkish legal framework. Main barriers for the Syrian Entrepreneurs are the registration and operating license processes. Consultancy services by NGOs could help alleviate this problem.

➤ **EMPLOYER AND PUBLIC ATTITUDES**

“Employers generally feel like they go against the wishes of the general public when they hire a Syrian employee. This is mostly due to false information about Syrians spreading among the public”

- There are cases of employers or job placement agencies receiving backlash for hiring Syrians or helping them in the job market. Employers may sometimes be under the impression that hiring Syrian employees will be frowned upon by local employees or members of the local community in general. These perceptions are generally tied to false information that spread in traditional and social media.
- There are also cases where there were conflicts and hostilities between Syrian and Turkish workers working in the same factory or facility. These cases generally happen when new-coming Syrian workers have higher prior work experience and expertise in that particular field than existing Turkish workers. This seems to lead to a significantly competitive workplace environment which may turn hostile.

➤ BUSINESS CULTURE AND WORK ENVIRONMENT

“On average, Syrians are more relaxed with respect to punctuality and complying with work hours.”

“Syrians tend to treat work relations as social relations and aren’t keen on complying with professional rules and hierarchy-based order.”

“Absenteeism is a problem. There are many cases where a Syrian employee simply stops coming to work one day and never returns. This deters some employers from hiring Syrians.”

“Syrians are perceived by employers to be temporary employees in the sense that they do not generally work at the same place for long. Employers consider this a risk as they fear wasting all the time and effort they spent on training their employee.”

- Differences between Turkish and Syrian work cultures were frequently mentioned during KIIs. It was recurrently stated that Syrians tend to be more relaxed about rules of workplace such as working hours. Work culture seems to be different than Turkish people among Syrians. They were said to prefer relaxed and lenient working hours. It was also reported that Syrian workers are have a reputation among employers for frequently asking for permission to leave work early or come to work late.
- There is also a sense among some employers that Syrian refugees are in Turkey only temporarily and are likely to leave soon. Even for employers who do not expect the Syrians to leave Turkey in large numbers in near future, there can still be an impression that Syrians are still in the process of settling down and getting to know the Turkish market. Syrians therefore are thought to be more likely to change their ideas about their workplace after getting hired. For this reason, they are also perceived to be always on the lookout for other job opportunities. This makes Syrians appear to be short-term employees. Syrian employees, during their job search, are advised to talk clearly and confidently about their long-term plans with respect to the job they are applying to. This could serve to at least mitigate any concerns their employers may have about their long-term aspirations.
- Another idea that came up during KIIs is that training services could be provided to increase certain soft skills that would be useful in better adapting to the Turkish Business Culture.
- In certain sectors such as manufacturing and textiles, work hours are especially long and workplaces are usually quite distant from workers’ homes. Syrian community, especially women, are thought by the key informants to be quite displeased by the working conditions in these sectors (an observation that also originated from focus group discussions with Syrian women). It was also thought that Syrian

women however do not have very high awareness of other potential job opportunities or how to learn about them (including through organizations such as ISKUR or United Work).

- Key informants, specialized in women empowerment, state that they receive reports of cases of mobbing and sexual harassment in the workplace. This is thought to be related to the impression on the part of some local employers that refugees under temporary protection, especially women, do not have any means of holding employers accountable.

➤ **PROOF OF COMPETENCE**

“We have many lawyers, doctors and accountants who apply to us, but due to regulations they cannot get certificates of competence in Turkey. They then apply to lower level jobs in order to earn their living”

- Some Syrians with higher education, especially in certain occupation such as doctors or lawyers, cannot find work in Turkey due to the fact that they find it hard to get their degrees, which were received outside Turkey, recognized in Turkey.
- Another finding in the KIIs was that in order to integrate Syrian individuals into the Turkish economy, which would benefit both their livelihoods and the Turkish economy in general, consultancy services could be provided to them on the process to get their degrees recognized. The over-qualified employees otherwise apply to lower level jobs and crowd the market for workers who are not as qualified. NGOs can help provide consultancy on the education system in Turkey and on how to get their degrees recognized specifically through call center or face-to-face consultancy services.

➤ **ENTREPRENEURSHIP**

“Syrian Entrepreneurs generally do not have a meticulous approach; they do not thoroughly search the market conditions, potential competitors, types of customers, potential expenses before they enter a business”

Market analysis is difficult for Syrian entrepreneurs targeting domestic Turkish market as they are not familiar with sources of information. Especially young people are thought to be inexperienced with requirements of successful entrepreneurship. They are considered likely to enter a market without a good understanding of challenges involved. Capital requirements to start up a business and the average time it takes to start reaping profits may vary from one sector to another. Without a good understanding of the risks involved, including which risks are calculable and which do not have easily foreseeable financial limits, entrepreneurs may risk bankruptcy or ruin in the start-up phase.

Consultancy services that are sector-specific or trainings on the general requirements of entrepreneurship may help prevent the harm from potentially ruinous decisions during market entry. Although Syrian young women and men are highly active in establishing networks among each other, especially on social media, and sharing experiences and learning via these channels, details of business operations such as matters related to finance, tax and labour laws may still elude them. They can

however use these channels to cooperate and form partnerships on the execution of different business ideas and entrepreneurship plans.

OPPORTUNITIES

➤ AVAILABLE SERVICES

Various NGOs or public institutions provide job placement or job market assistance to Syrians in Turkey. These include;

UNITED WORK: *“We completed 2500 job placements within last 2 years. 52-54% of these placements involved textiles sector. The rest included call center operations, healthcare, hospitality and tourism. Textile workers include employees from entry level to advance.”*

ISO: *“ISO AND TEPAV’s project Mahir Eller helps Syrians get certifications of competence in Turkey (MYK). MYKs include “Europass” which would help Syrians if they move to Europe in the future. ISO provided assistance to 2000 Syrians. Around 150 were women.*

There are also various incentives to entrepreneurs from government institutions such as KOSGEB.

➤ EMPLOYER AND PUBLIC ATTITUDES

- It is noted in interviews that employers first and foremost value experience and technical skills while other factors are prioritized less on average. This is especially true for manufacturing and technical jobs.
- Employers are much more willing to hire refugees if they have specific expertise; Syrians with technical expertise also find better conditions at work.
- Providing better access to trainings on specific technical skills is considered to be the first line of attack to raise employment and entrepreneurship levels among the members of the Syrian community in Turkey. The details of which technical skills may help the most are outlined in the next sections of this report (on the findings of phase 2 of the study).

➤ EXPERIENCE AND COMPETENCE

- ISMEK continues to provide trainings on job market skills; CV writing and job interviews.
- Also, Syrians aged 18-35 are noted to have well-developed social networks, improved knowledge of the job market compared to when they first settled in Turkey and better command of Turkish or English. These will all help them gain access to job opportunities more quickly and efficiently.

2.3. FOCUS GROUP DISCUSSIONS (FGDs)

In the context of the first phase of the research a total of five focus group discussions were conducted with both male and female Syrian refugees representing varying educational and age levels of the refugee population. During the focus group discussions, the participants' aspirations for occupations, problems and opportunities they encounter, their opinions about gender roles and repatriation to Syria were scrutinized.

Syrian Women Entrepreneurs – Situation, Expectations and Interests

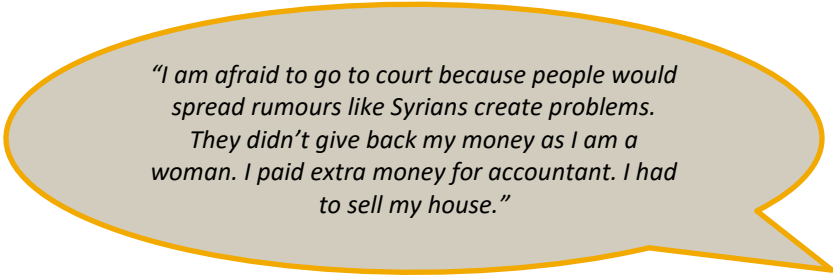
The FGD with Syrian Female Entrepreneurs contributed to the research through showing inspirational stories of Syrian women in different business sectors. Successful stories of Syrian women entrepreneurs demonstrate the challenging processes of initial phases of starting a business and their resilience.

All of the participants could speak basic Turkish, and they were relatively better in understanding of Turkish language. While some of participants (particularly two pharmacists and one Arabic teacher) continue in a sector related with their educational background, the others have preferred to start other sectors not related to their previous occupations (their occupations in Syria were dentist, maths teacher, export expert, media worker and owner of an evening dress store). Given the main needs and urgencies of Syrian refugees in Turkey, many of the female participant entrepreneurs have chosen to continue in other sectors. For the detailed list of the types of entrepreneurs and demographic details please see Annex 3.

Barriers Encountered in the Process of Entrepreneurship

One of the most common problems stated by the participants was that many of them were swindled either by contractors, consultants, accountants or their business partners. Some of them believe there is also a

gender affect they said that they were swindled because they were women. As they lost \$10,000- \$20,000, they had to sell their properties to restart their business.



"I am afraid to go to court because people would spread rumours like Syrians create problems. They didn't give back my money as I am a woman. I paid extra money for accountant. I had to sell my house."

Other barriers are listed as below:

- Because of an unfair competition created by non licensed and illegal other competitors (mostly Syrian) the registered companies' prices for more qualified products were deemed by customers as more expensive in the beginning of their business.
- Because of the enforcement of procedures, they had to recruit at least five Turkish workers to recruit only one Syrian worker.
- Finding a reliable business partner was seen very crucial and at the same time difficult in the beginning of their business.

- They had to deal with work and residence permits while continue to their busy works, a divorced woman with three children particularly stated this issue.
- Some of them could not find a qualified worker to expand their business through entering foreign markets. It was said that short periods of foreign trade or e-trade courses were not enough to be a good employee.
- Most of the participants stated that they suffer from their limited number of customer profiles, because their customers profile is mostly based on Syrians. They complain about not being preferred by Turkish customers.

Required Skills and Education to be an Entrepreneur

The women were asked of required skills and education to become a successful entrepreneur based on their experiences. They highlighted below mentioned requirements:

- Turkish language was presented as the most prioritized requirement and English language was also listed in some of the sectors such as trade.
- Participants repeatedly mentioned about how a good business partner or a leading friend to get help for strategic decisions is critical.
- Participants stated that they needed to be knowledgeable about the laws and procedures such as how to open a case either for business or personal causes such as divorce and early marriage cases.
- Participants also see cultural and social inclusion through women's associations very helpful.

Apart from all these issues, the participants also highlighted psychological aspect of starting a new business. A solid psychology, a patient character and an ability to stand firm were listed as required characteristic features to restart again after each of their losses. Being willingness was also identified as very important for continuation of the started work. This point demonstrates that there is a need for **an encouraging circle** among the new starting entrepreneurs and in some cases **psychological/psychosocial support** services are required for the sustainability of their project. The women who have come together and seen each other the first time in the focus group discussions were happy to hear each other's stories, and they have perceived this as a valuable network among themselves.

The participants said that almost all of their families (mostly their husbands except the single or divorced ones) either from a Gulf or European country supported them in starting business. Moreover, one of the participants said that she was divorced and her brother came to help her in business. One woman stated that her husband did not want her to have a man business partner; therefore, this was presented as a constraining factor of gender perceptions in business.

Regarding the question about grants / funds or trainings supported by Turkish government for entrepreneurs, the Syrian women entrepreneurs said that they did not use any governmental subsidy/fund or grant in their business. Only two of the female entrepreneurs mentioned of NGOs' trainings on entrepreneurship. Therefore, it can be concluded that flow of information about opportunities is still limited for the participants.

Syrian Male Adolescents (Aged Between 15-17) and Youth (Aged Between 18-24) – Situation, Expectations and Interests

During the LMA, Syrian male adolescents and youth were also asked of their opinions about the labour market situation (barriers and opportunities), and skills and occupations that they demand. Syrians adolescents aged between 15-17 and young women and men – “youth” – aged between 18-24 coming from different districts of Istanbul and representing varying education levels and occupations participated in the two FGDs.

➤ Participant Demographics

The length of stay among the eleven participants varies. The shortest period was one year and the longest was seven years. On average, participants have been living in Turkey for 3.8 years. During the two FGDs, it is observed that the ones who has been in Turkey shortest (one to two years) and not included in educational life spoke least Turkish.

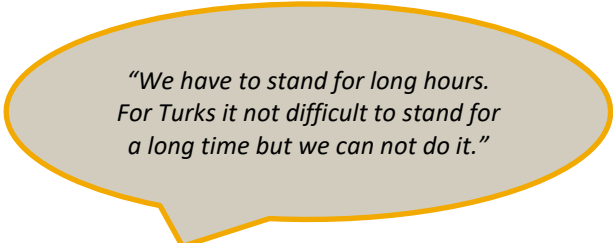
➤ The Problems Encountered at Workplace

During FGDs with adolescents and youth, the common opinion among the participants was how important to work at a job which they really like. Some of them articulated that if there is no love toward the job, it is very probable for them to leave for very minor reasons. Both the adolescents and youth male participants have mainly complained about long work hours, unpaid works and lack of insurance. Some of them complained about the conditions that enforced them to drop out of their schools. They stated that they had to start working immediately after their arrival and could not learn the Turkish language. As they were not given Turkish language courses in the initial phases, they became unskilled workers. According to most of the participants, people in some occupations like doctors and engineers were not allowed to continue their jobs in Turkey. According to them, while Syrian doctors are better than their Turkish counterparts, they earn very little, and engineers work even in the construction sector.

Male adolescents and youth believe that:

- They are either not paid or paid less than their Turkish counterparts
- Syrians work in harder conditions in comparison to their Turkish counterparts

The main difference between the adolescent and youth male participants was that while male adolescents had their first working experience in Turkey, some of the youth males were able to continue their previous occupations. Particularly adolescents who were not able to continue their education stated that they had to apply the unskilled jobs. Therefore, adolescent participants had more complains about physically tiring work conditions with long working hours that in some cases exceeds 12 hours per day. Particularly textile atelier jobs have been associated with prolong standing and moving, and accordingly, some of the adolescent participants feel more exhausted and difficulty in comparison to their Turkish colleagues as they are not



“We have to stand for long hours. For Turks it not difficult to stand for a long time but we can not do it.”

familiar with this type of working conditions. One of the adolescent participants have complained about how heavy smoking has been accepted in some workplaces while even drinking tea is not much tolerated during working hours. Moreover, due to their relations with their employees, Turkish employers have a bad image of them in the eyes of the FGD's participants. Some of the participants have described their Turkish bosses and foreman as being constantly

"In Syria we could drink tea during work, yet here you can only drink during breaks."

shouting and nervous. Another defect of Turkish employers mentioned during the FGD was their exploiting tactics such as sending sewing machines into Syrians' houses to employ refugees until midnights. The participants mentioned all these factors as inconvenient that made it more difficult for them to adjust and adapt to their workplace.

During the focus group discussion with male adolescents, some of the participants have expressed that they would consent to continue low level and difficult/not preferred jobs only to continue their work under good behaving masters and foremen. Therefore, there is a trade off between tiring/more disadvantageous earning and a well-behaved work atmosphere.

"If I love my boss and people behave me well, I can stay although I earn low amount of money."

In addition to the above-mentioned issues related to the workplace, Istanbul as a large city also make conditions more difficult for the male adolescents. According to the participants, the scattered and multi-centered structure of the city does not allow them to meet their needs easily and this even complicate their future plans to start a new business as they are not familiar with the main centres of supply chain channels.

"Obligations are prioritized and I had to revise my aims accordingly. Trade off for safe environment."

During the FGD with male youth, most of the participants stated that they stayed in Turkey to be in a safer place, yet they had different life goals before they came to here. While some of the participants continue to their

previous jobs from Syria, several of them said that they had to revise their aims and they only work for compulsory reasons in unskilled jobs.

One of the participants stated that Turkish employers do not prefer even Turkish diplomas. Turkish employers even do not find Turkish education satisfactory and prefer Western education.

"Turks are very nervous to us because we took their jobs. Yet, if we were not here who would make those jobs?"

➤ **Respected/ Preferred and Not Respected Occupations**

Respected and Preferred Occupations: Adolescent male participants in the FGD identified technology, software, engineering and office jobs as respected jobs from their perspective. In comparison to youth males, occupations within Information and Communication Technology (ICT) is more frequently stated by adolescent males. Working at restaurants and barbershops was also perceived as more respected in comparison to works at textile ateliers. Particularly one of the adolescents, who led the discussions and usually was the first to propose new and distinctive ideas, stated that though he had to drop out from his education after elementary school he had a motivation to continue his education. His best perceived option is following MS Office classes through internet. The only obstacle was his breadwinner position in his household, yet he repeatedly stated his willingness to complete his school. Even only one example like this demonstrates that adolescents with low level of education and high motivation may be chosen for training courses through interviews, and encouraged for the completion of their education by completing one or two years of vocational courses. It is important to identify those people with low education/high motivation and that motivation of the young males and females will help to succeed the path and being role models for the others. These sorts of examples are especially important to demonstrate how these adolescents have high self-esteem and self worth as important elements to work on.

Adolescent male participants listed engineering, medicine, computer science, technical services, electronic and policing as the most favourable jobs both for themselves and the people around them.

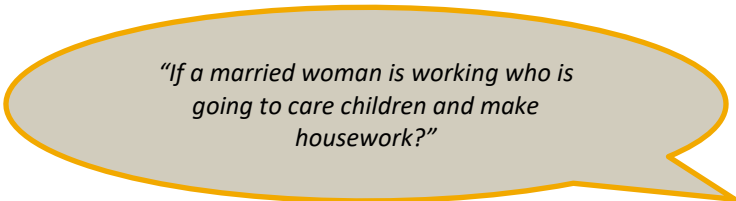
Youth male participants in the FGD identified engineering, being a doctor, graphic designer, politician, photography, production and selling of shoes, furniture production, civil society, health sector jobs as respected jobs from their perspective. Trade was also identified as very profitable work. One university student among the participants stated that from his point of view all the works are respectable and following him, several other participants also repeated the same opinion.

Not Respected/Preferred Occupations: Adolescent male participants were asked of their perception on not respected jobs, and accordingly, working at construction and cleaning were ranked as the hardest and therefore as the lowest level jobs. In addition, selling women's underclothes and working as obstetrician and gynecologist were stated as not convenient jobs from a religious point of view.

Youth male participants were also asked of their perception on not respected jobs, and accordingly, waste paper collection in the streets and being a porter were listed. Working at construction, textile atelier and shoe production were also listed as exploiting sectors for refugees.

Opinions About Women's Inclusion in the Working Life: Adolescent and youth male participants were asked of their opinion about the work conditions found the most convenient for women. Through attributing the

traditional in-house and childcare responsibilities to women, both adolescent and youth males questioned possibility of working for married women. Instead of full-time jobs, participants stated that they would prefer part-time jobs for married



"If a married woman is working who is going to care children and make housework?"

women. Being the only woman in men dominated jobs were also not suggested as convenient for women by adolescent and youth male participants, rather working in women dominated places and factories were more appreciated. Both male adolescents and youth mentioned sexual harassment risks at workplaces. Therefore, work alternatives in safe and not risky environments were highlighted as the primary working conditions.

Respected jobs for women were listed by male adolescents as office jobs and salesperson, and the position of salesperson is associated with selling women's clothing. Making handcraft through working from home such as embroider, sewing and packaging are said to be the most common jobs for particularly elder women. They perceived cleaning, hotel housekeeping, working at a men's barbershop and working as a clerkship which needs to establishing dialogue with men as well for customer relations as disrespected jobs for women. In addition, some other jobs such as engine driver and hard atelier works were also mentioned as inconvenient for women.

Adolescent male participants have stated that women can also work in outside, yet under some specific conditions. For instance, night works were found as unsafe for women as being outside increases the possibility of being subjected to violence. Being the only woman in men dominated jobs was also not suggested as convenient for women. It was also stated by the participants that aggressive nature of bosses and other managers at work environment in Turkey could lead to psychological violence for women since women were identified as more sensitive and emotional in comparison to men.

Youth participants were asked their opinions about how they regard women's inclusion in working life. Accordingly, respected jobs for women were listed as the jobs in safe and public places such as stores and malls. Only one university student among the participants stated that women should work in convenient with their education. Some other participants also stated that women should work in jobs that require qualified and skilled labour. Participants perceive hard works at ateliers and factories as inconvenient for women.

➤ **Favorable Conditions and Factors to be a Successful Entrepreneur and Employer**

According to adolescent and youth, past occupational experience from Syria may provide a distinctive advantage to start a new business in Turkey. Second, rather than conducting a hard work, relatively softer yet in the same time profitable works such as mobile technical support services were appreciated by participants as a better start-up potential. Third, one of the participants mentioned "being at a suitable age" as

"In Damascus you could find most of the things in one place but here is very confusing, arriving to job also takes time."

an important factor to start a new business since the years between the ages of 20s-30s were recognized as the "most energetic years", and decreasing options for

"Government allows to spread of incorrect information."

"After we set up new businesses Turks started to complained more and led to closure of our business."

learning new sectors after a certain age were identified as more difficult to overcome. Fourth, having enough capital in addition to education and knowledge of local language were also listed as main requirements for starting a new business. And

for some specific start-ups like opening a restaurant, choosing places at thoroughfares were also identified as strategically correct beginnings for entrepreneurs.

For the continuation of a new business, the participants listed some psychological and work-related factors. Accordingly, important factors to be successful for an entrepreneur and employers were listed as below:

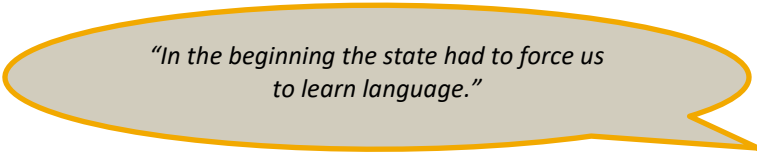
Table 25. Opinions about Being a Successful Entrepreneur and Employer

A successful entrepreneur should...	A successful employer should...
<ul style="list-style-type: none"> - have good and respected relations with customers - have confidence - provide price competition - ensure hygiene in services - choose correct and honest workers, and be able to empathize, tolerant and be forgiving with them - be able to extract capabilities of workers 	<ul style="list-style-type: none"> - be a problem-solving person - have experience - love his/her working environment - comply with working hours, focus to work and not be very talkative during working time - have a level of understanding towards the others - be able to be receptive in the cases of self-faults - behave in a respected manner - be able to express himself/herself in the case of delayed payments

➤ Educational Demands

Adolescent and young male participants were asked for what type of courses they would like to take part for their future plans. Participants in both groups were asked for what type of courses they would like to take part for their future plans. Technology related areas highlighted by the participants of adolescent and youth male groups.

Almost all of the participants expressed their powerful interest for learning technology related areas. Specifically, software programs, computer usage, computer aided design, software programs, machine usage, mobile phone technical support services. Photoshop applications, after affect programs and occupational machine usage courses were highlighted as the most interested issues. Though some participants were poor in Turkish language, they took Photoshop courses at ISMEK centres and evaluated the classes as very beneficial and joyful. They have said their lecturers have paid a remarkable attention to facilitate the classes for them.



"In the beginning the state had to force us to learn language."

Learning Turkish was also expressed by all the participants as one of the priorities in their lives in Turkey.

Participants were asked about the most possible and preferred times for courses.

The courses were mostly demanded to be scheduled in weekends due to tiring working conditions; timing problems did not allow them to participate during weekdays.

Factors prohibiting the participant male youth were listed as:

- Timing problem, as they need to work simultaneously
- Expensive prices for interested courses such as driving license course

➤ Voluntary Repatriation to Syria

For the question regarding their opinion about returning possibilities to Syria, all adolescent males and six out of the seven young males expressed their negative feelings about possibility of returning to Syria. The most relevant reason for the decision of not return was expressed as **too risky** under the current conditions in Syria. They stated that under the current conditions this was an **improbable** option because they were sure of being recruited to military in the case of returning. One of the participants among the male youth stated that if he was returned to Syria, he would have to kill his own people, and he did not want to do this. Additionally, one of the young male participants stated that nothing remained in Syria therefore there is no meaning to return back.

Moreover, the adolescent participants who currently continue their education in Turkey stated that in any case they want to finish their education in Turkey. Another argument brought up in the discussions was the changing economic conditions in Syria because of increasing expensiveness and prices in the crisis environment. Therefore, working here to earn money and send it to their close relatives were said to be more realistic in the current situation from their perspective.

Another participant among the male youth stated that he would prefer to immigrate to a third country that welcomes him because he felt discrimination against Syrians in Turkey. Overall, only one among the seven young male participants expressed his willingness to go back to Syria because he perceived all the stages as experience in his life.

Syrian Female Adolescents (Aged Between 15-17) and Youth (Aged Between 18-24) – Situation, Expectations and Interests

During the LMA, Syrian female adolescents and youth were asked of their opinions about the labour market situation, and the skills and occupations that they demand. Eight female adolescents aged between 16 and 17 and six female youth aged between 18 and 24 from different districts of Istanbul with varying education levels and occupations participated to the discussion.

➤ Demographics of Syrian Female Adolescents Participated in FGD

The length of stay among the adolescent and young female participants varies. The shortest period was three years and the longest was five years for female adolescent participants. And on average, participants have been living in Turkey for 4.5 years. For young female participants, the shortest period was four years and the longest was seven years. Therefore, on average, participants have been living in Turkey for 6 years. Almost all of the participants who are working were able to articulate themselves well in Turkish. Only few of the participants among the adolescent females and one among the youth females were speaking poorly while their understanding was better in Turkish.

➤ The Problems Female Adolescents Encounter at Workplace

During FGD, most of the female adolescent participants complained about that although only one working person can not afford all the expenses of a family, women in their families are not able to find job as they have children. And even the ones who can work are unregistered. As most of the participants were already enrolled in high school, they complained about

very rare work/part-time job options for students. One of the participants stated that they were not recruited

“They do not recruit me because I am 16 years old. I do not have experience and I do not know which jobs fit me. I need to search and try different jobs.”

“Workplaces are not safe, once I was harassed by my boss.”

because they were Syrians. If they were Palestinian or other Arab nationality it would not be a problem. Harassment in the workplace and more specifically intimidation

bosses were told by one of the adolescent females.

Almost all of the female adolescent participants expressed that though it contributes to improve their human relations, working and studying at high school simultaneously is very tiring. Therefore, they would prefer to solely focus on their studies and prepare to university exam (YOS -Foreign Student Exam) rather than working.

"I was sexually harassed by my Turkish boss in a textile atelier as the place was closed space."

During FGD, most of the young female participant stated that Syrian refugees do not like their jobs, and too many of the refugees had to drop their schools. The young females complained about below mentioned specific topics:

- Workplaces contain the risk of being sexually harassed.
- They do not have enough connections in key points to find good jobs.
- Some occupations like doctors and engineers can not continue their jobs, according to the participants, Syrian doctors are better than their Turkish counterparts but they earn very little and engineers even work at constructions (this point was reiterated by both male and female youths).
- Turkish language is still a problem. They were not given Turkish language courses in the initial phases, they immediately had to start to work and could not learn the language and therefore they became unskilled workers.
- They think Syrian workplaces are worse than Turkish ones because Syrian firms are mostly working illegal. According to the participants, Turkish business system is better in terms of minimum wages, and Turkish people stricter on working hours.
- They do not have enough experience to start a job and therefore they do not have enough knowledge about jobs.
- As they do not have Turkish citizenship, they can not find job. Employers do not know procedures, and there is a competition among unemployed people and discrimination against Syrians.
- Their families did not want to continue their jobs after their arrival. For instance, one of the participants' father was contractor in Syria and he did not start a new business in Turkey. Therefore, economic structure of the families changed entirely after their arrival.

➤ **Respected/Preferred and Not Respected Works**

Adolescent and young female participants were asked of the respected and interested job from their perspective.

Both adolescent and young females argued that Arabic/Turkish/English and Japanese languages were very popular in Syria. Therefore, foreign language related jobs like translator and teacher were listed as convenient options.

Being an architecture, doctor and computer engineering were also repeatedly told by both groups as ideal occupations.

"We work as same a Turks but they earn better and they have insurance."

Additionally, participants of the female adolescent FGD identified marketing, office jobs, being a pharmacist, biomedical engineering, surgery, graphic designer, interior architecture and in general all the jobs which request education/qualification as

respected and interested jobs from their perspective. Participants of the female youth FGD identified dentist, pharmacist, lawyer, and jobs in medicine sector, media, healthcare management, cosmetic, research field were listed as respected occupations.

Participants were asked of their perception on not respected jobs, and accordingly, being a cleaning person was commonly addressed as a non respected occupation by both groups. Additionally,

- Working at a factory/heavy industry/textile atelier and working as a female waiter were listed by female adolescent participants.
- Occupations such as hotel housekeeping (reception is acceptable to some extend), secretary and nurse were listed by female youth participants.
- Moreover, departments of agriculture and history do not have job opportunities and therefore these jobs are not preferred according to young female participants. Agricultural engineering was also not preferred by females as it requires to be away from home during rural visits. The female youth participants also mentioned about some jobs that were mostly preferred by males in Syria such as management, economy, and engineering departments. Some jobs in their opinion were not as respected for males such as music, sport, acting career, and fashion designer.

➤ Views on Inclusion in the Working Life

Female adolescent participants think that if a woman is educated, she should work in any decent work or in general at office works. Female youth participants stated that women should not be unemployed in any case, rather than staying and focusing on the domestic works at home they should work. They argued that women should be powerful and resilient. Not only for money but also to gain experience they should work. Otherwise they would be subjected to forced marriage, and even in a marriage life, if a woman does not work her husband will probably dominate their house.

“Why do women have to do housework alone? It should be a common responsibility.”

The female youth also mentioned that Syrian females started to be interested with some occupations such as electric and computer engineering in Turkey while these occupations were not preferred by females in Syria. Additionally, in comparison with Syria, they stated that they were not comfortable in Syria and this societal pressure for them does not exist anymore as they

scattered in Turkey. Therefore, they feel freer in Turkey in terms of participating in society and working. Their families also became more relaxed in Turkey. Moreover, as the risk of early marriage highly visible for females, continuation in the educational and working life is the only option not to be forced to marriage. They stated that while some women had to get marry some others also rescued from forced marriage through finding alternative job options such as translation.

“If men are the only ones working in the household, they would dominate the house. Women should be more powerful and they should definitely work.”

Regarding their perception about the available and preferred work conditions for themselves and women in general, the below mentioned arguments were commonly listed by both of the groups:

- Participants do not want to work at late times (because they need extra time for domestic housework as well). Also, men should not work for long hours.
- Women should not work at jobs requiring (standing) long hours in order to balance between housework/outside work is mentioned (yet two participants did not accept housework as women's duty).

Additionally, adolescents' female participants' arguments are as below:

- Some of the participants were asked in the job application process to change the way they dress and to be open and have closer relations with males. This was perceived as a negative behaviour.
- Participants wish companies would have kindergartens for small children.
- Being the only women at a man dominated workplace is not preferred.
- Workplace should be publicly open because there is a high risk of being sexually harassed (for example textile atelier is found riskier in comparison to restaurants).

Additionally, female youth participants' arguments are as below:

- They should work at skilled works.
- Working conditions should be decent; there should not be discrimination.

➤ **Educational Demands**

The participants were asked for what type of courses they would like to take part for their future plans. Female adolescent participants gave the highest priority to YOS (Foreign Student Exam) courses for university preparation. Female adolescent participants also highlighted their desire to continue their **university studies** in Istanbul because their families do not allow them to study in another city. However, **quota problem** for universities is an important barrier for them. There is a special procedure performed in the university entrance system for both Turkish and foreigner students. In the case of getting the same score with another candidate, the one who is younger in age is more advantageous in comparison to others who have the same score yet older in age. Yet, given the fact that there are lost years because of civil war conditions, and adaptation and transition to Turkish system processes after arriving to Turkey, choosing of younger ages at the last stage in a very competitive university entrance system is an important disadvantage for Syrian high school students in Turkey.

Courses such as upper level Turkish language, other languages like English, Farsi and Russian, MS Office, computer usage, Photoshop, graphic design, sign language and drawing were listed by females in both adolescent and young female participants. Additionally, photography, accounting and cooking were listed by the adolescent females.

Courses such as TV presenter and film making, hairdressing, were listed as interested courses by female youth participants. Additionally, they also mentioned about job placement problems after courses. For example, only taking a Photoshop course is not enough to be recruited by employers, there is a need for a transitional process to be recruited by and to continue the job successfully.

Common factors prohibiting both adolescent and young females from participation to courses were listed as below:

- Timing problem as they study and work simultaneously; they preferred weekend courses.
- Expensive prices for interested courses
- Courses are far from their residential areas, and families do not allow evening courses.

➤ **Voluntary Repatriation to Syria**

For the question regarding their opinion about returning possibilities to Syria, most of the female adolescent participants (six out of eight) and half of the young female participants said that if the conditions make it available, they had positive feelings about returning to Syria. The other two female adolescents said that they would not want to return Syria. One of the female adolescents stated that she had bad memories from Syria, therefore she preferred to stay in Turkey. Another participant said that she came to Turkey in very early age and all the things she learned belong to Turkey. Therefore, she said that same as her family she did not want to return Syria.

Yet, even the ones who want to return stated that they want to complete their education in Turkey and return afterwards. Participants of both FGDs definitely want to continue their mutual relations with Turkey, and they would like to use their experiences and knowledge of Turkish language even after their returning to Syria. Participants expressed their positive feelings about having a chance to learn very diverse/new cultures and people in Turkey, and they could learn to go far away places in Turkey that would not be possible in Syria. They stated that they had a chance to contact with different type of people in Turkey and they improve their personal relations in Turkey. Moreover, they stated that their families' behavior also changed in a positive way not to limit them in daily life.

The young females who felt positive about returning to Syria presented some reasons as below:

- One participant who had to drop her law education and get marry in Turkey said that her conditions were better in Syria. Therefore, she had a strong willingness to return Syria. She said that local people in Turkey looks at her weird as if she "suffered from famine".
- Another participant argued that she feels like a foreigner in Turkey and this feeling will always dominate her feelings during her residency in the country. She also rationalized her return aspirations with the argument that if she returns to Syria, she would be the first person to open a medical center on audiology as she studies at this field in Turkey.
- Another participant said that she and her family want to return Syria, yet the only reason retaining them is that they do not have any relatives remained in Syria.

The ones who don't want to return Syria presented some reasons as below:

- One of the participants said that she came in Turkey at an early age and she learned everything in Turkey. Therefore, she feels more belonging to Turkey.
- Another student who graduated from university in Turkey stated that she established all her social relations in Turkey. She grown up in a Gulf country and later lived in Syria for a short time, and she did not like life conditions in Syria.

2.4. WORKSHOP WITH KEY STAKEHOLDERS

Save the Children and INGEV organized a workshop in Istanbul on July 24th, 2019 with the participation of various stakeholders. This constituted the last step of the 1st phase of the assessment. The workshop involved a presentation of the findings from the literature review as well as from the FGDs and KIIs to stakeholders who are experienced on the issue of refugees in Turkey. The objective of the workshop was to assess the overall findings with the contributions of experienced participants and integrate any additional suggestions and feedback they had into the research process. Besides livelihood experts, also a gender equality specialist attended the workshop.

After presentation of findings, the participants held roundtable discussions about the results and action plans. The outcome of the roundtable study is outlined below under four headings; opportunities, challenges, durable solutions and gender. The views outlined here belong to stakeholders participating in the roundtable discussions and reported by Save the Children without any endorsement.

Opportunities

There were several additional sectors and occupations that were brought up during the roundtable discussions. One is “moulding” (this involves know-how of the CNC machinery operation. CNC stands for “computer numerical control” and consists of automating machining tools by means of a computer). Syrians with prior experience in operating moulding machines generally have expertise in calibration for processing three different types of material, namely; glass, metal and plastic. This is rare in the Turkish job market as operators usually have experience about only one type of material.

Some of the professional services that were among the prioritized occupations during KIIs were also mentioned in the roundtable discussions. For both women and men, these include translation services, public accountancy, training facilitation, financial consultancy, banking, legal consultancy and education consultancy. Other sectors that were additionally mentioned during the roundtable discussions were the arts, sports, urban farming, work at NGOs, care of Arabic-speaking patients in Istanbul, and nursing at hair transplantation facilities. The importance of ICT, food production, retail and arts sectors were also reiterated during the roundtable discussions in addition to sales and translation services.

In the light of above considerations of different sectors, it was concluded that most suitable *sectors* for referral of the Syrian young women and men were ICT, tourism, education / private education, retail and sales, food production, finance and banking, physical and mental health services, translation services and urban farming.

Methods through which Syrian young women and men can be integrated into the Istanbul job market was another topic that was touched upon. The consensus was that internship and on-the-job training opportunities were among the most effective methods. Tax reduction methods for hiring Syrian men or women and introduction of new KOSGEB and other incentives tied to employment of Syrians were brought up. Other methods that were discussed included; promotion of Syrian entrepreneurs, providing certification to Syrians for their skills, networking and mentorship activities in relevant sectors and introducing new municipal services specifically helping Syrians in seeking jobs.

Challenges

Another subject covered during the roundtable discussions was the challenges that Syrians face when trying to access the labour market in Istanbul. Listed among the most significant challenges were;

- Legal status of Syrians who cannot work in fields which are not permitted for foreigners under Turkish Laws.
- Bias by employers who are hesitant to hire Syrians instead of local community members.
- Lack of opportunities to have their educational degrees recognized in Turkey or continue their education here.
- ESSN card acting as an incentive for remaining unemployed as its benefits are terminated once the card owner is employed.
- Post-traumatic Stress Disorder, which prevents Syrians from fully adapting to life in Turkey and feel psychologically ready to go through the stresses of working life.
- Lack of soft-skills such as CV preparation, conducting job interviews and knowledge about the methods for finding out about job opportunities.
- Lack of information sources and hotline which can be used to learn about work permits and labour laws.
- Family barriers for female youth, which socially prevents them from chasing job opportunities, including familial pressures that put responsibility of child-care on women.

Discussions also covered potential routes of action to mitigate the challenges. Recommended courses of action were as follows;

- Strengthening collaboration between public stakeholders and international or domestic non-governmental organizations.
- Balancing NGOs' contributions between employment and entrepreneurship. Currently there is much more attention on employment while entrepreneurship support could be more conducive to job creation and the domestic economy is already undergoing period of relatively high unemployment.
- Advocacy for development of social policies by the Government of Turkey regarding livelihoods generation by young women and men from Syria. Also, existing social policies should be standardized over different geographical areas of Turkey, urban and rural areas alike.
- Advocacy campaigns including public service announcements and video clips for Syrian refugee issue in order to increase awareness among the Turkish public about the plight of refugees and also about the fact that the term "refugee" doesn't refer to a set of overarching character traits that all Syrians in Turkey possess but is merely a legal status. It's important to remind the public and Turkish employers not to generalize and also that many people with various professional skills and personality traits live under the refugee status.
- Social cohesion activities at the school level; Syrian children and local children should be brought together in school activities.

- Establishing entrepreneurship centers for guidance and mentorship on financial literacy, product design, social media use, web design and development as well as for offering hard-skills and soft-skills training.

Roundtable discussions also covered whether there are any sectors or occupations that would be inappropriate for Syrians. It was the overall consensus that attention must be paid to ensure that members of the Syrian community are guided away from jobs which reinforce gender stereotypes and suppress personal development of women as well as those that are less likely to provide safe work environments, psychologically and physically. Sectors or jobs that were specifically mentioned were patient care, cleaning services, cooking, manufacturing jobs in the textile sector and beauty salon jobs or hair-dressing.

Durable Solutions

Another subject of discussion was based on determining the sectors that are most conducive to development of durable skills that can still be beneficial in markets other than Turkey; such as Syria or any other resettlement country. On the other hand, durable skills are also helpful towards local integration of those who are willing to settle in Turkey permanently as it makes it easier for them to find jobs that are more robust against economic fluctuations or can be transferrable in the event of immigration to different cities within Turkey.

Sectors that were deemed to be especially advantageous are tourism and service sectors; information and communication including social media specialization or graphic design; translation services; metal industry and automotive parts manufacturing; education; environmental engineering; agriculture; construction; child and elderly care; art production such as dancing, rug, carpets or soaps.

Strengthening the links between Syrian and Turkish youth was also a priority in the roundtable discussions. Links should be established in ways that reinforce cooperation rather than competition in employment and employability. Artistic activities or social events could bring together Turkish and Syrian youth in meaningful ways. Supporting joint academic or entrepreneurship initiatives could also be helpful. Using mentoring and reverse mentoring could support matchmaking activities. Social media can also be utilized for dissemination of a positive tone. Social work departments of various universities could be called on to facilitate the interactions between Turkish and Syrian Students.

Preparation for return to Syria was another talking point. It was the consensus that there should be a needs assessment research for Syria in order to understand and foresee potential issues that could make life difficult upon returning and recommend ways to mitigate their effects. Supporting development of Arabic-language skills among Syrian young women and men in Turkey is also vital. An orientation plan should be put in place for young Syrian people who will have spent the majority of their lives in Turkey and might face adaptation problems upon returning to Syria. Consultancy and mentorship services on business life in Syria could also be offered. Syrian cultural heritage should be kept alive for the Syrian young women and men with events such as Syrian music days or film festivals. If possible, young Syrian people should have access to psychosocial support before their return. To the extent that it might be assumed the Syrian young women and men will find a country in need of rebuilding upon their return, it will be beneficial that young Syrian people are equipped or at least familiar with skills and knowledge on topics such as public administration, social policy and public policy beforehand.

Gender Dynamics

Three main subtopics of the roundtable discussion on gender were i) constituents of a gender-safe working environment, ii) sectors that can currently provide such work environments and iii) employment opportunities for Syrian young females and males that are not gender-restrictive.

There was a consensus that one of the main factors that underpinned safety is an open working environment, i.e. workspaces where any verbal or physical interaction between co-workers are easily visible to others. Having female managers or senior staff deemed to be an advantage in this respect. It was thought that Syrian women were more likely to open up to female managers about private matters. It was also said that safe workspaces would have proper complaint mechanisms in place so that incidents, including cases of sexual harassment, could be reported anonymously. This would make it easier to report the incidents, legally hold the establishment responsible and also identify the guilty individuals so they cannot harm others.

It is important to note that individuals from Syrian in Turkey – as individuals from other countries as well – may feel like outsiders at their workplaces and fear social repercussions if they openly blame perpetrators of violence or harassment. Therefore, a safe working environment would also be socially welcoming as well as provide support on how to address issues like discrimination or harassment in a safe and ethical manner.

Another main factor for establishing a safe working environment has to do with working conditions. Long hours and distant workplaces make life hard for Syrian women in Turkey. A safe work environment therefore is said to have regular work hours or offers scheduled shifts so that no single individual has to work overtime in an excessive manner. Short commutes were also emphasized because going to locations too distant from their homes make people coming from outside Turkey uncomfortable and stressful.

There was also emphasis on the need to prevent normalization of discrimination, harassment and violence in the workplace. Roundtable participants agreed that the first step is to articulate that these are not part of normal behaviour and should not be expected as such. Both members of the local community and refugees should be trained in how to spot and react to violations of their rights and safety at the workplace. Higher awareness about the potential dangers and means of countering them were thought to have a positive impact on reducing both the frequency and magnitude of such incidents. It was also agreed that government inspections and monitoring should take workplace safety for refugees and host community members alike as a priority.

One finding from the FGDs that also came up during roundtable discussions was that Syrian men and women both want jobs that focuses on their intellect and not on their physical abilities. Such jobs will be more conducive to the progress of their career and are thought to provide more equal opportunities for Syrians with respect to job benefits and salary levels.

Some of the key sectors that could provide the conditions outlined above are thought to be the same for males and females. These include finance where Syrians in Turkey can get work as accountants, translators, graphic design, call centres serving Arabic-speaking clients, software coding, caregiving and media (such as radio stations). Logistics was also emphasized, although it requires plenty of physical labour. In reference to FGDs where an interest was expressed in ICT jobs, such as web designer and technical service staff, the ICT sector was also mentioned during the workshop as a sector providing a safe working space. This sector was also recommended for its flexible working hours and workspace locations.

Further occupations that avert a gender restrictive environment were held to be teaching occupations in the education sector, handicrafts, photography, sales representatives, store attendants, administrative support staff (such as communication assistants) and NGO positions focusing on Syrian refugees.

3. WRAP-UP: SELECTED ACTION SECTORS

Bringing together findings from the desk research, FGDs, KIIs and the resulting roundtable discussions with key stakeholders, it was decided that the phase 2 of the gender-sensitive LMA will focus on the following sectors and further explore occupational groups and jobs available for young Syrian women and men under these target sectors;

Table 26. Action Sectors in consideration

- Manufacturing
- Wholesale and Retail Trade
- Information and Communication Tech.
- Education
- Health
- Construction
- Hospitality and Accommodation

Table 27. Occupations under Action Sectors

The table below displays a summary of the findings from the 1st phase of the gender-sensitive LMA. The 2nd phase of the project is to delve further into the so-called “Action Sectors” for young Syrian women and men. An “X” mark on an occupation row indicates that this particular occupation is recommended by the research method shown in the corresponding column. The gender for which the occupation is recommended by the KIIs or in FGDs can also be seen on the corresponding column. As for desk research, the X marks on one of the gender columns indicate that this gender is more prevalent among the employees of this occupation.

OCCUPATIONS	ACTION SECTOR	DESK RESEARCH		FGDs		KIIs	
		Female	Male	Female	Male	Female	Male
Sales Representative (especially in Arabic)	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade; Hospitality and Accommodation	x	x	x	x	x	x
Waiter	Hospitality and Accommodation	x	x		x	x	x
Garment Worker	Manufacturing (esp. textiles, clothing, shoes);	x	x	x		x	x
Thread Cleaning Worker (Quality Control)	Manufacturing (esp. textiles, clothing, shoes);	x		x		x	
Packaging (handmade)	Manufacturing (esp. textiles, clothing, shoes); Food Manufacturing	x		x	x	x	
Secretary	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade; Hospitality and Accommodation	x				x	
Marketing Representative (especially in Arabic)	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade	x		x	x	x	
Customer Representative (especially in Arabic)	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade	x		x	x	x	

Health personnel (nurse, translator, administrative staff)	Health, Hospitality and Accommodation	x		x		x	
Education personnel (Arabic teacher, administrative)	Education	x		x		x	
Software / Web development / ICT Graphic Design		x		x		x	
Cosmetics / Beauty Expert / Hair Dresser	Hospitality and Accomd.			x		x	
Call Center Operator	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade; Hospitality and Accommodation			x		x	x
Child Care Worker	Health, Education	x		x		x	
OCCUPATIONS	ACTION SECTOR	DESK RESEARCH		FGDs		KIIs	
		Female	Male	Female	Male	Female	Male
Security Guard	Manufacturing (esp. textiles, clothing, shoes); Wholesale and Retail Trade; Hospitality and Accommodation	x	x		x		x
Warehouse staff	Manufacturing (esp. textiles, clothing, shoes); Food Manufacturing		x				x
Electrician	Manufacturing (esp. textiles, clothing, shoes); Food Manufacturing, Construction		x		x		x
Furniture Installer	Wholesale and Retail Trade; Manufacturing (esp. textiles, clothing, shoes);		x		x		x
Plastic Product Manufacturer worker	Manufacturing		x				x
Metal Products Installer	Manufacturing		x		x		x
Driver	Hospitality and Accommodation		x		x		x
CNC Freeze Bench Operator	Manufacturing		x		x		x

4. EMPLOYMENT PATHWAY (Phase 2)

4.1. SECTORAL ANALYSIS

According to all the collected data from the first phase of the research through FGDs and KIIs, the action sectors with suitable employment opportunities that align with a gender sensitive perspective are determined as **Wholesale and Retail; Production of Textile and Shoes; Production of Food; Education and Research; Health; Hospitality; ICT; and Construction**. Moreover, most of these sectors contain significantly **entrepreneurial and multi-sectoral job** opportunities.

In this section, beginner/entry and middle level job opportunities and small/micro business entrepreneurs for selected sectors will be analysed in detail, whilst being mindful of gender stereotypes and opportunities for prompting more inclusive labour markets for women and men. All the findings of KIIs and FGDs from a sub-sectoral perspective with a value chain approach.

Overall, Turkish skills seems to be a supportive factor to successful performance on the labour market for all sectors and job opportunities. There are job opportunities that require very low skills of Turkish, but they are not sustainable and does not include any career opportunities. Therefore at least a basic level of Turkish language is a must before any skills training.

Overall, this chapter is informed by the KIIs, which included questions relating to each phase of the value chain for each of the action sectors. In other words, employment or entrepreneurship opportunities for the different steps in the value chain were uncovered by different key informants involved in the second phase of the project. Unless otherwise noted, all findings in this section stem from the views of the stakeholders and sector professionals, and reporting of these views do not imply the endorsement by Save the Children.

4.1.1. Manufacturing: Textile/Apparel, Shoes and Food Production

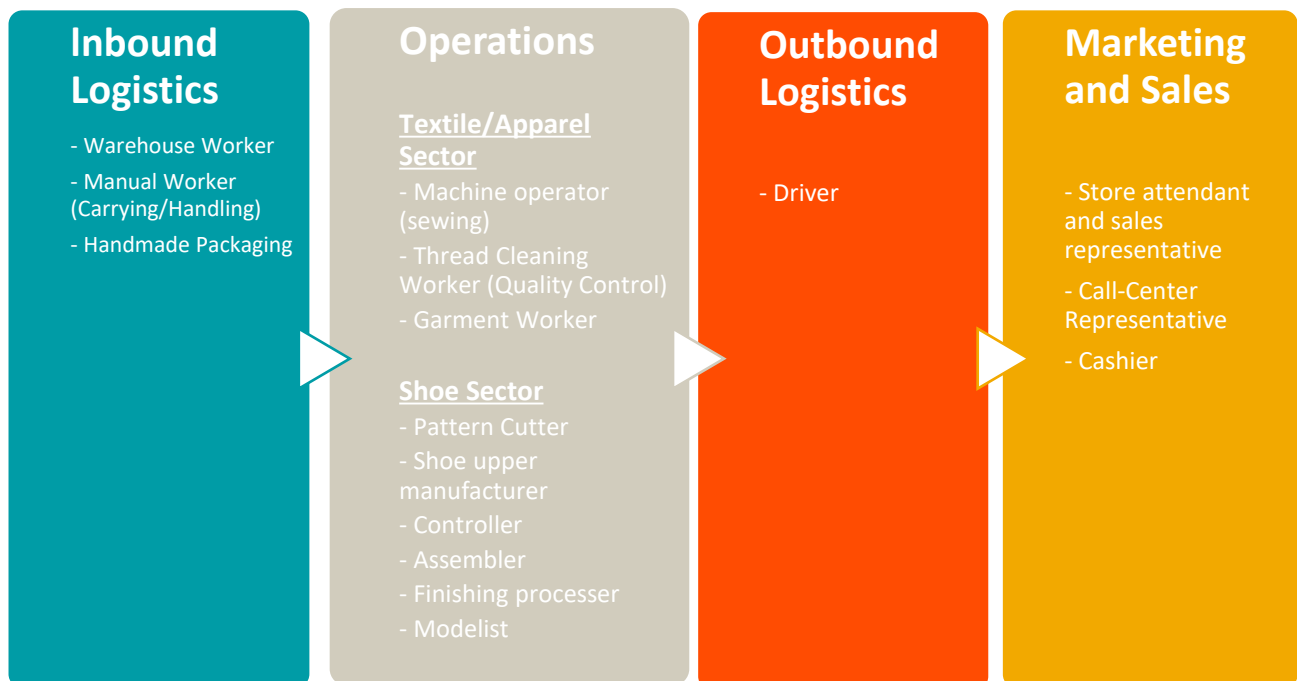


Under the title of “Manufacturing”, three different sectors will be analysed: (i) **Textiles / Apparel**; (ii) **Shoes**; (iii) **Food Production** (see Graph 4). All these three sectors involve manufacturing and wholesale / retail processes, which is important as they can offer possible decent employment opportunities for young women and men.

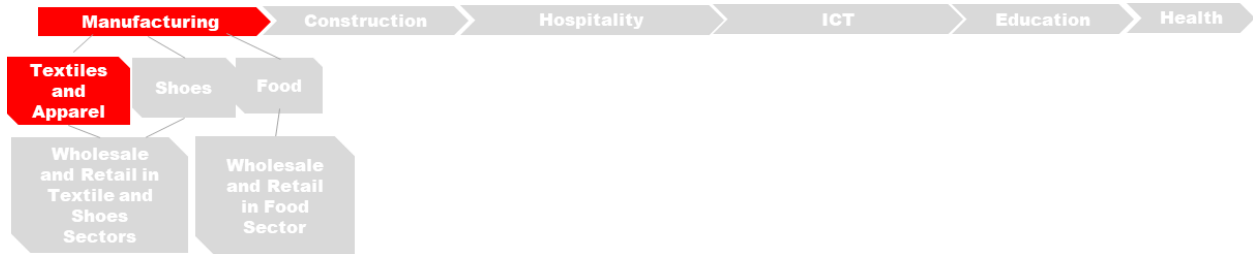
The value chain for Textiles/Apparel and Shoes is analysed jointly as the manufacturing and retail processes for these sectors have common/similar job definitions. The value chain for the Food Production Sector is however analysed separately, as the sector entails different occupations from the other two.

The results of the value chain analysis of the three sectors and the suitable/relevant positions associated with them are displayed in the graph:

Graph 4. Value Chain Analysis for the Textile/Apparel and Shoes Sectors



Manufacturing in the Textile and Apparel Sector



Turning to the key findings with respect to the Textiles / Apparel sector, textiles-manufacturing turnover displays a positive trend with the turnover index increasing from 100 to 247 between 2010 and 2017. In relation with the figures of Clothing Retail more specifically, textiles production in Turkey has undergone an increase during these years. This growth is also confirmed by the increase in registered employees in textile manufacturing by SGK statistics.

During the KIIs, it was indicated that driving factor for the growing manufacturing in textile sector has been increasing export opportunities rather than domestic markets. Clothing retail firms aim to expand their distribution channels through opening new stores in different regions in all over the world. Large-scale textile production firms have also mainly targeted European markets for their growing exports. Unlike other production sectors, distinctive factor of the textile sector lays on its low level of dependence on the imported raw materials. Therefore, fluctuating exchange rates in money markets have been relatively less of a determinant for production costs. Labour costs constitute the principal production cost for the textiles sector in Turkey. These continue to be sourced locally so exchange rate volatility, which significantly affected other sectors that are more reliant on imports for their production processes, has affected textiles to a lesser degree. Export-oriented textiles production in particular has contributed to a rise in employment in the otherwise contracting domestic job market.

Textile is a sector that face difficulty to find employees and the sector came forward as already penetrated by Syrians. Textile sector has improved in Turkey since 1980s, yet the firms have been trying to gain competitive advantage in prices through low labour costs and hence unregistered or short-term labour has become more advantageous for employers. The main reason for being highly refugee intensive sector is because the sector requires short-term labour, limited language skills and less education. Therefore, the sector has a potential for entry-level positions for Syrian young women and men in need to find an entry-point to the formal Turkish labour market, particularly at the production level. Although the employment in manufacturing sector in general is dominated by male workers, textile and apparel manufacturing also present opportunities for female.

As indicated in ISKUR's 2018 Istanbul Labour Market Report, top list of open occupations includes machine operators in sewing, thread cleaning workers, garment worker, weaver, presser, handmade packaging, and errand (ortaci) person. The most unskilled works are errand or packaging, and if workers demonstrate their effort and skills, they may develop their carrier as weavers or sewing operators. In the later stage their carrier they may be promoted to leadership positions, though it should be noted that our interviewees stated that being a production supervisor in the production line requires an assertive character.

Despite the signs of possible employment potential in the Textile sector, there are also important points to be very cautious about, in order to ensure low risk, decent and gender sensitive livelihood opportunities for youth. As highlighted through the KIs and known from other sources too all in-depth interviews, KIs and focus group discussions provided us these noteworthy niceties as listed below:

First, particularly very vulnerable youth and even children have been employed in the illegal and small under the counter type of production. Particularly garment dye and denim-washing processes under illegal production areas create unhealthy conditions for directly affected (particularly male) workers, and all dyes and hazard chemicals end up in the water through washing. Therefore, this uncontrolled production both creates direct risk to workers and damage the environment. Moreover, in the process of sewing, potential hazards include finger, hand and eye injuries from the needles and blades. Therefore, setting and adjusting finger guards and safety glasses before the work starts constitute a critical part of the work safety.

Our interviewees informed us that particularly small-scale contract manufacturers avoid audits and even the owners divide their production areas into different areas to make it easier for them to avoid probable audit. Therefore, while empowerment of technical skills of vulnerable youth is one of the ways to protect them from the unhealthy and precarious/legally unsecured employment conditions, there is need for a more holistic, system-based risk management which require a strict state control over the manufacturing firms. Providing vulnerable youth education on the using sewing, overlock seam and binding machines will be very beneficial in the first phase of their empowerment against exploitive, unqualified production and unregistered working conditions. In addition, particularly export based medium and large-scale corporate manufacturing factories should be chosen as employers as strict control and auditing in these corporations makes them safer in comparison to their smaller counterparts.

Taking into account how Turkish textile and clothing industry suffers from long working hours, gender inequalities, unpaid overtime, permanent/daily working, unregistered working conditions and absence of strong unionism, finding correct manufacturers constitutes very critical part of the employment strategy in the next stage of the occupational training. Even very known clothing retail firms raise doubts, as many of them prefer to work with non-audited small-scale contract producers.

Second, it is evident that wide range of textile and clothing industry occupations provides employment opportunities for women in the clothing production process. There are several reasons for the women-intensive labour in textile industry. Textile manufacturing industry is one of the most competitive sectors in Turkey, and rather than material costs, labour cost constitutes the main spending item for employers. This is one of the main factors which causes more exploitive conditions to emerge in the labour-intensive sectors. This is also related to traditional gender roles in Turkey. Women are perceived as cheap labour by employers as they demonstrate greater acceptance toward unregistered and seasonal works. Traditional family structure in Turkey attributes more responsibility to men as the primary breadwinner and women are perceived as secondary-level contributors to the family budget.

Therefore, employers particularly rely on women labour for entry level, temporary, unskilled and low-paying jobs. Moreover, traditional upbringing of women from very early ages in Turkey make them more prone to needlework, and whenever they are in urgent need of employment, textile manufacturing jobs appear culturally more attractive to them. Some studies explore the reasons why women continue to

work in the textile industry despite its many disadvantages. Women seem to legitimize their choice based on their previous experiences in home-based sewing, and they perceive themselves as more inclined to these types of occupations.

Our qualitative research and general composition of workers reveal that women mostly work in the textile production sector before getting married because of difficulties due to long working hours, irregular work conditions and payments. This poor working environment result in a situation where young women mostly aged between 16-25 constitute the main source of labour for the industry. Employers treat women as if they are disposable and easy to replace. In the textile and clothing industry women are more likely to be positioned as unskilled packaging and quality control workers. Consequently, supporting women into more skilled labour rather than entry level will help make them better-paid employees, which is foundational for any livelihood support program to take into account. Recruitment of women under improved working conditions will also encourage them to go on for longer in working life.

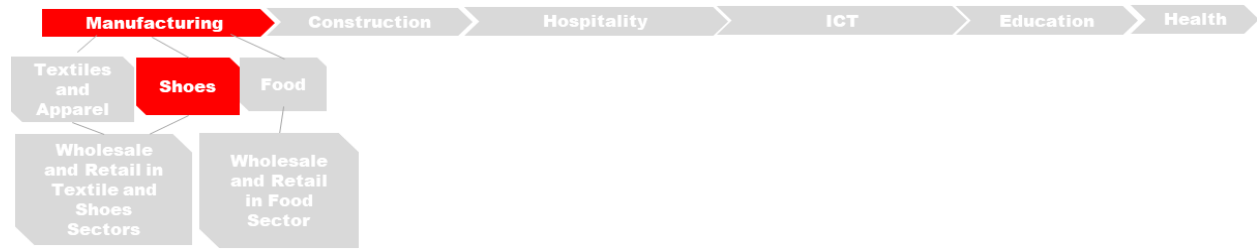
It should be noted that, apart from improving their technical skills, higher awareness of their rights and business regulations in general will be invaluable in achieving better work environments for women. Men's awareness on these topics should also be increased. In general, awareness of employers should also be addressed with respect to gender sensitivity, especially regarding the implementation of effective monitoring systems at the workplace to detect and improve any gender-exploitative practice, attitude or behaviour.

Table 28. Textile / Apparel Job Opportunities

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Sewing Machine Operator	Perform all sewing functions, tailors and performs seamstress work necessary to fix/repair torn or damaged garments. Operates industrial sewing and pressing equipment.	Sewing machine operation skills.	Hardworking, Perseverance, Flexible	Basic / Pre-Intermediate Turkish	Male or Female	Elementary School	100 TL (daily) 2,020.90 TL (registered)	Indoor
Ironer	Works to iron in the last stage before packaging. They are also exposed to extended night works.	Able to stand up for long hours. On the job training.	Physical endurance, Hardworking, patient.	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	100-120 TL (daily) 2,020.90 TL (registered)	Indoor
Manual Worker – carrying, handling	Carries and handles products produced at a textile workshop.	Unskilled labour. On the job training.	Hardworking, Perseverance, Flexible	Basic Turkish	Male or Female (Mostly younger)	Elementary School	1,000-1,500 TL per month or 70-80 TL per day (mostly unregistered). 2,020.90 TL (registered)	Indoor
Handmade Packaging	Assemble, seal, scan, and load parcels in order to ensure that each one is safely delivered to its destination.	Unskilled labour. On the job training.	Hardworking, Perseverance, Flexible, Attentive, Responsible	Basic Turkish	Mostly Female	Elementary School	1,000-1,500 TL per month or 70-80 TL per day (mostly unregistered). 2,020.90 TL (registered)	Indoor

Garment Worker	Garment workers cut and sew fabric and other materials into clothing. These workers perform one task in the production of many garments, rather than performing all the tasks required to produce a piece of clothing	Skills related to specific sewing machinery equipment	Communication, Problem solving, Flexibility	Basic Turkish	Male or Female	Elementary School	2,020.90 TL (registered)	Indoor
Thread Cleaning Worker (Quality Control)	Examines garment and parts for defects, such as unfinished raw edges, broken buttons or hooks, uneven stripes or plaids, puckers in seams, loose threads or stitches, or incorrect packaging assortment.	Skills related to quality control	Communication, Problem solving, Flexibility	Basic Turkish	Male or Female	Elementary School	1,000-1,500 TL per month or 70-80 TL per day (mostly unregistered). 2,020.90 TL (registered)	Indoor

Manufacturing in the Shoe Sector



Shoes manufacturing industry has a remarkable potential for particularly entry level labourers as turnover rates are very high in the sector. Though the sector suffers from unregistered and small-scale production, there are still medium and large-scale factories are keen to formally recruit Syrian young women and men in their production line with social security. Manufacturing risks are also lower in the larger scale manufacturing factories.

Similar to other sectors in Turkey, shoes industry also tries to expand its export-oriented manufacturing to compensate the cost of imported raw materials. The amount of shoes export increased from \$768,000,000 to \$888,000,000 between 2017-2018. The main export partner of Turkey is Russia with \$132,000,000 and Iraq (\$83,000,000), Germany (\$61,000,000), Saudi Arabia (\$32,300,000) followed according to 2018 export amounts.⁵² Therefore Syrian young women and men have an opportunity not only in production but also in other white-collar departments as being designer, export expert, store attendant and even human resources official (because some of the factories have hundreds of Syrian workers). Upper intermediate level of Turkish is expected from white-collar workers. According to our interviewees, recruitment of Syrian refugees becomes highly advantageous because of government's subsidies for the recruitment of refugees and Syrian young women and men. It is also stated that this recruitment has decreased the turnover rate of Turkish labourers.

One of our interviewees stated that women are particularly more skilful as shoe upper manufacturers and sector representatives want to increase the number of females in this part of the production. Yet this task exists mostly in the small-scale factories working as sub contractor. Apart from 6 to 8 months of training, on job training is also suggested as the first phase of the experience. Being a supplier for foreign shoe brands requires compliance with minimum workplace safety standards of manufacture. Therefore, if an entrepreneur targets international markets rather than being small player in the domestic market, he/she should invest large amount of money in the production line.

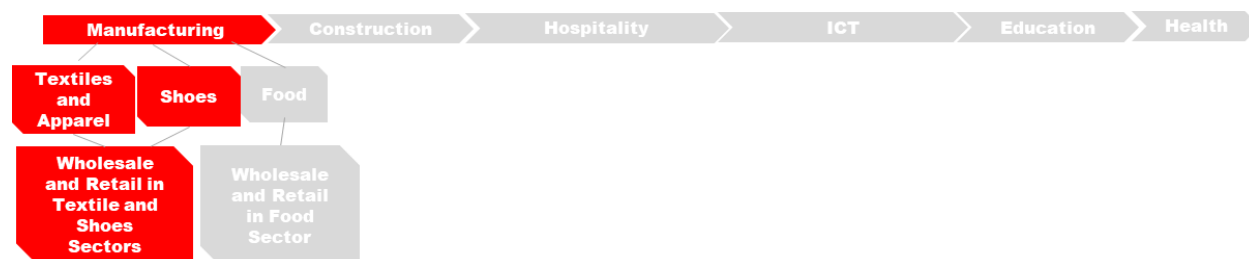
The Turkish Footwear Industry Research Development and Education Foundation (TASEV) is the main establishment in the training activities of the sector's qualified workers. Though the sector has a vocational high school, it is stated that the graduates of the high school do not prefer to work in the manufacturing factories as blue-collar workers, rather they aim for the white collar and more stylistic occupational areas. Therefore, it should be noted that competition is high in this part of the sector for the positions "above" blue collar. When designing and implementing programs to transition Syrian young individuals into the labour market, due attention needs to be paid to socioeconomically vulnerable host community adolescents and youth in order not to exacerbate tensions.

⁵² <http://www.hurriyet.com.tr/haberleri/ayakkabi-ihracati> ; <http://www.hurriyet.com.tr/ekonomi/2018de-250-milyon-cift-ayakkabi-ihrac-edildi-41138315>

Table 29. Shoe Manufacturing Job Opportunities

Position	Technical Skills	Soft Skills	Language Skills	Existing Aspect	Gender	Minimum Education	Average Salary	Work Environment
Cutter	Unskilled labour. On the job training. Knowledgeable about the manufacturing process.	Hardworking, Perseverance, Flexible	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)		Elementary School	2,020.90 TL	Indoor
Shoe upper manufacturer	Knowledgeable about the manufacturing process. Good in crafts making.	Hardworking, Perseverance, patient.	Basic Turkish	Male or Female		Elementary School	2,020.90 TL	Indoor
Controller	Unskilled labour. On the job training. Knowledgeable about the manufacturing process.	Hardworking, Perseverance, Flexible	Basic Turkish	Male or Female		Elementary School	2,020.90 TL	Indoor
Assembler	Unskilled labour. On the job training. Knowledgeable about the manufacturing process.	Hardworking, Perseverance, Flexible	Basic Turkish	Male		Elementary School	2,020.90 TL	Indoor
Finishing processer	Unskilled labour. On the job training. Knowledgeable about the manufacturing process.	Hardworking, Perseverance, Flexible	Basic Turkish	Male		Elementary School	2,020.90 TL	Indoor
Modelist	Knowledgeable about computer and design programmes	Hardworking, Perseverance, Flexible	Intermediate Turkish	Male		High School	2,500-3,000 TL	Indoor

Wholesale and Retail in Textile/Apparel and Shoe Sector



During Phase 1 of the LMA, the Wholesale and Retail Trade sector came forward as the second largest employment group in Istanbul by 15,3%. It is also one of the most growing areas of employment with the increasing turnover index figure; retail trade turnover index for 2016 was 109.5 that increased to 155 in 2018 (2015 turnover is considered as 100). According to the data obtained by TURKSTAT on Retail Turnover Index, especially the below areas of wholesale and retail trade seem to have more opportunity to grow;

- Online retail and retail trade through postal services (80% increase)
- Textile, clothing, shoe and leather products retail trade (45% increase)

Table 30. Retail Turnover Index

Retail Type	Years	Turnover Index (2015=100)
Retail Trade (except motorized vehicles and motorcycles)	2016	109.5
	2017	130.3
	2018	155.0
Online Retail and Retail through Postal Services	2016	112.1
	2017	140.5
	2018	202.0
Textile, Clothing, Shoe and Leather Products Retail Trade	2016	112.7
	2017	131.8
	2018	163.4

Source: TURKSTAT, 2019

The chairman of the Association of E-Commerce Operators (ETID) is confident that Turkey's e-commerce sector will continue to improve by between 30% and 35% in 2019 alone. This continued growth stems from a variety of different sources, including Turkey's emerging online shopping culture driven by its young, digital population. Electronics and media are the top-selling product categories in the Turkish e-commerce industry, accounting for almost half of the country's total e-commerce sales. This is followed by Turkish furniture and appliances, which represent \$1,180,000,000 worth of market share.

While there is significant growth in the figures for the textiles, clothing, shoe and leather products, an assessment by the Chain Stores Association (KMD) shows that this is due to;

- Price increases
- Changed purchasing habits of consumers as they are keen to purchase during special day campaigns and promotions
- New store openings (especially important for the increase in employment)
- Company acquisitions / mergers, joint ventures etc.

The KMD represent a group of companies responsible for the employment of around 400.000 people. The employee turnover rate is around 70% and is especially high among store attendants, sales representatives and entry-level positions. All the positions in retail and wholesale trade are stated to be opportunities for refugees to enter the labour market, however key informants for this LMA mentioned more cashier and sales representative as well as store attendant positions. Among the most important barriers of recruiting refugees, difficulties in getting work permits, difficulties in communicating with rest of the staff either in Turkish or English and lack of experience for sales and cashier operations are cited by the interviewee. Required minimum education level for all positions is stated as high school.

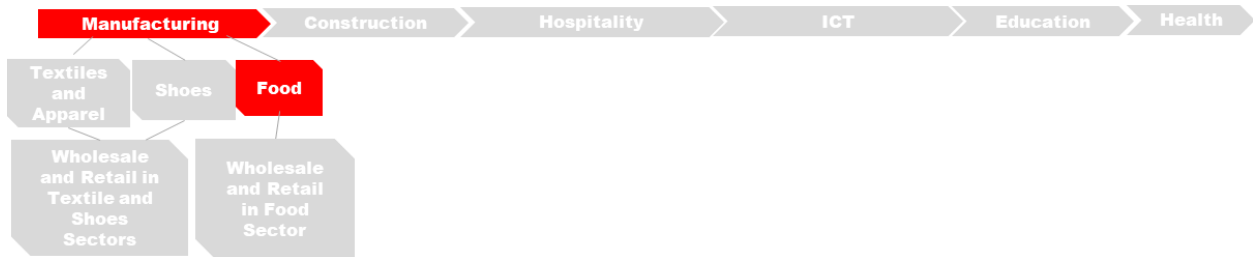
According to the representative of a very well-known apparel retailer, the impact of economical crisis in Turkey has a great negative impact on spending. Export makes 40 to 50% of the company's total sales and also one of the reasons for them to stay alive. Especially shoe production is becoming less viable as several of the shoe companies are closing one by one. For this company in particular CIS, MENA and Far Eastern countries seem primary markets for expansion in focus. They have not recruited any Syrian refugees yet, however it is thought that the sector store and sales positions would have the most potential. Arabic and English languages would be an advantage; knowledge of Turkish would be necessary for communicating with the internal team. 6 months of trial period is practiced. No career path is defined for these positions. Minimum wage plus sales incentive is given. Competencies expected for these positions are good communication skills and proper oratory. The store managers usually give trainings. For the positions at the company's central office, bachelor degree and a good command of English are mandatory.

Below are the specifics of the job opportunities discovered during desk research, FGDs and KIIs which are deemed suitable for Syrian young women and men.

Table 31. Retail Job Opportunities for Textile/Apparel and Shoe Sector

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary (Net)	Work Environment
Cashier	Operates cash register.	Money handling, Basic calculation	Trustworthy, Communication Client Oriented, Problem Solving, Analytic	Yes, Turkish needed	F & M	High School	2,020.90 TL	Indoor (market, store)
Store Attendant / Sales Representative	Sells products and provides customer services to consumers on the floor.	Sales skills, team work ability, communication skills, analytic skills, flexibility	Communication Proper oratory, Client Oriented, Problem Solving, Analytic	Yes, Turkish needed. Knowledge of Arabic and English is an advantage	F & M	High School	2,020.90 TL + sales incentive	Indoor (market, store)
Warehouse Worker	Responsible for the ordering, receiving, and storing of incoming material or merchandise.	MS Office, Tagging, Packing, Forklift operation	Attentive, Responsible, Organizational skills	Basic Turkish	M (Key informants estimate that there are significantly more males than females who are involved with this occupation)	High School	2,020.90 TL	Indoor (warehouse)
Call-centre Representative	Handles inbound telephone calls by providing information to customers, makes outbound calls to provide potential customers about the company's services and products.	Data entry, Database management	Communication, Problem solving, Client oriented, Cultural orientation	Turkish, or Arabic with some Turkish skills if Arabic call-centre	F & M	High School	2,020.90 TL	Indoor (office)
Driver	Loads, unloads, prepares, inspects and operates the delivery vehicle.	Driving	Attentive, Flexibility	Basic Turkish	M	Elementary School	2,020.90 TL	Outdoor

Manufacturing in Food Sector



The Food Manufacturing Sector is also highly affected by the fluctuating exchange rates and mostly export-oriented firms are able to maintain their market sharing. Increased raw material prices reflected to final products leads to disadvantage in the competitive markets. Food additives and mixture are the main ingredients in the production process. Because of the complex structure of the food processing process, interviewees for this gender-sensitive LMA have suggested potential employment to be found in traditionally more familiar type of food production areas such as Syrian sweets, bakery and patisserie.

Particularly the production process of Syrian sweets requires long years of experience. Therefore, chefs' low turnover rates are very important for the sector. At least five years of experience is expected and mainly males are preferred, as the work requires physical endurance. Syrian sweets sector also complains about the competitive production environment and low level of Turkish customer in the domestic market. Therefore, critical location choices for the *marketing* of the produced foods and *export-oriented* manufacturing need to be considered in order to expand the sector. In the existing situation, countries such as Japan, the U.S.A. and Germany are the main buyers for the Syrian foods. Arabic communities in European countries also constitute the main part of the buyers.

Key informants predict lowest level of entrepreneurial factory investment as 250.000 TL and medium scale factory as 1,000,000 TL.

Graph 5. Value Chain Analysis for the Food Sector

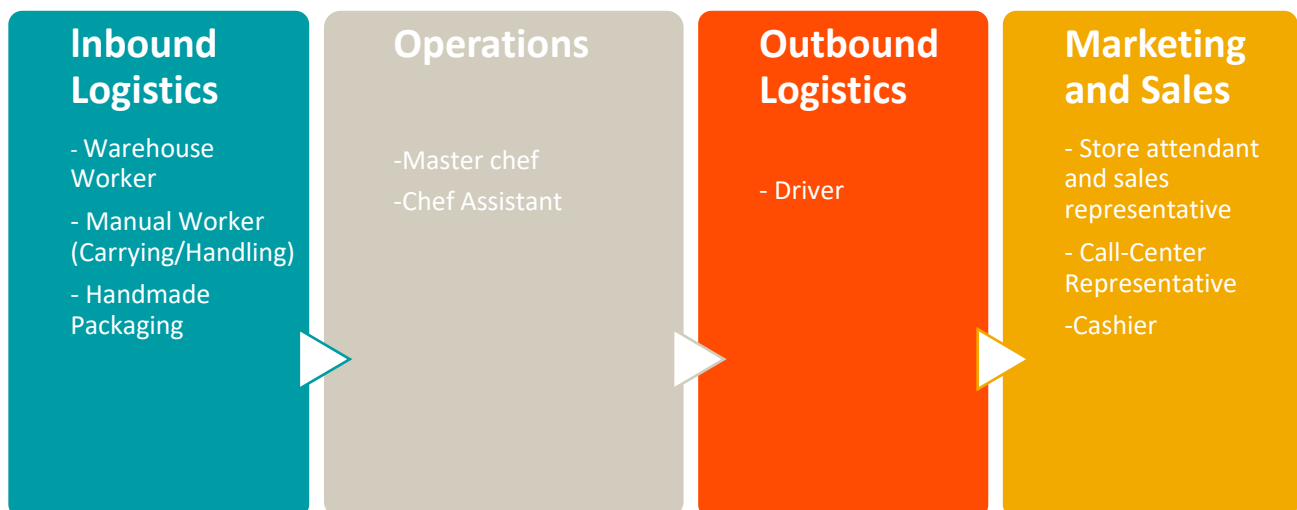


Table 32. Manufacturing of Food Sector Job Opportunities

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary (Net)	Work Environment
Master chef	Responsible for all the rolling of dough and decides to ingredients of the products.	Physical endurance, patient, at least five years of experience in the work. Hygiene is very important.	No need	Basic Turkish is enough	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary schools	4,000 TL	Indoor
Chef assistant	Responsible for the ingredients of the products.	Hardworking. Hygiene is very important.	No need	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	2,020.90 TL	Indoor
Packaging	Packaging the products	Hardworking. Hygiene is very important.	Perseverance, Discipline, Speediness, Politeness	Basic Turkish	Male / Female	Elementary School	2,020.90 TL	Indoor

Wholesale and Retail in the Food Sector



Looking at the Retail Turnover Index, food retail is among the sub-groups expected to display considerable growth;

- Food, drink and tobacco retail (37% increase)

Table 33. Retail Turnover Index

Retail Type	Years	Turnover Index (2015=100)
	2016	109.5
Retail Trade (except motorized vehicles and motorcycles)	2017	130.3
	2018	155.0
	2016	112.1
Online Retail and Retail through Postal Services	2017	140.5
	2018	202.0
	2016	111.6
Food, Drink and Tobacco Retail	2017	128.8
	2018	153.8

Source: TURKSTAT, 2019

The situation, however, is more nuanced than what is seen at a first glance. While there appears to be considerable growth for the food, drink and tobacco retail sector, a situation similar to that described for the textiles sector is at stake here. The General Secretary of Food Retailers Association (GPD) has stated that this growth does not indicate a growth in productivity per se. Rather, the growth results from:

- Price increases
- New store openings (especially important for the increase in employment)
- Company acquisitions / mergers, joint ventures etc.

Nevertheless, several positions in the food retail sector, which are emphasized to be compatible with refugees, are still expected to grow in terms of their demand for employees. Barriers stated by the key informants against recruiting refugees have to do with getting work permits and language barriers. Positions of packaging and storage workers at the store as well as cashier, sales representative and store attendant in neighbourhoods densely populated by Syrians are named as the positions where language

barriers do not pose significant problems. Minimum requisite education level for all positions is stated to be primary school.

Positions that involve interacting with clients are stated to require special training either directly by the employer or an outsourced provider. These trainings should centre on effective and professional communication, negotiation skills and detailed information about the merchandise being sold.

Another rising trend for food retail was declared to be online sales and home deliveries by website or phone. Rising demand for delivery people and packaging workers was mentioned in connection to this trend as well. Arabic-language website and social media management is also said to be positively affected by emerging online sales channels.

Table 34. Wholesale and Retail Job Opportunities for the Food Sector

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary (Net)	Work Environment
Cashier	Operates cash register.	Money handling, Basic calculation	Trustworthy, Communication Client Oriented, Problem Solving, Analytic	Yes, Turkish needed	F & M	High School	2,020.90 TL	Indoor (market, store)
Store Attendant / Sales Representative	Sells products and provides customer services to consumers on the floor.	Sales skills, team work ability, good communication, flexibility, analytical thinking.	Communication Proper oratory, Client Oriented, Problem Solving, Analytic. Hygiene is very important	Yes, Turkish needed. English is an advantage	F & M	High School	2,020.90 TL + sales incentive	Indoor (market, store)
Warehouse Worker	Responsible for the ordering, receiving, and storing of incoming material or merchandise, the daily transfers. Some of them are responsible for export operations	MS Office, Tagging, Packing, Forklift operation Export operations.	Attentive, Responsible, Organizational skills, Hardworking,	Intermediate Turkish, Intermediate English	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	High School	2,500-3,000 TL	Indoor (warehouse)
Call-center Representative	Handles inbound telephone calls by providing information to customers,	MS Office, Data entry, Database management	Communication, Problem solving, Client oriented, Cultural orientation	Turkish, or Arabic with some Turkish skills if Arabic call-center	F & M	High School	2,020.90 TL	Indoor (office)

	makes outbound calls to provide potential customers about the company's services and products.							
Accountant and administrative staff	Handles accounting operations and partially responsible for export operations.	MS Office, Accounting programmes, export operations	Communication, Problem solving, Client oriented, Cultural orientation	Intermediate Turkish, Intermediate English	F & M	High school	3,000-3,500 TL	Indoor (office)
Driver	Loads, unloads, prepares, inspects and operates the delivery vehicle.	Driving	Attentive, Flexibility	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	2,020.90 TL	Outdoor

4.1.2. Construction Sector



As detailed in the section on review of the existing economic literature and data, Construction is among the top 3 sectors with the highest contribution to Turkey's GDP. It's also among the economic sectors that employ the largest number of people. Its employment figures have been steadily growing since 2010 and are expected to grow in near future. It has been thus chosen as one of the most promising sectors for this study, especially with respect to the employment pathway.

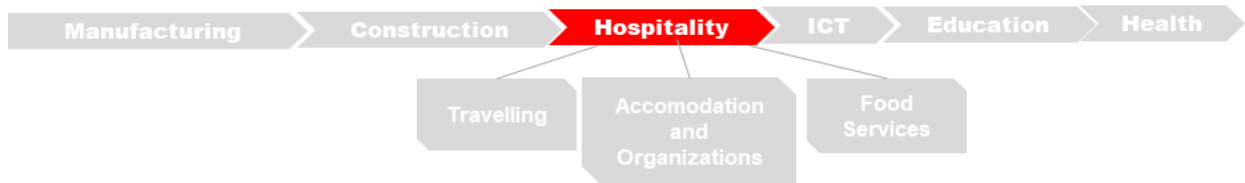
Construction and housing sectors are among the main sectors highly affected by the fluctuating financial conditions in Turkish economy in the last years. In Turkey the sector decreased by 12.7% in the second quarter of 2019, and the number of construction workers fell from 2,095,000 to 1,983,000 in 2018. In addition to seasonal changes, increased construction costs (26%), labour costs (17%) and material costs (30%) are reflected as increases in the prices of housings and consequently supply and demand unbalances fluctuates the construction sector. Because of the safety hazards and risks related to construction sector conventionally the most unskilled workers hired by employers, and due to risky conditions high number of unskilled Syrian workers who do not have any other work choice penetrated in the construction sector. Leading workers into the firms that are expert in managing the risks properly is the most important point for the sector.

Below are the occupations that are in highest demand and require shorter skills training compared to other available occupations. Because these occupations are all at operations level, a value chain analysis is not provided. Though all the disadvantageous aspects of the sector, it has a labour-intensive work type as it provides employment to around 2,000,000 people in Turkey. Being a more skilled and experienced worker can be an important selection criterion as construction sector is facing a liquidity problem and difficulties in finding skilled labour. As the sector tries to minimize cost, they try to work with who offers the cheapest price, and there are differences in the salaries of Turkish and Syrian workers.

Table 35. Construction Sector Job Opportunities

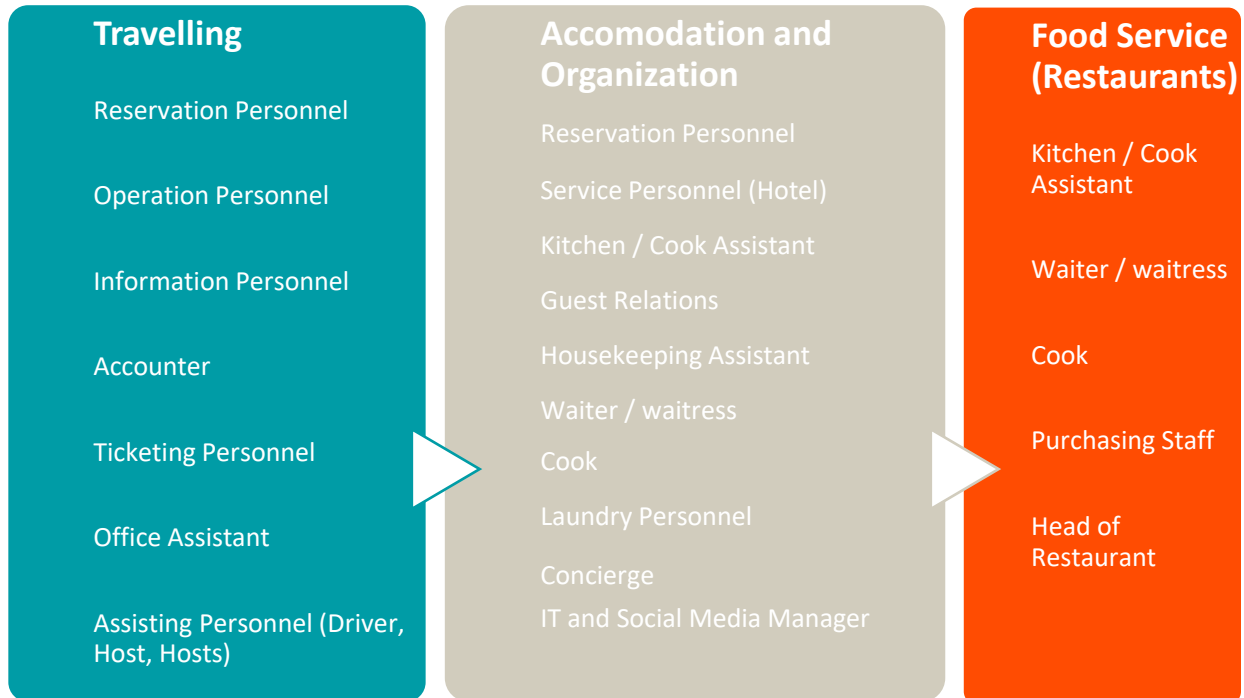
Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Ceramic Tile Installer	Installs tiles made of hard materials such as granite, ceramic, glass or marble.	Tile instalment skills	Creativity; Attention to detail, Working with others; Active Listening skills; time management	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	80-100 TL (daily wage)	Indoor
Floor Covering Installer	Installs carpeting, hardwood floors, trims and bases to floors or other surfaces; inspects, measures and prepares surfaces to be covered	Floor covering skills	Attention to detail; Patience; cooperation skills; Active Listening skills; time management;	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	80-100 TL (daily wage)	Indoor
Plasterer	Applies plaster, render plasterboard to interior, mixes different types of plaster.	Plasterer skills	Attention to detail; Active Listening skills; time management; safety-minded	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	80-100 TL (daily wage)	Indoor
Roofer	Installs shingles, asphalt, metal, or other materials to make the roof watertight	Roof installation skills	Attention to detail; Active Listening skills; time management; safety-minded	Basic Turkish	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)	Elementary School	80-100 TL (daily wage)	Indoor/O outdoor

4.1.3. Hospitality Sector: Travelling, Accommodation and Food Services (Restaurant)

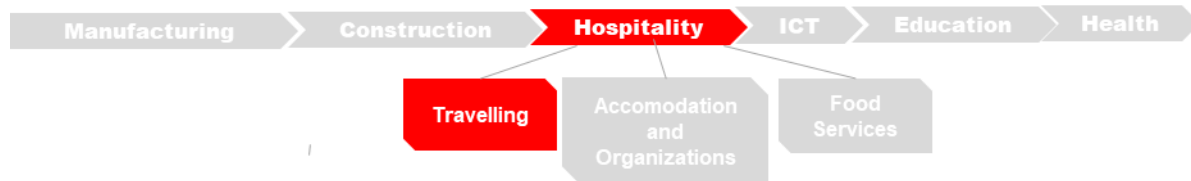


The Hospitality sector is another sector with availabilities at various sub-levels such as Restaurants, Accommodation and Event and Organization Planning. The main areas of the sector are summarized below under the subtitles of **Travelling, Accommodation and Organization** (including event planning) as well as **Food Service** (see Graph 6).

Graph 6. Value Chain Analysis for Hospitality Sector



Travelling



The Travelling (tourism) sector is very open to international and domestic political developments, and Turkey's geographic position as a critical actor in its region also plays a strategic role in the flow of tourists. Turkey has overcome a fluctuating period between 2015-2017, yet since the year of 2018 the number of tourists in Turkey have increased remarkably. During these years, tourists coming from MENA region have compensated the decrease of tourists coming from European countries and mainly Russia. The number of tourists who came Turkey in 2019 July increases by 16,7% in comparison to 2018 July.

Istanbul is widely known as one of the most popular cities in Turkey, and serves as a focal point for events and organizations as well as transitions to other near cities. Istanbul's peripheries like Catalca are also aimed to be opened to tourism in the near future.

One of our interviewees have stated that the very critical GALATAPORT project in Istanbul, which is expected to be opened by 2020, will contribute to Istanbul's tourism potential. The number of tourists to be carried by cruisers is expected to be more than 2,000,000 per year and it is aimed to reach tourists who have wide travelling experience. Taking into consideration all these positive expectations for the sector, qualified and experienced personnel equipped with social and technical skills is the main need, as one of our interviewees have stated.

As expressed by one of the interviewees, the tourism sector includes various components and increasing number of tourists is directly reflected in the number of required staff in many different segments of economy. Arabic speaking staff are now in high demand in all the parts of the sector including travel agencies, hotels and salespersons in souvenir shops. Moreover, C1 visa procedures, which apply only to citizens of Iraq, Algeria, Afghanistan and Libya, also fuel demand for Arabic speaking personnel employed in TURSAB licensed travel agencies. C1 visa is a permit that is good for a single visit and valid for 60 days after receipt. There is no charge to citizens of Iraq, Algeria, Afghanistan and Libya for this visa application (extra costs due to intermediaries handling visa applications may arise in different countries). C1 visa covers visits made for business, tourism or medical purposes, and only applies to entries through airports, excluding land route entries.


Table 36. Number of Tourists in Istanbul Between 2014-2018

	2014	2015	2016	2017	2018
Number of Tourists in Istanbul	11,842,983	12,414,677	9,203,987	10,840,595	13,433,101
Number of Tourists from Arab countries in Istanbul	2,126,641	2,534,324	1,976,166	2,633,495	3,408,424
Percentage of Tourists from Arab countries (%)	18	20.4	21.5	24.3	25.4

Table 37. Year-To-Date Comparison: Number of Tourists from Arab countries in Istanbul Between 2017-2019 (January-July)⁵³

January-July	2017	2018	2019	Change Between 2018-2019 (%)
ALGERIA	102,194	138,048	152,180	10
BAHRAIN	32,946	38,282	41,212	8
EGYPT	51,926	73,183	92,171	26
IRAQ	262,777	298,449	369,644	24
JORDAN	91,372	142,436	176,168	24
KUWAIT	138,371	159,949	200,741	26
LEBANON	78,293	115,608	147,029	27
LIBYA	46,332	90,492	135,073	49
MOROCCO	49,403	80,705	110,905	37
OMMAN	12,388	28,632	50,137	75
QATAR	24,432	49,085	57,422	17
SAUDI ARABIA	299,798	375,703	289,906	-23
SUDAN	5,880	8,372	8,981	7
SYRIA	53,686	75,676	104,325	38
TUNISIA	57,638	74,324	91,297	23
U.A.E.	24,485	21,855	19,527	-11
YEMEN	14,329	21,115	22,154	5
OTHER	11,275	22,315	31,848	43
TOTAL	1,357,525	1,814,229	2,100,720	16

⁵³ <https://istanbul.ktb.gov.tr/Eklenti/64566,temmuz-2019pdf.pdf?0>, p.10



Travel agencies are divided in their functions according to their expertise. While some of the agencies primarily work for incoming tours (from other countries to Turkey), the other agencies work for outgoing or domestic tours with mainly Turkish travellers.

One of our interviewees stated that travel agencies that primarily organize incoming tours are a better alternative for Syrian young women and men. These agencies are mostly located in districts at the European side of Istanbul such as Sultanahmet, Fatih, Beyazıt, Beyoglu and Karakoy.

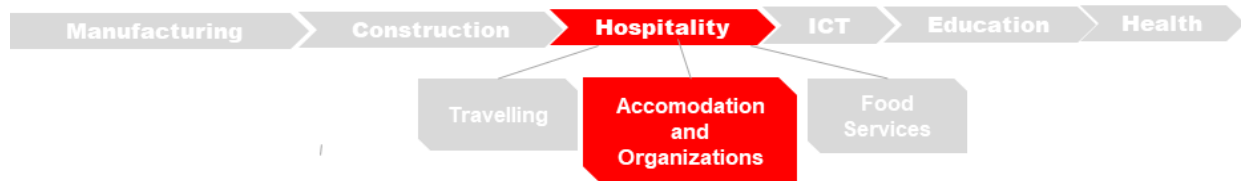
One interviewee from an outgoing agency who also organizes domestic regional tours in Turkey stated that because of economic crises in Turkey, the number of Turkish customers is in decline, and foreign customers may replace declining number of Turkish customers for domestic regional tours. Therefore, it may be a chance for Syrian young women and men to work for outgoing agencies as well. In this case Turkish language and ability to find / organize Arab tourists through e.g. social media campaigns becomes the main skills for the potential workers. Part-time working options exist for tour organizations and guides, yet particularly occupations for tour organizations require reachability at any time of day. Several weeks of a course for general concepts and Amadeus computer program is advised by our interviewees.

Table 38. Job Opportunities at Travel Agencies

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Reservation Personnel	Responsible for administration of reservations through internet, and phone callings.	Computer knowledge	Excellent Written and verbal communication skills; Multi-tasking; Time-management Ability to effectively prioritize tasks; Understanding and patient with customers	Intermediate Turkish, Intermediate English	Male or Female	High School / University	2,020.90 TL	Indoor
Operation Personnel	Responsible for planning and actualization of arriving, departure and transfers of tourists.	Computer knowledge	Attention to detail and accurate; multi-tasking; time management; Courteous	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor
Information Personnel	Information official(s) should be recruited in all of the travel agencies according to Travel Agencies Law No.1618.	Computer knowledge	Attention to detail; accuracy; interpreting data; awareness on social trends and demographics	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor

Accountant	Responsible for all the accounting operations related to personnel, hotel/ tour operations.	Accounting knowledge, Computer knowledge	Attention to detail; accuracy; general business acumen and interest; integrity; higher-order thinking (ability to account for long-term effects of financial decisions)	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor
Ticketing Personnel	Responsible for recording all the flying operations.	Computer knowledge (Amadeus programming), Turkish and Arabic/English	Attention to detail and accurate; multi-tasking; time management; Courteous.	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor
Office assistant	Assist operations and reservation departments.	Computer knowledge	Excellent Written and verbal communication skills; Multi-tasking; Time-management Ability to effectively prioritize tasks; Understanding and patient with customers	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor
Assisting Personnel (Driver, Host)	They work for providing services in out of office transfers	Basic computer knowledge.	Good personnel relations, flexibility, problem solving, analytical thinking	Intermediate Turkish, Intermediate English	Male or Female	High School/ University	2,020.90 TL	Indoor

Accommodation and Organizations



As mentioned in the previous section, with the expansion of tourism in Istanbul, the demand for accommodation and organization services is also rising. This leads to increase in demand for reservation, service and office related positions.

There is a continuous increase in the number of tourists coming from Arabic speaking countries and this has directly increased the demand on the Accommodation and Organization sector as well. The main point repeated by our key informant interviewees is that – no matter which nationalities the tourists belong to – it is better to have balanced distribution of guests. While during the FGDs both Syrian young males and females have argued that some works such as hotel housekeeping and cleaning are perceived as unfavourable as not seen decent, accommodation and organizations sector promise wide range of opportunities regardless of gender.

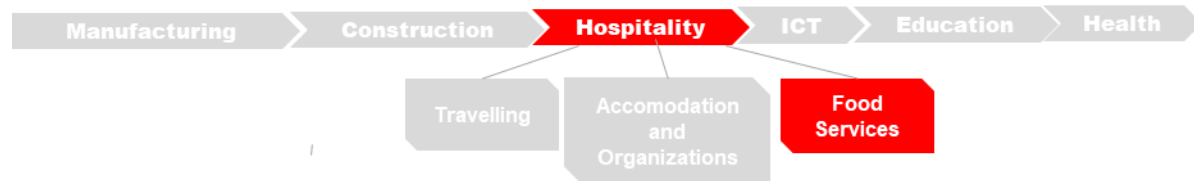
The Organization sector – including event planning – also present an opportunity to employ youth as this sector requires many errands to run and Syrian young women and men with very basic Turkish can have an employment opportunity. Because the sector needs both full and part time staff, it can be suitable for Syrian young women and men who are studying at the same time. This is a sector with high staff turnover rates, and the sector mainly expects qualifications listed in Table 37 below.

Table 39. Job Opportunities at Hotels

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Reservation Personnel	Responsible for administration of reservations through internet, and phone callings.	Computer knowledge	Hardworking patient	Intermediate Turkish, Intermediate English	Male or Female	High School / University	2,020.90 TL	Indoor
Service Personnel (Hotel)	Serves food and drinks at hotel.	Hygiene, Service Skills	Presentation, Problem Solving, Attention to Detail	Turkish, Arabic	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel)
Kitchen / Cook Assistant	Helps with the preparation of food.	Hygiene	Presentation, Problem Solving	Basic Turkish	Male or Female	High School	2,020.90 TL+ food	Indoor (kitchen)
Guest Relations	Ensures and provides flawless, upscale, professional and high-class guest service experiences, responds to guests needs and anticipates their unstated ones	ICT skills	Outgoing, Presentable, Communicative, Problem Solving	Turkish, Arabic, English	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel)
Housekeeping Assistant	Responds guests' housekeeping requirements.	Not necessary as needed skills are taught OJT.	Physical endurance, Communication, Problem Solving, Trustworthy, Team work, Attention to Detail	Turkish, Arabic	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel)
Waiter / waitress	Serves food at places such as hotel, café and restaurant, helps with the tables.	Service Skills	Presentation, Problem Solving, Energetic, Presentable	Turkish, Arabic	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel, restaurant)

Cook	Sets up workstations with all needed ingredients and cooking equipment prepares ingredients to use in cooking (chopping and peeling vegetables, cutting meat etc.), cooks food in various utensils or grillers.	Cooking skills, Hygiene	Attention to Detail, Creativity, Stress Management , Multitasking, Team Play	Turkish	Male or Female	High School	2,020.90 TL+ food	Indoor (kitchen)
Laundry Personnel	Helps with the laundry of guests and hotel.	Not necessary as needed skills are taught OJT.	Physical endurance	Basic Turkish	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel)
Bell Team Personnel	Helps with the carrying of guest luggage, welcomes guests inside the hotel, guides guests to their room.	Not necessary as needed skills are taught OJT.	Physical endurance, Communication, Presentation	Turkish, Arabic	Male or Female	High School	2,020.90 TL+ food	Indoor (hotel)
Office Assistant (Organization company)	Deals with simple or menial tasks and errands at organization company.	Basic skills related to office work, ICT skills, Organizational skills	Quick, Team Work, Positive Attitude	Turkish	Male or Female	High School	2,020.90 TL+ food	Indoor / Outdoor
IT and Social Media Manager	Develops and implements marketing strategies for a multi-branch restaurant websites and social media sites.	IT and Social Media Skills	Organizational Skills, Problem Solving, Motivation, Creativity	Turkish	Male or Female	High School	2,020.90 TL+ food	Indoor

Food Services (Restaurants)



Besides traveling agencies and accommodation, the Food Service sector has demonstrated successful growth particularly in the areas with intensive Syrian population. While increasing raw material costs and number of restaurants create a competitive environment in the sector, particularly the idea of serving traditional Syrian foods has opened a door for potential Syrian workforce.

Turkish skills may pose as a problem to be employed as a waiter in the sector yet there are some positions like kitchen assistant and delivery driver which require minimal language skills. Another issue is high turnover rates, which increases the likelihood for employment opportunities. Reasons of it are defined as the following:

- Complaints of salary and / or benefits
- Intensive working hours
- Unrealistic expectations about work
- Personal reasons (family, illness, school, etc.)
- Technically unqualified
- Lack of soft skills

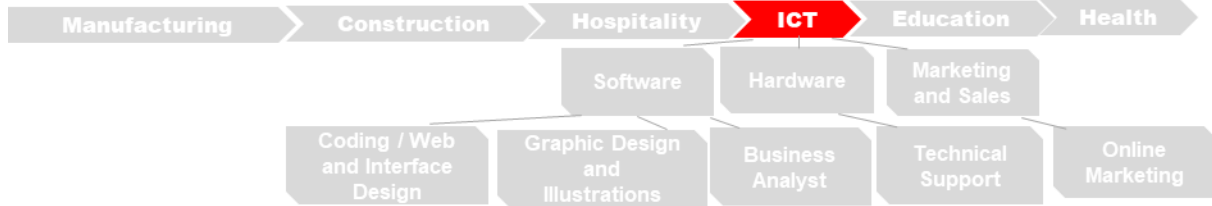
From a gender equality perspective, it was stated during the KIIs that females are not preferred as employees in the Syrian restaurants for cultural reasons. An entrepreneur interviewee stated that working in the closed areas such as kitchen with males and serving foods to customers are not perceived as “respected jobs” for females from his perspective. He stated that females are working from houses through preparing time-consuming foods and they are paid for each unit of food. Almost all of the females in the FGDs also stated that working at a restaurant or café as a waiter and serving foods for customers is seen reputable in their society as much as working in an office environment. An interviewee who manages a chain of Syrian restaurants indicated that there is no Syrian restaurant among any members of Turkey’s restaurant associations yet.

Language barrier is an obstacle in the recruitment of Syrian young women and men by Turkish restaurants. That is why Turkish restaurant chains are more interested in recruiting Turkish or alternatively men and women coming from Turkic republics. They think Syrians can be made part of this sector in the coming years, through a Syrian generation who has Turkish proficiency. Therefore, having proficiency in Turkish becomes more important in the service sector, particularly for being waiter.

Table 40. Restaurant Sector Job Opportunities

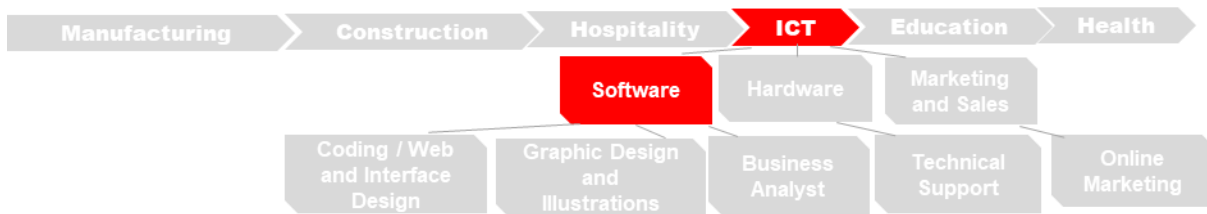
Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Aspect	Gender	Minimum Education	Average Salary	Work Environment
Kitchen / Cook Assistant	Helps with the preparation of food.	Hygiene, cooking skills	Presentation , Problem Solving	Basic Turkish, Arabic	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)		Elementary School	2,020.90 TL	Indoor (kitchen)
Waiter / waitress	Serves food at places such as hotel, café and restaurant, helps with the tables.	Service Skills	Presentation , Problem Solving, Energetic, Presentable	Pre IntremediateTurkish , Arabic	Male		Elementary School	2,020.90 TL	Indoor (restaurant)
Cook	Sets up workstations with all needed ingredients and cooking equipment	Cooking skills, Hygiene	Attention to Detail, Creativity, Stress Management, Multitasking, Team Play	Basic Turkish	Male		Elementary School	3,000 TL	Indoor (kitchen)
	prepares ingredients to use in cooking (chopping and peeling vegetables, cutting meat etc.),				Male				
	cooks food in various utensils or grillers.				Male				
Purchasing Staff	Supplies products needed by the restaurant or cafe.	Money handling, Basic calculation, El-Emir accounting programming	Energetic, Punctuality, Trustworthy	Upper Intermediate Turkish	Male		Middle / High School	2,020.90 TL	Indoor / Outdoor
Head of Restaurant	Administer all the staff and coordinate the restaurant activities.	Computer knowledge, managerial personal abilities.	Energetic, Punctuality, Trustworthy	Upper Intermediate Turkish	Male		Middle / High School	3500-4000 TL	Indoor (restaurant)

4.1.4. Information and Communication Technology (ICT)



The consensus among the key informants was that Software, Hardware and Digital Marketing fields all present important opportunities. The breakdown of suitable occupational groups and occupations outlined over the KIIs was as follows;

Graph 7. ICT Sector Value Chain Analysis



Software occupations are those that involve developing programs for clients or users. These programs may work online or offline, but they all serve to carry out a particular function or set of functions for the users.

There are various health risks associated for ICT occupations, including those associated with software, that usually involve working in front of a computer for long hours and sometimes under prolonged periods of stress. These risks include increased blood pressure, high blood sugar, excess body fat around the waist and abnormal cholesterol levels. Also, dry eyes, deterioration in eye-sight and headaches along with back-and neck-pain are said to be common among professionals in this sector.

The working environment is generally safe regardless of gender. Key informants have emphasized that they never witnessed any widespread incidents of harassment in this sector. Working hours can be long and frequently include weekends at least to a degree. Working at home is possible depending on the company culture and rules.

Getting work permits is the main issue expressed by the key informants as a hardship faced by Syrian employees. This is partially because of the employment quotas on those with temporary protection status.

Intermediate level of English is thought to be sufficient for all other occupations except technical support, which requires only beginner's level knowledge of English or none, depending on the type of hardware to be specialized on. Technical support experts, who will specialize on providing mechanical or electronic repairs, can get on without any knowledge of English. For those who will provide service support for software programs or be responsible for configuring software on various devices, at least a level of English knowledge sufficient to understand the business jargon in the sector is necessary (while speaking or writing skills need not be at this level). Key informants thought Syrian experts would mainly serve Arabic-speakers in Turkey or other countries. Knowledge of Turkish in that sense was not taken as a must or as emphasized as English, although knowledge of Turkish would undoubtedly be welcome as it would enable Syrian specialists to link with Turkish clients as well.

Below is a list of required trainings and soft skills for different occupations under the ICT sector. University degree is not said to be mandatory for any of these occupations. Strong command of English is advised as mandatory for coding.

Table 41. ICT Sector Job Opportunities

Position	Technical / Soft Skills	Required Technical Trainings (At least one on each row is required; more than one is preferable)	Existing Gender Aspect
Coder	Communication skills; Time management; Adaptability; Overall appetite for learning and trying new technical skills; Intermediate English, Intermediate Turkish	Java, C++, Swift	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)
Web Designer and Interface Designer	Communication skills; Time management; Customer Service; Adaptability; Overall appetite for learning and trying new technical skills, Intermediate English, Intermediate Turkish	PHP; Python; HTML; XML; JavaScript; ASP.Net; SSL; CSS	Male / Female
Graphic Designers and Illustrators	Communication skills; Time management, Intermediate English, Intermediate Turkish	Autodesk; Adobe Photoshop; Adobe Illustrator; Adobe InDesign; Canva; Adobe Aftereffects; Drawing Skills; Typography	Male / Female
Business Analyst	Customer Relations and Sales; Problem-Solving Skills, Intermediate English, Intermediate Turkish	CRM programs; SQL; Oracle Big Data; Sector-specific information for understanding the clients' business	Male / Female
Technical Support Expert	Communication skills; Customer Relations and Sales; Problem-Solving Skills, Intermediate English, Intermediate Turkish	COMPTIA; Cizgi-Tagem.org; Jira software available at https://www.atlassian.com/	Male (Key informants estimate that there are significantly more males than females who are involved with this occupation)
Online Marketing Expert	Multitasking; Communication skills (including developing a sense of Social Norms and what/how not to post on social media), Intermediate English, Intermediate Turkish	Advertising on various social media platforms- YouTube, Facebook, Instagram, Twitter; SEM; SEO; Emailing; Pay-per-click advertising, Google trends; Google keyword planner (Google Ads)	Male / Female



Coding, Web Design and Interface Design: Coders are individuals with strong command of one or more of the programming languages available in the market. They use this knowledge to write a set of rules in a programming language so that computers can follow these rules to fulfil a particular function. Coding is among the recommended sectors because it is expected by the interview participants that the demand for coders among small- and large-sized enterprises is set to increase (both as employees and independent service providers). Web Design and Interface Design consist of designing easy-to-use, attractive, and intuitive interfaces that laypeople can operate without any professional skills. As for coding, interview participants predicted that demand for web and interface design services will go up in the near future.

However, it was also frequently mentioned during the interviews that it is already relatively easy to hire coders or designers to work with and availability of coders or designers is not a significant issue.

The real issue that is expected to drive up the demand for coders and designers is thought to be that successful and effectual coders and designers are rare in the Turkish market. The overall impression among the key informants was that market needs more individuals who would take the time to provide tailor-made solutions for their clients rather than simply adding minor tweaks to readily available pre-written program codes or design templates (the problem is not that pre-written templates are used but that these usually are not altered sufficiently to meet specific client needs in question).

It was asserted that the problem partially has to do with lack of sufficiently developed coding knowledge among many coders available in the Turkish market. This is one of the reasons why Turkish coders frequently rely on ready-to-use coding templates and try to get by with making only minor tweaks which usually fall short of fulfilling client needs to a satisfactory degree.

While it was frequently mentioned that under current conditions ratio of women to men in this occupation is quite low, key informants expressed no specific reason why this sector would be less suitable for women than it is for men other than personal tastes and interests prevalent between two genders. If other things such as knowledge of English and access to education are held equal, then the potential presented by this occupation would not change based on gender. However, underlying cultural factors that reduce women's access to language or technical education should be taken into account and addressed, as they otherwise would also reduce their access to the coding occupation.



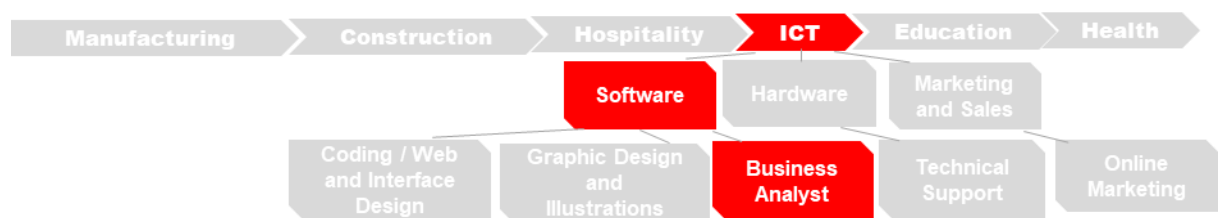
Graphic Designers and Illustrators: These occupations focus on creating visual images or concepts that can be used in advertisements, brochures, magazines, webpages or any other type of commercial or corporate communication. Illustrators focus on providing a visual representation of an idea or concept. 3D drawings and architectural software illustrations can fall under the responsibilities of an illustrator.

Overall consensus among the interviewees was that these types of designers could especially succeed if they target Syrian enterprises in Turkey or Arabic-speaking clients in other countries.

At least an intermediary level of English is listed as a very important asset, but advanced level is not mandatory as long as it doesn't constitute a barrier to understanding the commands and functions in design programs as well as help menus.

Women to men ratio is low overall but the expectation of the interviewees was that it was not as low as in coding. A significant level of familiarity with computer software as well as specific experience in design programs is necessary to succeed. Social norms prevalent in Syrian culture may have prevented women from gaining access to the kind of background trainings and experience these occupations require in general.

Key informants emphasized the positive effect of sector specific knowledge for designers. Graphic designers and illustrators can find work in various business sectors. It is important to understand the critical elements of quality or success in their business field. For example, a graphic designer that had worked on a hospital's web page would have gained significant experience on the key points of attention and interest that are brought up by the client when designing a hospital's webpage. This would provide them with a valuable competitive advantage when it comes to working with other hospitals.



Business Analyst: Put simply, it is an analyst's job to understand what the client wants. This may involve understanding what is required of the software in development, what functions the client needs fulfilled or how an existing software program can be utilized to get the client what they require. One of our key informant interviewees asserted that, in software or web development, role of the business analyst is

more critical than that of the coder. They can lift up the quality and reduce the duration of any code development process with their input.

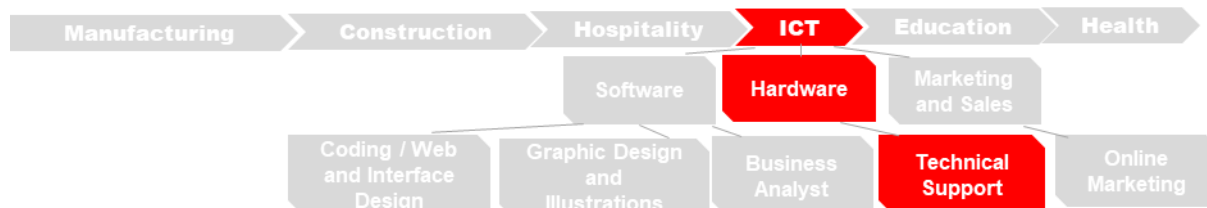
Being a good business analyst has to do with both developing the right soft-skills for effective communication as well as having a strong knowledge of coding or design software in order to advise clients appropriately. Possible trainings for this role are outlined in the next section.

Role of the business analyst and coder or designer may merge in a single person. However, it should always be remembered that business analysis is an entirely different function that is critical to the success of any software program or application development process.

Business analysts can serve as salespeople or client relations experts in software companies. They can also take part in the data mining operations of private sector companies or public sector institutions. They can support sales and marketing departments by utilizing different types of Customer Relationship Management software on the market. Business Analysts can also work at the call centres of various international software companies providing remote technical support to Arabic speakers.

Even for freelance coders, developing the skills set of a business analyst will be helpful. Speaking Turkish is quite important if a business analyst is to interact mainly with Turkish clients. However, for analysts focusing on Arabic-speaking clients, Turkish is not necessary while Arabic is quite important. At least an intermediate level of English is quite helpful but an advanced level is not a must solely for this function.

Business Analysts could also develop mobile application solutions targeting consumers or businesses or work for such developers in order to help them improve the quality of their products.



Technical Support Expert: One of the significant findings from the FGDs with male Syrian refugees was that becoming technical experts within the ICT sector, especially specializing on computers and cell phones, was one of their stronger aspirations. It is the job of a technical support expert to provide fixes for hardware malfunctions or breakdowns. The Technical support experts can start their own businesses by setting up a store or work as customer or technical service representatives at electronics stores or companies. Provided they possess the required communication skills, technical support experts could go into customer relations and help customers with purchases through their extensive knowledge of the products. Setup and configuration of network internet connections and configuring devices such as printers or security cameras and alarm systems are other functions that can be overseen by technical support experts. Such experts could work in companies providing these services.

This is overall a relatively lower paying occupation type compared to the occupations under Software, however it is easier to train for and may present quicker job opportunities.



Online Marketing Expert: These are marketers with an expertise on spreading brand awareness or increasing brand equity via online channels. Their targets may include increasing online sales (ecommerce), generating brand equity or raising awareness. Search Engine Optimization, Email marketing, search engine marketing, video marketing, influencer marketing and social media marketing all are among the various tools of online marketing. This is an area that is quite new compared to traditional media and its methods are relatively more complicated when it comes to various dimensions of marketing such as targeting, execution, impact and monitoring. Moreover, during the KIIs no existing gender aspect was brought up by the interviewees.

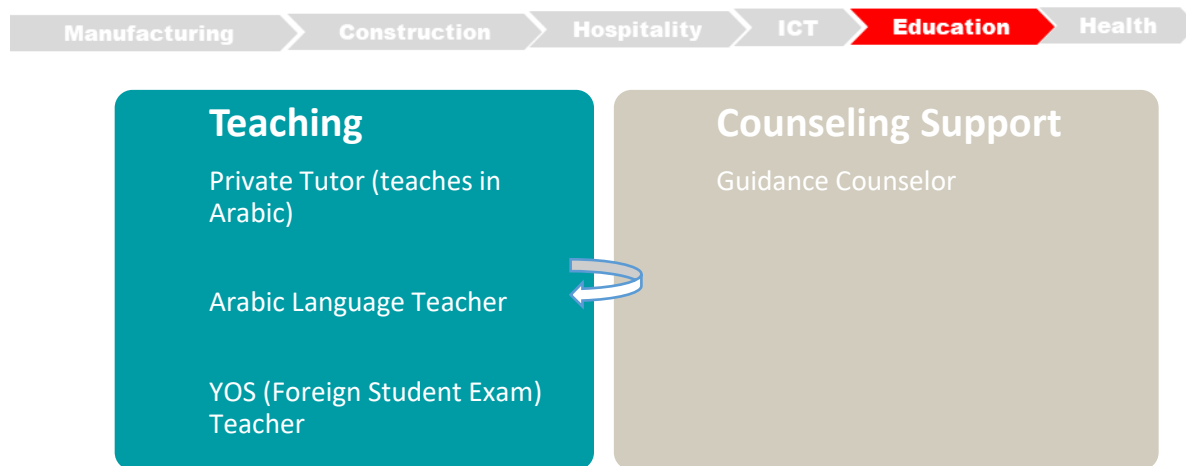
From disseminating a video on YouTube (what time of the day is the best for airing, which keywords should be used, what is the ideal video length for your purposes, how to target certain client segments, etc.) to ensuring your webpage appears close to the top of the list in a Google search, there are many different points of expertise that need to be developed in order to be a successful online marketer.

One of the outcomes of the KIIs was that demand for online marketers is likely to rise in the near future. It was also mentioned that knowledge of Arabic can be an asset for an online marketer as s/he can help Turkish brands reach Arabic-speaking customers in Turkey or neighbouring countries, thus driving up the sales of traditional stores or e-commerce sites in Turkey. At least an intermediate knowledge of English is also necessary to succeed as an online marketer. Online marketers could find work in large-scale private companies, digital advertising agencies or as outreach experts at civil society organizations focusing on Arabic-speaking communities in Turkey.

Salary Levels and Incentives for Occupations in ICT

Entry-level net pay for occupations in this sector currently is currently said to be around 3,000 TL per month. For those who are sufficiently experienced, advanced and also talented in using two or more of the technical programming languages or software types, net pay can be significantly more than this level. At least a net salary of around 6,000 TL per month is expected by such professionals.

4.1.5. Education Sector



Language Teaching: The first occupation under education sector recommended by the key informants is language teaching. While learning to teach requires specialized training the fact that Syrians speak Arabic as mother tongue endow them with an advantage in learning to teach Arabic. Those who also speak English or Turkish may in certain cases interact more effectively with students although speaking a second language is not a requisite. Arabic teaching jobs are available in language schools and various academic institutions.

Private Tutors: Another potential occupation under the education sector is private tutorship. More than 1,000,000 Syrian refugees in Turkey were under the age of 10 as of 2017⁵⁴. According to Ministry of Education data, primary school education enrolment among Syrian refugee children is at 96% while secondary school or high school enrolment rates are significantly lower in comparison, at 57% and 24% respectively⁵⁵. While there could be a number of underlying reasons for this, according to key informants interviewed, one reason for this drastic drop in enrolment from primary to secondary or higher education is that Syrian children find it hard to adapt to and succeed in the Turkish education system, especially due to language barriers, cultural differences and, in some cases, discrimination based on identity by other students. This is thought to generate a need for private tutors who can speak to Syrian students in Arabic and help them better grapple with their school requirements. This is very important as students who speak Arabic receive help from Arabic-speaking tutors in their own language before or after their classes in Turkish. Private tutors can focus on one or multiple universal disciplines such as mathematics, chemistry, physics or biology.

Counsellors: One of the reasons for the hardships Syrian Students face in adapting to the Turkish school environment, as expressed by the key informants interviewed, is that they may face hostilities or violence from students from the local community. Arabic-speaking counsellors could help mitigate the effect of

⁵⁴ Syrian Refugees in Turkey, Policy Analysis, The Washington Institute; <https://www.washingtoninstitute.org/policy-analysis/view/syrian-refugees-in-turkey>

⁵⁵Ministry of National Education https://hbogm.meb.gov.tr/meb_ivs_dosyalar/2018_10/05144550_01Ekim2018iinternetbulteni.pdf

such issues on the psycho-social wellbeing of students. A significant barrier is that in order to work as counsellors, a university degree is a must.

As roles in education frequently bring together adults with adolescents or children, it is important for a teacher to always pay attention to their interactions with students. Protecting children’s well-being from oneself or others is of high importance.

Working conditions are safe when it comes to teaching regardless of gender. Generally, there is no need to work overtime. Evening or weekend classes will have separate teachers than the teachers who work during the regular work days.

For language teachers, private institutions like “Akademi Dil” provide 3-year intensive training programs for Arabic-language teachers. Otherwise schools generally recruit university graduates from Arabic literature departments.

Turning to private tutorship, a university degree from education faculties is generally sought after by employers. For teaching primary and secondary school students, a university degree is not necessary but still strongly recommended. A strong interest in topics to be covered and strong communication skills with children are important. Individuals who only have a high school degree or currently enrolled in university could also serve as private tutors to Syrian refugee students. University students could provide private courses on Foreign Students Examination (“YOS”) to younger students. Private tutors can start working as freelance tutors while they continue their university courses at the education faculties and start gaining experience.

Table 42. Education Sector Job Opportunities

Position	Technical / Soft Skills	Required Technical Trainings (At least one on each row is required; more than one is preferable)	Existing Gender Aspect
Language Teachers	Communication skills; problem solving; social and emotional intelligence; cultural competence (ability to understand and educate across cultures and demographics)	Degree from a Language and Literature; or Translation and Interpreting Depts.	Female / Male
Counselors	Communication skills; empathy; rapport-building; flexibility	Degree from a Psychological Counseling and Guidance Dept.	Female
Private Tutors	Communication skills; problem solving; social and emotional intelligence; flexibility; time management	Degree from an Education Faculty	Female / Male

4.1.6. Health Sector

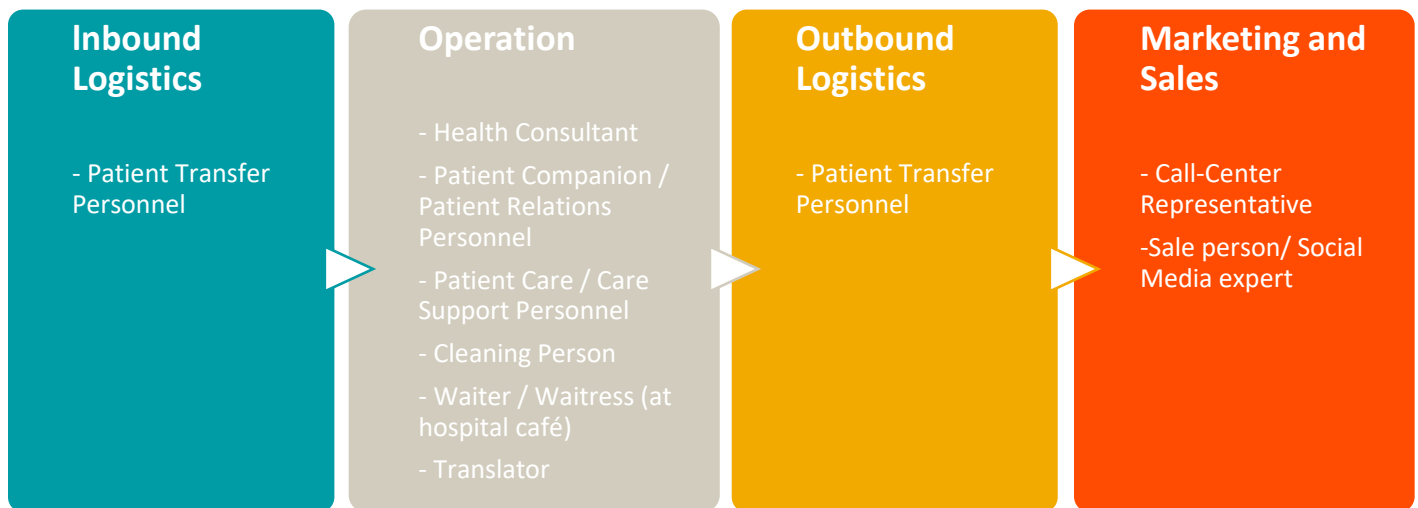


In the health sector, the increased number of Arabic speaking customers due to expanding **Health Tourism** sector has changed the needs for required personnel. While the demand for hair transplantation and other cosmetic operations are high, others such as eye/cardiac surgeries and thermal tourism, elderly/disabled tourism are also in high demand. Health tourism provides a chance of 12 months’ tourism without being affected by seasonal changes. Turkey’s geopolitical location, usage of modern technology and having qualified doctors are also highly advantageous to reach by various regions. The total number of patients is expected to reach 1,300,000 by 2020 according to estimations of Ministry of Health.⁵⁶

Travel agencies which hold (A) level travel agency license under TURSAB (Association of Turkish Travel Agencies) and International Patient Consultancy Centres serve inside or outside of hospital chains. As patients vary among different regions, Arabic, Russian and other European languages are considered to be more important then before for this sector, and translators or patient companions who know these languages are increasingly more needed by hospitals.

This sector includes components closely related components with hospitality and accommodation sector as well. Besides, social media relations, call centre and ICT sectors are also sub level beneficiaries of the increasing demand for the health sector. Below is the value chain analysis of the sector with regards to available positions and requirements of the positions.

Graph 8. Health Sector Value Chain Analysis



⁵⁶ TURSAB Health Tourism Report, available at http://www.tursab.org.tr/dosya/12186/saglikturizmiraporu_12186_5485299.pdf

Table 43. Health Sector Job Opportunities

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Health Consultant	Coordinate all the activities about finding and accommodating the patients and relations with hospitals/clinics .	Medical knowledge, being highly experienced about the process. Computer usage.	Good personnel relations, flexibility, problem solving, analytical thinking	Good command of Turkish, Arabic and English. (Other languages like Russian are also an advantage)	M/F	High school	2,020.90 TL+ commission	Indoor (hospital) , if she/he is experienced she/he can work in coordination with other members of the team in outdoor.
Sale person/ Social Media expert	Uses social media channels for finding potential customers	Good knowledge of digital advertisement	Good personnel relations, flexibility, problem solving, analytical thinking, creativity	Good command of Turkish, Arabic and English. (Other languages like Russian are also an advantage)	M/F	High School	2,020.90 TL+ commission	Indoor (hospital) , if she/he is experienced she/he can work in coordination with other members of the team in outdoor.
Patient Transfer Personnel	Transfers patients among airport, hospital and hotel.	Driving skills.	Perseverance, Communication, Accuracy, Discipline, Speediness, Politeness, Energetic, Patience, Flexibility	Turkish, Arabic, English	M/F	Elementary School	2,020.90 TL	Outdoor / Indoor (hospital)
Translator	Facilitates dialogue between hospital	Translation skills.	Communication, Problem solving, Client oriented,	Turkish, Arabic, English	M/F	Elementary School	2,020.90 TL	Indoor (hospital)

	personnel and the patient.		Cultural orientation					
Call-centre Representative	Handles inbound telephone calls by providing information to customers through International Patient Support Centre.	Data entry, Database management	Communication, Problem solving, Client oriented, Cultural orientation	Turkish, Arabic, English	M/F	High school	2,020.90 TL	Indoor (office)
Patient Care / Care Support Personnel	Helps with the needs of patient such as lifting, cleaning, etc.	Not necessary as needed skills are taught OJT.	Physical endurance, Perseverance, Communication Accuracy, Discipline, Speediness, Politeness, Energetic, Patience, Flexibility	Turkish, Arabic	M/F	Elementary School	2,020.90 TL	Indoor (hospital)
Cleaning Person	Helps with the cleaning of health facility.	Not necessary	Physical endurance, Perseverance, Patience, Flexibility	Basic Turkish	M/F	Elementary School	2,020.90 TL	Indoor (hospital)
Waiter / Waitress (at hospital café)	Serves food at the hospital café and restaurant, helps with the tables.	Waitressing skills	Physical endurance, Perseverance, Communication Accuracy, Discipline, Speediness, Politeness, Energetic, Patience, Flexibility	Basic Turkish	M/F	Elementary School	2,020.90 TL	Indoor (hospital)
Patient Companion / Patient Relations Personnel	Accompanies and guide patient at the health facility, helps with the needs of patient.	Not necessary as needed skills are taught OJT.	Communication Perseverance, Patience, Flexibility	Turkish, Arabic	M/F	Elementary School	2,020.90 TL	Indoor (hospital)

4.1.7. Multi-Sector Jobs

Besides the job opportunities mentioned above, some other job opportunities that are available in various sectors are discovered during the research as pointed out repeatedly by different FGD participants and interviewees from variety of sectors. For this gender-sensitive LMA, these opportunities are named **multi-sectoral jobs**. As they are sector-independent, they are less affected by negative developments in specific sectors. Thus, a person trained for these jobs would have a higher chance of finding a job. Some of these positions are included above with regards to their needs per sector but below are the general requirements for these occupations.

Table 44. Multi-sector Job Opportunities

Position	Description	Technical Skills	Soft Skills	Language Skills	Existing Gender Aspect	Minimum Education	Average Salary	Work Environment
Call-center Representative	Handles inbound telephone calls by providing information to customers, makes outbound calls to provide potential customers about the company's services and products.	Data entry, Database management	Communication, Problem solving, Client oriented, Cultural orientation	Turkish, or Arabic with some Turkish skills if Arabic call-centre	M/F	High school	2,020.90 TL	Indoor (office)
Survey Taker	Conducts surveys and collects data.	Data Entry, Prompting	Communication, Organization, Attention to Detail, Confidentiality, Thoroughness	Turkish, or Arabic with some Turkish skills if Arabic survey.	M/F	High school	2,020.90 TL	Indoor/ Outdoor
Accountant and administrative staff	Handles accounting operations and partially responsible for export operations.	MS Office, Accounting programmes, export operations	Communication, Problem solving, Client oriented, Cultural orientation	Intermediate Turkish, Intermediate English	M/F	High school	3,000-3,500 TL	Indoor (office)
Data Entry Person	Transfers data from paper formats into computer files or database systems,	Data entry software (Excel, SPSS, etc.) skills	Organization, Attention to Detail, Confidentiality, Thoroughness	Basic Turkish, Familiarity with Latin alphabet	M/F	High school	2,020.90 TL	Indoor (office)

	Types data provided directly from customers, creates spreadsheets with large numbers of figures without mistakes.							
Office Assistant	Deals with simple or menial tasks and errands at businesses.	Basic skills related to office work, ICT skills, Organizational skills	Quick, Team Work, Positive Attitude	Turkish	M/F	High School	2,020.90 TL	Indoor / Outdoor
Tea Personnel	Performs basic cleaning duties at a workplace and handles tea/coffee requests.		Politeness, Communication, Perseverance	Basic Turkish	M/F	Elementary School	2,020.90 TL	Indoor (office)
Driver	Provides secure and timely driving services to transport passengers and/or goods.	Driving Skills	Politeness, Punctuality, Discipline	Basic Turkish	M/F	Elementary School	2,020.90 TL	Indoor/ Outdoor
Web Designer	Designs websites and other online products as per the needs of customers.	IT and Web designing skills	Creativity, Attention to Detail, Judgment, Client Orientation	Turkish, Arabic (depending on client)	M/F	High School	2,020.90 TL	Indoor (office, home)
Social Media Expert	Develops and implements marketing strategies for business websites and social media sites.	IT and Social Media Skills	Organizational Skills, Problem Solving, Analytical thinking, Motivation, Creativity	Turkish, Arabic (depending on client)	M/F	High School	2,020.90 TL	Indoor (office, home)

4.2. EMPLOYMENT AND WORK PERMIT OF SYRIANS

Access to labour market has been one of the main problems encountered by Syrians since the beginning of their arrival to Turkey in 2011. In the recent 7 years, the Republic of Turkey has made various reforms in order to solve this problem. In January 2016, the Regulation on Work Permits of Foreigners under Temporary Protection was issued, and Implementation Guide regarding Work Permits of Foreigners under Temporary Protection was established by the Ministry of Labour and Social Security.

This regulation and guide set out the working conditions, applications for work permits and application procedures of Syrian refugees under Temporary Protection. Although the regulation does not directly entitle the refugees to work, it eliminates the legal barriers for refugees living in Turkey under Temporary Protection to access the labour market. In 2017, 20,970 Syrians received work permits.⁵⁷

According to the Regulation on Work Permits for Foreigners under Temporary Protection, any foreigners under Temporary Protection may apply to obtain a work permit 6 months after the registration date of the Temporary Protection. The application for work permit is made through "e-Government" by the employers to employ foreigners applied for international protection, foreigners with conditional refugee status and foreigners under temporary protection.

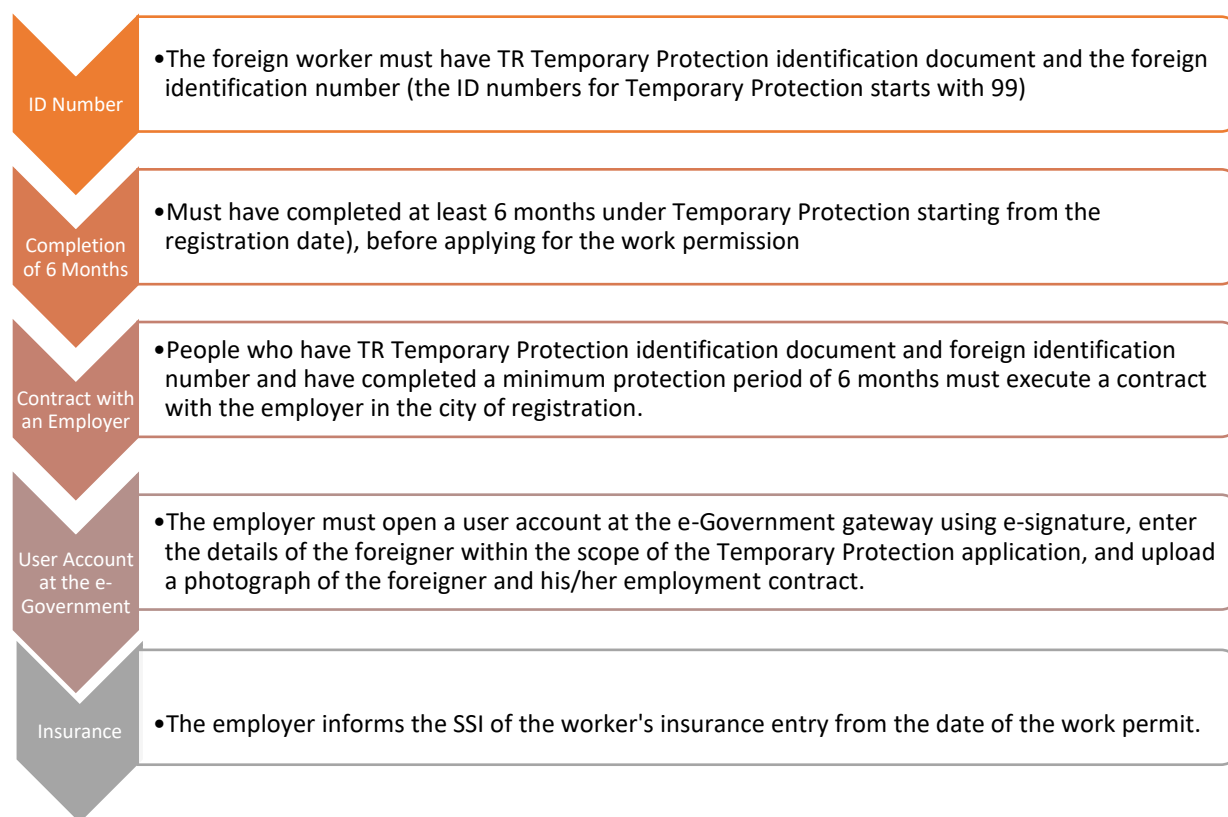
According to the regulation, the Ministry of Labour and Social Security (with the new arrangement, the Ministry of Family, Labour and Social Services) may impose province and quota restrictions on foreigners under Temporary Protection to work in seasonal agriculture and livestock. In order to apply for permission to the Ministry of Family, Labour and Social Services, health care professionals should obtain prior permit from the Ministry of Health, and education professionals must obtain prior permit from the Ministry of National Education and the Council of Higher Education. It is stipulated that the applications without prior permit will be removed from the procedure without being considered.

The work permission procedure requires that the number of foreigners under temporary protection in a workplace should not exceed 20% of the number of Turkish citizens working at the same workplace. An exception to this rule is applicable if the Turkish employer proves that searching period to find a Turkish citizen worker to fill the position exceeds 4 weeks. In that case, the employment quota may not be imposed by the Provincial Directorate of Turkish Employment Agency of the city where the workplace is registered. Another important point in the regulation is that foreigners under Temporary Protection can not be paid less than the minimum wage.

For foreigners under temporary protection, an application for Work Permit must be made by following these steps:

⁵⁷ Veriye Refugee Association website. <<https://multeciler.org.tr/turkiyede-calisma-izni-verilen-suriyeli-sayisi/>>. 2018, October 15).

Table 45. Work Permit Steps for Foreigners under Temporary Protection



Source: Ministry of Family, Labour and Social Services

In the exemption procedure of people who will work in seasonal agricultural and livestock, a foreign or employing company must apply to the Provincial Directorate of Turkish Employment Agency in the city where the foreigner is registered. The Provincial Directorate of Turkish Employment Agency enters the registration of the foreigner. If the application is found appropriate, the exemption form is given to the person who will work.⁵⁸

The Turkish Government provides employment and career consultation support to the employment process of Syrians through Turkish Employment Agency, apart from legal regulations. It is required to go to Turkish Employment Agency Service Centre to register with the Agency and to add the personal background to the Agency database, in order to be employed through the Turkish Employment Agency.

After this stage, the Turkish Employment Agency services can be accessed both directly from the Service Centres and through the Agency website.⁵⁹ After registration, the professional counsellor assigned to the registrant provides guidance in job search, job placement, profession selection, profession changing and job experience gaining processes. Besides, a current 30-months project started by Turkish Employment Agency with the cooperation of Ministry of Family, Labour and Social Services and World Bank, aims to

⁵⁸ Step-by-Step Application for Work Permit for Foreigners under Temporary Protection.

⁵⁹ Turkish Employment Agency, *Guide to Employment in Turkey for International Protection Application and Status Holders and Persons under Temporary Protection*, pp. 8-12

empower Syrians under temporary protection and members of host community through the Work and Vocational Consultancy Services, and courses and programs such as Turkish Language, Skills Development Program, Applied Educational Program, Labour Market Adjustment Program. It should be noted that the training language is Turkish.⁶⁰

5. ENTREPRENEURSHIP PATHWAY (Phase 2)

5.1. OVERVIEW

Over the course of eight years, Syrians in Turkey established more than 10,000 companies where an average of 7 people is employed and of whom 60% are Syrians. With an average Syrian household size of 6 people, findings, although not with certainty, indicate that approximately 250,000 Syrians are benefiting from the advantages of employment by these companies.⁶¹

A study⁶² of the Economic Policy Research Foundation of Turkey (TEPAV) together with the European Bank for Reconstruction and Development (EBRD) was carried-out to analyse and evaluate the size and performance of refugee partnered enterprises in Turkey alongside with the local population's perception of these firms in the environment in which they operate, and to assess the impact of the refugee influx on non-refugee driven SMEs (small and medium size enterprises). The study was based on a survey with a sample of 416 companies, 207 Turkish and 209 refugee-driven, in 8 provinces where the refugee population is denser, namely; Gaziantep, Mersin, Hatay, Şanlıurfa, Kilis, Adana, Kahramanmaraş, and Mardin. According to this study, 75% state that they had a company before coming to Turkey and almost 11% of them had already established a company in another country, mostly in Egypt, Saudi Arabia and UAE, before coming to Turkey. 24% are first-time entrepreneurs with actual refugee start-ups, most of them employing less than 10 people (84%), while the rest (16%) employing between 10 to 49 people. Interestingly, when compared with Turkish companies, educational attainment of employees, and managers in Syrian companies surveyed are predominantly university graduates. The results of the analysis show that the overall educational attainment plays in favour of workers in the Syrian companies. Diving into details pertaining to higher education, 57.4% of employees and managers in Syrian companies stated that they hold a university degree, compared to 46.3% for their Turkish counterparts.

Despite Syrian entrepreneurs' positive impact on the economy, there are, however, serious obstacles they face while running their enterprises. The top three obstacles for Syrian companies are access to finance (41.5%), tax rates (22.9%), and business laws (27%). To put it into context, 28% of Syrian employers state that they face problems with opening a commercial bank account, while the same issue poses a problem to merely 10% of Turkish employers. Similarly, many Syrian respondents assert that they have problems with domestic money transfers, followed by problems in opening individual bank accounts and with obtaining a letter of credit for transactions, respectively.

⁶⁰ The Conference is Held for Employment Support Project for Syrians Under Temporary Protection and Turkish Citizens. <https://www.iskur.gov.tr/haberler/ gecici-koruma-altindaki-suriyeliler-ve-turk-vatandaslari-icin-istihdam-destegi-projesi-acilis-toplantisi-ankara-da-yapildi/> (2019, October 22)

⁶¹https://www.tepav.org.tr/upload/mce/2019/haberler/tepav_and_ebrd_syrian_entrepreneurship_and_refugee_startups_in_turkey_lever....pdf

⁶² Ibid.

According to another study,⁶³ conducted by Building Markets in 2017 in Istanbul and Gaziantep through surveys and informal consultations with 230 Syrian owned companies, FGDs with 18 entrepreneurs, interviews with 28 SMEs Syrians concluded that Syrian entrepreneurship creates formal jobs: they employ 9.4 people on average and most of their employees were previously working in the informal sector. The benefits Syrian entrepreneurs are generating are also critical for local communities affected by the refugee influx, which tend to suffer from long-standing economic problems such as unemployment. A better understanding of these entrepreneurs and their success factors will allow for targeted support and investment that will not only create value for refugees and their host countries, but will also play a critical role in preparing Syrians for the reconstruction and development of Syria.

The study by Building Markets also focused on female entrepreneurship. Before the war, Syrian women's entrepreneurship, as well as labour market participation, was limited with men typically providing for their families as the traditional heads of household. As Syrian communities were displaced by the war, and in many cases, separated from their family members, a growing number of families had to be supported by women. To better understand the views and needs of women entrepreneurs, a roundtable discussion of 18 Syrian women entrepreneurs was conducted in Gaziantep.

The roundtable discussion which was held during Building Markets' study revealed that Syrian women entrepreneurs have started businesses such as sweet shops and bakeries, shops selling cosmetics and accessories, hairdressing salons, and language training centres. Among the new ideas expressed at the roundtable were Turkish language centres for Syrian mothers, as well as a nursery for their children, a school for children with special needs, an Internet media platform, and a marketing consulting company. Additional information from the roundtable discussion revealed that Syrian women generally work from home but have greater Turkish language abilities than men and more Turkish clients than Syrian. They are highly interested in training and qualification programs to build their capacities as entrepreneurs and expressed a need for mentorship in starting and running a business. They also identified a lack of financial support in the form of grants or loans as a constraint to establishing and growing a business.

There are several studies conducted by INGEV already on Syrian entrepreneurship including "Strengthening Refugee Entrepreneurship in Turkey" for UNHCR in 2018 and "Supporting Business Mentors for Cohesion" for BPRM, led by Building Markets and co-partnered with Habitat in 2018-2019. Findings of the both studies are not yet open to other institutions, however it would be fair to say that the aim of the both studies / programs was to enhance Syrian entrepreneurship in order to contribute to the employment and integration of refugees. The first project included KIIs with Syrian Entrepreneurs / companies in 7 cities; legal counselling service for 4 months; a brochure on administrative, financial and legal regulations and laws for start-ups; workshops and network meetings in 4 cities. The second project was important for the improvement of socioeconomic cohesion and resilience among refugee and host communities through supporting entrepreneurs and SMEs at seed, start-up and growth stages for 1 year.

An Entrepreneurship Support Centre is established by INGEV to provide legal, financial, ICT and marketing, sales and business development consultancy to entrepreneurs and SMEs. Trainings on Basic Business Turkish and Turkish Culture, Communication, Social Media for Business, Leadership and Team Building

⁶³https://buildingmarkets.org/sites/default/files/pdm_reports/another_side_to_the_story_a_market_assessment_of_syrian_smes_in_turkey.pdf

and Presentation Skills are given. Financial support to 150 start-ups for registration costs and 6 months of accounting services were provided free-of-charge.

Based on these recent studies, and also considering findings from this Gender Sensitive Labour Market Analysis, the following recommendations for Public and private institutions, business associations, national and international NGOs to encourage entrepreneurship in general and female entrepreneurship in special may be considered;

- Increased involvement by local bodies must be encouraged as the findings assert that Syrians prefer to establish their businesses in certain provinces more than in others. Therefore, increased guidance by local chambers and municipalities should be encouraged since local agencies are at the forefront of all actors guiding the integration process of Syrians.
- By making Syrian women entrepreneurs more aware of the resources available in Turkey and by supporting the providers in expanding their training, mentorship, and investment programs to Syrian women as well, it is possible to create a greater number of successful Syrian-women owned businesses in Turkey.
- Carrying-out awareness-raising activities on services offered by banks and other relevant institutions important to stimulate successful entrepreneurships.
- Promoting integration of Syrian businesses in the Turkish economy by reducing language barriers and encouraging dialogue, mentorship and partnership, is also critical to promote social cohesion and ensure conflict-sensitive programming.
- Business training that is aligned with Syrian SMEs growth constraints should be developed and offered in Arabic and Turkish.
- The strengthening of relationships between Syrian SMEs and Turkish counterparts, business and sectoral associations as well as suppliers and buyers should be facilitated, e.g. through periodically planned networking activities.

5.1.1. Necessary Procedures to be Followed by Foreigners to Set Up Businesses in Turkey

Procedures for registering a sole proprietorship or company owned by international protection and application holders, or Temporary Protection beneficiaries involve the use of the foreign identification number starting with 99 written on the foreigner's Temporary Protection Identification Document or Residence Permit Certificate.⁶⁴

⁶⁴ For numbers starting with 98 <http://www.goc.gov.tr/gecicikoruma/Pages/YabanciKimlikSorgulama.aspx> identification numbers starting with 99 can be queried.

Registration procedures may be carried out by the foreigner in person or a Turkish citizen or a financial advisor appointed as a proxy. Incorporation procedures include the following steps:

- The articles of incorporation must be sent to MERSIS (Central Registration System) online (only required for limited liability companies and corporations).⁶⁵
- An application has to be made to the Trade Chamber of the city the company is to be established in. Necessary application documents can be retrieved from the website of the relevant trade chamber and must be prepared according to the type of company to be incorporated, and should be notarized. Documents include rental contract; notary-approved copy of ID card; Certified Public Accountant (CPA) contract; Receipt of Stamp tax for rental and CPA contracts; proof of residence; authorized signature list approved by a notary; and main company contract as entered into MERSIS. This step is only necessary for limited liability companies and corporations (respectively “limited şirket” and “anonim şirket” in Turkish). Sole proprietorships (“şahıs şirketi” in Turkish) do not need to register with the trade chamber.
- Potential tax number is a personal tax number that individuals who are not Turkish citizens must get in order to establish a company. The potential tax number must be obtained from the tax office (located at the district where the company is to be established). The documents required for the tax office application include rental contract for office or store; Notary approved ID copy; CPA contract; Receipt of Stamp tax for rental and CPA contracts; proof of residence; and authorized signature list approved by a notary. This step applies to all forms of establishments including sole proprietorships.
- A signed and "collected" stamped wire transfer receipt indicating that 0.04% of the capital is deposited in the account of Competition Authority must be obtained (only for limited companies and corporations; required when applying to the Trade Chamber).
- At least 25% of the capital must be deposited in a bank and documented. This step applies to companies and corporations only, as sole proprietorships have no minimum capital requirement.
- After application to the Trade Chamber, the Chamber informs the relevant Tax Office and Social Security Institution about the incorporation of the company. The Trade Registry Office ensures that the incorporation information is to be published in the Trade Registry Gazette within about 10 days after the registration of the company (only applies to limited companies and corporations). After the Trade Chamber informs the local tax office, a tax board must be obtained from the local tax office.⁶⁶

In addition, foreign investors are required to submit their valid passports during the company incorporation process. This is an important obstacle for the Syrian entrepreneurs in practice because the Syrian authorities raise difficulties in passport issuance and renewal processes. Syrians can also register their companies with Temporary ID cards given as part of the Temporary Protection Status. In practice however, they occasionally face difficulties at the trade chambers of various cities that are not familiar with this relatively new regulation.

⁶⁵ MERSIS is the central registry system of the Ministry of Customs and Trade to carry out trade registry processes and electronically keep the commercial registry data in a regular manner.

⁶⁶ Invest in Turkey. < <http://www.invest.gov.tr/tr-TR/investmentguide/investorguide/Pages/EstablishingABusinessInTR.aspx>>. (2018, September 26)

5.2. INSIGHTS ON ENTREPRENEURSHIP FOR SYRIAN WOMEN

KII and FGD findings indicate that there are several factors believed to be pushing Syrian women away from employment and toward entrepreneurship. Below is a list of these considerations;

- Syrian women tend to have specific demands that make it harder to find jobs, such as nearby workplaces, lenient working hours and in some cases higher than average salaries.
- Work hours are long especially in manufacturing jobs and work places are distant to where women employees live.
- FGD findings indicate that women are at particular risk of facing issues of mobbing and sexual harassment in the workplace.
- A preference for working at large corporations and open offices is highlighted, as this is associated with higher safety.
- Entrepreneurship is especially suitable for many women because that way they have more control over their working environment and hours. This is also related to their gender roles in their families as the facts stated during the FGDs demonstrate that they need to balance their time between work-childcare-household work.
- Many Syrian women are believed to have great appetite for entrepreneurship even if they never had a job before.
- KII findings indicate that there are not many cases where different entrepreneurship pathways were recommended for women and men. Nevertheless, there are two job opportunities recommended by key informants chiefly for women as opposed to men: handicrafts and beauty care. The reason why these two sectors were recommended by some key informants exclusively for women is that clientele targeted by these sectors were assumed to consist mostly of women. Male beauty experts or handicraft makers are thought to be worse at understanding and responding to customers' needs. Food production was also recommended by key informants for female entrepreneurs. *It should be noted that these are all personal opinions of the key informants and could stem from prevailing gender norms in society.*
- It is said that husbands may sometimes refuse to let their wives work but as men socialize with Turkish and Syrian people around them, they tend to relax their views.
- KIIs indicated that a good way of supporting Syrian women is to establish a system of mentorship. This would allow questions and problems about setting up and running their business to be addressed on a regular basis. They could also be prevented from taking any ruinous risks with their capital due to inexperience as many Syrian women in Turkey and, to a lesser degree, men, due to insufficient training and work experience, may be lacking the necessary financial literacy and capability required to manage cash flows and operations of an enterprise.
- Online Turkish or English language courses would also be very helpful for women, especially if they can be tied to official certifications. Language barriers are one of the main reasons why entrepreneurs have difficulties accessing financial services in Turkey, complying with local business laws and regulations and linking up with local or international suppliers and clients.

5.3. SECTORAL ANALYSIS

This research has covered a number of sectors in which Syrian young women and men may find employability and entrepreneurial opportunities. Though many sectors were reviewed to scrutinize their trends and features, some of the sectors provide more of a viable path for home-based or micro-scale start-up opportunities because of their affordable production line equipment costs or other upfront business expenditures. None of the entrepreneurs we have conducted interview with has used micro-finance opportunities provided by government, and neither of them is knowledgeable about governmental support.

During the gender-sensitive LMA discussions and interviews, the participants mentioned a number of business ideas. Participants stated that Syrians could start entrepreneurship in the areas listed below:

- Clothing Agencies and Small Clothing Stores
- Real Estate Agencies
- Travel Agencies
- Health Consultancy Offices
- ICT Entrepreneurship
- Restaurants
- Shops as per the needs of Syrian society
- Grocery stores
- Hairdressers and barbers

As for the section on Employment Pathway, it is important to note that, unless otherwise noted, all findings in this section on Entrepreneurship Pathway stem from the views of the key informants. The reporting of these views does not imply their endorsement by Save the Children but have been kept to give a more nuanced picture of the employment and entrepreneurship market.

5.3.1. Entrepreneurial Opportunities in the Textile and Clothing Sector:

Entrepreneurs in textile manufacturing industry appear to have two main routes of viable action. The entrepreneur may work as a small-scale contract manufacturer for exporters/clothing retail firms or they may work as a medium-large manufacturer to export their own products. Our interviewees have stated that many small-scale manufacturers in the market have difficulty to administer and sustain themselves in fluctuating conditions, and that illegal working conditions dominate the sector. As for the second option, large amount of investment is required to establish a factory, which target mainly European markets and able to be audited for minimum production conditions. During the KII, it was expressed that men dominate the positions of the employer and entrepreneur in textile and clothing manufacturing industry as the sector need intensive capital, personal networks and experience. This KII finding implies that women aren't thought to have capital, personal network and/or work experience. General information about the costs, skills and risks are summarized as below.

Table 46. Entrepreneurial Opportunities in Clothing Production

Size of the Entrepreneurship	Description	Technical / Soft Skills	Potential Risks	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Clothing Manufacturing (Average 20 machine)	Works as a contract manufacturer.	Having experience in the sector, customers network, ability of persuasion/bargaining, trusted financial consultant/accountant, good knowledge of Turkish, good understanding of social media.	Being swindled, overdue payments, difficulties in working permits; Lack of demand; High competition	200,000 TL (75% machinery and equipment costs; 1% registration and CPA cost for the first month; 20%- salary costs for the 1st month for 4 basic personnel (5% each; pattern cutter, sewing machine operator, modelist, quality control worker (upfront); 2% 1 month of rent cost (upfront) 2% initial utility and installation costs	Net Revenue of 8,000 / 10,000 TL per month on average	2-3 years	Key informants estimate that there are significantly more males than females who run small scale clothing enterprises.

Instead of manufacturing in textile/clothing industry, a more doable and advised entrepreneurial business for Syrian young women and men is export oriented trade or small-scaled clothing store for domestic demands.

Trading of ready apparels to MENA, Gulf regions and even Arabic speaking people in Europe is seen as an opportunity for Syrian young women and men who know Turkish and foreign markets. The most important advantage of working as an agency is that computer-based marketing research and wholesale of the ready clothings can be arranged by a small number of workers and even by the same person. During our in-depth interviews advantages of being a trading agency come to fore as an alternative textile retailing and wholesale opportunity. Turkish ready clothing factories have an undeniable amount of export leftovers and there is a demand for those leftovers from Middle East region. Knowing Arabic becomes an important asset in the export of textile and clothing agency business, and some central places such as Merter, Laleli and Mahmutpasa are the main areas of the trade. General information about the costs, skills and risks are summarized as below.

Table 47. Entrepreneurial Opportunities in Export Oriented Clothing Sector

Size of the Entrepreneurship	Description	Technical / Soft Skills	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Apparel Agency	Works as an export-oriented trading agency to mainly Arabic speaking customers	Having experience in the sector, customers network, ability of persuasion/ bargaining, trusted financial consultant/ accountant, good knowledge of Turkish, good understanding of social media.	90- 100,000 TL 10% Office Rent costs for the first 3 months 15% Warehouse Rent costs for the first 3 months 12% 3-month salary costs for a warehouse worker 10% Client and supplier meeting travel organizations for the first 3 months 15% Sales personnel cost for the 1st three months 10% Website prep. and Social Media operation costs for the first 3 months 3% Marketing materials design and printing costs 5% Registration costs and CPA and Customs agency costs for first 3 months 20% Operating cash for merchandise purchase for initial orders	Net Revenue of 5000 TL per month on average	1-2 years	The results from the LMA indicate a presence of both women and men in this field/ occupation

Running of a small-scale clothing store in a neighbourhood where Arabic speaking population lives is also an option for Syrian young women and men. Opening small boutiques for ready-to-wear clothing offering export leftovers and selling them directly or through social media have become more popular in the last years among both women and men. Nowadays many people selling the products online from home, yet there is a need to understand the demand side of the market.

Table 48. Entrepreneurship in Export Oriented Clothing Sector

Size of the Entrepreneurship	Description	Technical / Soft Skills	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Apparel Store	Works to sell apparels to mainly Arabic speaking customers	Having experience in the sector, customers network, ability of persuasion/bargaining , trusted financial consultant/accountant , some knowledge of Turkish is an advantage, good understanding of social media is an advantage.	30,000-TL 40% rent costs for the first three months; 20% store interior and exterior decoration costs; 30% 1 store attendant's salary for the first 3 months; 5% registration costs and CPA costs for the 1st 3 months 5% store utility costs for the 1st 3 months. Note: Calculations assume consignment sale agreements will be made with producers.	Net Revenue of 4-5000 TL per month	1-2 years	The results from the LMA indicate a presence of both women and men in this field/ occupation

5.3.2. Entrepreneurial Opportunities in the Hospitality Sector

Entrepreneurship in tourism sector requires significant experience as the sector consist of many components. Our interviews have demonstrated that having potential customer networks and being a registered agency provide an important advantage for new entrepreneurs. Yet, highly widespread unregistered travelling agencies are perceived as an important problem as they lead to an unfair competition.

At the beginning of starting the business, average amount of 70,000 TL (this amount is estimated to increase in near future) is paid to TURSAB (Association of Turkish Travel Agencies) for the evaluation, and approval is not always guaranteed. This evaluation mainly involves the assessment of personnel qualifications and registration documents such as authorized signatures list, certificate of commencement, criminal record document etc. TURSAB requires the recruitment of at least one certified information official to start up the travel agency, and as the exam for the certification is conducted in Turkish or English, mainly Turkish personnel is chosen by the entrepreneurs.

While many interviewees have confirmed that women are mostly more successful in the tourism sector because of their good communication skills and women dominated customers it is striking that owners of travel agencies are mostly males. This is mainly explained by the lack of cumulated capital in the hands of women and time-consuming structure of the sector. Syrian entrepreneurs who have a travel agency work both for outgoing / incoming operations and for getting residence permits. Therefore, while the agencies' main customers are composed of Arabs living in Turkey, MENA region or European countries, outgoing Turkish customers particularly living in Fatih district of Istanbul are also among their customer potential.

Main Exhibitions in the Tourism Sector: The below listed exhibitions are the most referred exhibitions by our interviewees for expanding the number of customers and networking for newly established or more experienced agencies. Particularly sectoral exhibitions may give ideas about the marketing strategies and demand side of the market. Even before involved in the sector or in the initial phases of running the business, some of the exhibitions may be visited to widen the viewpoint about the sector.

- EMITT (East Mediterranean International Tourism and Travel Exhibition), Travel Turkey, ILTM (International Luxury Travel Market)
- Sectoral Exhibitions such as hajj, health etc.

There is also a known organization made by Aida tours to bring together famous travel agencies and hotels.

Turning to food service, entrepreneurship in restaurant sector requires significant sectoral experience. Our interviewees stated that particularly choosing the location for the new restaurant is very critical. Franchising system for some restaurant brand also gives an advantage for a new starting business. Women are often not at the forefront as active players in the restaurant sector. Rather they work from their houses and produce on order bases. Its reason is influenced by cultural, social and gender norms, which make it difficult for women to work in such areas and which contribute to a lack of work experience among women from working at restaurants. While one of the females in focus group discussions aged 16 had stated that working at a restaurant may be a better alternative in comparison to textile sector as the working space is more public, the general view of female and male youth was not approving of food serving to other people as a decent work. Additionally, lack of cumulated capital and time-consuming structure of the sector because of long working hours and working many days a week are the other main factors for women not to choose restaurant sector. One of the women entrepreneurs who had invested

a small restaurant stated that she had worked with her young son, yet after her son has started to university, she had to closed down her restaurant and moved her work to her house kitchen because of heavy costs of running a restaurant.

It should be noted that in big cities, like Istanbul, there is an increasing trend of small and homemade healthy food. Therefore, carefully selecting a location based on marketing research may still give an important opportunity to women who want to specialize in the restaurant sector.

Table 49. Entrepreneurial Opportunities in Hospitality Sector

Size of the Entrepreneurship	Description	Technical / Soft Skills	Potential Risks	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Travel Agency (Average number of 4 people)	Works to organize incoming tours for different regions Turkey such as Istanbul, Yalova, Bursa, Black Sea region, Konya, Cappadocia and Mediterranean region. They also work as consultant for residence permits.	Having experience in the sector, customers network, ability of persuasion, trusted financial consultant/accountant, intermediate level of Turkish, good understanding of social media. Amadeus programming is very known for ticketing personnel. Knowledge of English is an advantage because communication with people from MENA countries sometimes require this language. High school graduation is enough. Geographical knowledge such as capitals of countries and being knowledgeable about regional specific features are expected. At least years of experience is suggested to have an understanding of customer and others shareholders in addition to all stages of operational details	Being swindled, difficulties in working permits. There is relatively higher risk of sexual harassment compared to other sectors by customers for both sexes; but women might be even more at risk compared to men.	150,000 TL 45% Registration cost to TURSAB %5 registration costs and CPA costs for the first 3 months 15% salary cost for minimum 2 team members for the first 3 months (tour organizations, administrative tasks, website management and daily operations) 15% website preparation and social media account operations 12% office rent for the first 3 months of operation 8% Operating cash for prepayments related to initial organizations	Not known	2-3 years	The results from the LMA indicate a presence of both women and men in this field/ occupation

<p>Small-scale or home-based Beauty Care Shop or Specialist (including skin care and make-up and hairdressing)</p>	<p>Provides skin care and make-up services as well as hairdressing at home or from a shop</p>	<p>Completion of a certificate program on skin care and/or make-up; good communication skills; gentleness</p>	<p>High competition depending on the exact location; failure in establishing awareness among customers; time-management</p>	<p>20,000 TL 50% Training program costs 1% Registration costs 1% CPA costs for the 1st three months 48% Equipment and accessories cost</p>	<p>2000 TL / month</p>	<p>1 year</p>	<p>Key informants estimate that there are significantly more females than males who run home-based or small-scale beauty care shops</p>
<p>Small Scale Restaurant (at least 2 workers)</p>	<p>Serves food and drinks to customers on location or via address delivery</p>	<p>Hygiene is the most important requirement for the sector. Having experience in the sector. The restaurants should be attractive to Turkish people as well. Trusted financial consultant/accountant, intermediate level of Turkish. Middle school graduation is enough. Good and respective personal relations with customers. Having knowledge about raw material suppliers.</p>	<p>Being swindled, difficulties in working permits. There is a relatively higher risk of sexual harassment or indecent behaviour in this sector for all genders, yet women might be more at risk in kitchen or serving. Bureaucratic difficulties. Having difficulties in renting suitable place.</p>	<p>40,000 TL 25% Kitchen equipment 10% Seating Area decoration 5% Exterior Decoration 40% Salary for 2 workers for the initial 2 months of operation (chef, 1 waiter) 12% Operating cash for Dish ingredients 8% Registration, Operating Licence costs and CPA cost for the first month</p>	<p>5000 TL / Month</p>	<p>1-2 years</p>	<p>Currently male dominated</p>

5.3.3. Entrepreneurial Opportunities in the Health Sector

Entrepreneurship among young women and men from Syria in the health sector is mostly found in the health tourism sector. Yet, running a business in health tourism requires having a certified travel agency or health clinic. Therefore, most of the Syrians in the sector have been working as Health Consultants for clinics or hospital chains. In most of the cases, the individual start as translator and learn medical terms, and in the later stages s/he become health consultants.

The main risk with entrepreneurship in the health sector is illegal firms which tarnishes the sector's image. The prices demanded from customers in the health tourism sector fluctuates because of the illegal firms.

Arabic customers are mainly coming from MENA countries, Africa and European countries through personnel references and social media advertisement. Hence, this sector has a potential for various occupational groups. Having social relations with hospitals/ hospital chains/clinics contribute to increase the sale channels.

Table 50. Entrepreneurial Opportunities within the Health sector

Size of the Entrepreneurship	Technical / Soft Skills	Potential Risks	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Office inside or outside of hospital	Having experience in the medical sector. intermediate level of Turkish for coordination with hotels and tour organizations of guests. High school graduation is enough. Having knowledge about social media and advertisement channels.	Being swindled, difficulties in working permits. Females have the risk of sexual harassment or improper behaviours by customers.	120,000 TL 58% Registration cost to TURSAB; 8% registration costs and CPA costs for the first 3 months; 10% salary cost for minimum 1 team member for the first 2 months (tour organizations, administrative tasks, simple website management and daily operations); 10% website preparation and social media account operations 6% office rent for the first 2 months of operation; 8% Operating cash for prepayments related to initial organizations	6,000-8,000 TL per month	1-2 years	The results from the LMA indicate a presence of both women and men in this field/ occupation

5.3.4. Entrepreneurial Opportunities in the Construction Sector

Real estate consultancy comes to fore as a construction related entrepreneurial opportunity preferred by mainly Syrians. Particularly in the districts of Istanbul which are populated by people from Arab countries, both male and female real estate experts have filled the needs of housing sector. They work both as independent agencies or selling representatives of construction companies. Yet, because of the general crises in the sectorial conditions, real estate consultants also complain about the decreases in the demand side. Another problem is unwillingness of local householders to sell or rent their houses to people from Arabic speaking countries. Therefore, being trustable and known is an important advantage for the experts.

One of the reasons for the decrease in demands for housing is conditions laid down by authorities for Syrians to buy houses. Among Syrians only the ones who have companies are allowed to buy houses and because of this conditionality, real estate agencies have gained expertise in the procedures related to residence/working permits and establishing companies. Yet, increasing number of Syrians who have Turkish citizenship is promising for the future of the sector. Additionally, according to the last regulations came into force in 2018, foreigners who buy real estate property for at least 250,000 USD and their spouses and children under 18 years old would have the exceptional right of acquiring Turkish citizenship, and therefore this is also evaluated as a hopeful development by the players of the sector.

According to our interviewees, there is an increase in the demand side for construction materials from Gulf countries. Therefore, their works expand to consultancy varieties of sectors. It is stated that Syrians are successful in the selling and real estate sector because of their sincere behaviours and service quality in customer relations. Relatively more women's inclusion and self-improvement opportunities make the real estate sector an important option for entrepreneurship.

Table 51. Real Estate Sector Entrepreneurial Opportunities

Size of the Entrepreneurship	Technical / Soft Skills	Potential Risks	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small Scale Real Estate Agency	Having experience in the sector, customers network, ability of persuasion/bargaining, trusted financial consultant/accountant, good knowledge of Turkish, good understanding of social media. Knowledge of English and even French is quite an advantage because communication with people from MENA countries sometimes require these languages. Secondary school graduation is enough.	Being swindled, risking, difficulties in working permits. There is a risk of sexual harassment or inconvenient behaviours by customers for both genders, yet women might be more at risk	25,000 TL 25% office rent for the first 3 months; 12% office interior decoration 10% Office exterior decoration (incl. illuminated signs) 20% an office computer 10% Office exterior decoration 15% Signing up to 3 online realty portals (like sahibinden.com) 5% Registration Costs and CPA costs for the 1st 3 months 3% Utility costs for the 1st 3 months of operation	4,000-5,000 TL	1-2 years	The results from the LMA indicate a presence of both women and men in this field/ occupation

5.3.5. Entrepreneurial Opportunities in the ICT Sector

A finding from the KIIs was that job and entrepreneurship opportunities for coders who can hone their skills to a sufficient extent are expected to rise in near future. It was however also reiterated that this expectation only applies to those who have considerable practice, training, and a very strong and continuous commitment to self-improvement. As gaining enough experience could take years, entry-level coders are recommended to look for employment opportunities where they can gain experience before investing in their own business.

Knowledge of English was listed as a must and for those individuals who will target Turkish companies as employers or clients, knowledge of Turkish is highly recommended. However Syrian entrepreneurs we interviewed asserted that successful coders can easily work with Syrian companies in Turkey or clients in countries where Arabic is spoken. University education is said to be preferable but not mandatory for success while certifications on one or more coding languages are said to be quite important if a university degree is lacking. Potential trainings and certifications are outlined in the next section.

All key informants mentioned KOSGEB's (Small and Medium Enterprises Development Organization of Turkey) government incentives, but with the added note that these first require the entrepreneur to complete a training conducted in Turkish, and there is a complex bureaucratic application process that one has to go through before being granted incentive payments.

Incubator centres were also mentioned as sources of funding for start-ups. Existing incubator centres in Istanbul include Turk Telekom Pilot, Starters Hub, Growth Circuit, T3 Entrepreneurship Center, Albaraka Garaj and Viveka. Albaraka Garaj is thought to be especially suitable for Syrian entrepreneurs due to the availability of Arabic-speaking staff. Common incubator services include office spaces for chosen entrepreneurs; mentorship and consultancy services; software, design and project management support; commercialization; access to investor networks and in some cases direct cash support.

Key informants emphasized that especially independent stores that provide technical support for computers or cell phones generally have low quality services or work with low quality components in Turkey. Reliable technical service stores will be able to move past competing stores quickly.

Average minimum cost for an ICT start-up starts from 25,000 TL.

Table 52. Entrepreneurial Opportunities in the ICT sector

Size of the Entrepreneurship	Technical / Soft Skills	Potential Risks	Average Minimum cost	Expected Income	Return of Investment	Existing Gender Aspect
Small-scale or home-based Web Designer or Graphic Designer (or self-employment as a web designer)	HTML CSS Adobe Dreamweaver PHP ASP Adobe Photoshop JAVASCRIPT SQL Hard-working Attention to detail Time-management Creative Good communication Skills	High competition; failing in sales/marketing; Psychological stress associated with tight deadlines and hard to communicate / understand creative demands by clients. Long hours in front of computer and associated health risks.	30,000 TL (5% registration costs; 45% for required training programs; 40% for hardware and software; 6% for monthly CPA costs for the first 2 months; 4% for initial SEO)	Not possible to expect	1 year	Currently male dominated
Small-scale or home-based Software Developer (as a firm or self-employment)	Visual Studio C# Java C++ Phyton Ruby SQL Kotlin (Android) Swift (iOS) Objective C (iOS) Hard-working Attention to detail, Time-management Creative, Good communication Skills	Failing in sales/marketing; Psychological stress associated with tight deadlines. Long hours in front of computer and associated health risks.	35,000 TL (4% registration costs; 40% for required training programs; 40% for hardware and software; 6% for monthly CPA costs for the first 2 months; 10% for SEO and social media campaign)	5,000-8,000 TL per month	1 year	Currently male dominated (but male domination is on a downward trend according to KIIs)

Small-scale Technical Support Store	Completion of a certificate programme in Smartphone Repair (requires at least intermediate Turkish); negotiation skills (with suppliers and customers); attention to detail; good communication skills	Lots of competition; eye problems; safety risks associated with high voltage components;	30,000 TL (5% registration costs; 40% for required training programs; 30% for tools and initial inventory; 25% of first 2 months operating expenses incl. rent and utilities)	3,000-5,000 TL /per month	1 year	Currently male dominated
Small-scale or home-based Online / Social Media Marketing Agency (Self-employment)	Completion of a Certificate programme in Social Media Expertise (requires at least intermediate Turkish or English); interest in social media; time management; following popular trends; good communication skills; community management; writing skills	Long hours in front of computer and associated health risks. Cyber-bullying and lynching.	25,000 TL (8% registration costs; 40% for required training programs; 52% for computer, software and other equipment)	3,000-5,000 TL per month	1 year	Currently male dominated (but male domination is on a downward trend according to KIIs)

6. MAJOR TRADE GROUPS

The major trade groups from the Construction, Hospitality, Textile, Accommodation and Hospitality, ICT, Manufacturing of Food, Manufacturing of Shoes and Retail sectors are listed below:

Table 53. Major Trade Groups in the Researched Areas

Sector	Trade Group
Construction	Istanbul Construction Chamber of Tradesman and Craftsman (ICCTC)
Hospitality	Turkish Restaurant and Entertainment Association (TURYID), Turkey Travel Agencies Association (TURSAB), Hotel Association of Turkey (TUROB)
Textile	Istanbul Textile and Confection Exporters Association (ITKIB), Association of Textile Machines Industry (TEMSAD)
Retail	Chain Stores Association (KMD), Food Retailing Association (GPD)
ICT	Information and Communication Technologies Association of Turkey (TUBIDER)
Food	Food and Drink Industry Associations of Turkey Federation (TGDF)
Shoes	Shoes Industry Association Turkey (TASD)
Education / Research	Educational Reform Initiative (ERG), Translators Association of Turkey (TUCED)
Furniture	Association of Turkish Furniture Manufacturers (MOSDER), Union of Public Woodwork
Chambers, Unions, Syndicates and Others	Istanbul Chamber of Trade (ITO), Istanbul Chamber of Industry ISO, Istanbul Union of Chambers of Tradesmen and Craftsmen (ISTESOB), SEDEFED (Sectoral Federation of Associations), Syndicate of Textile Workers, HABITAT, Refugees Association, Foundation for the Support of Women (KEDV)

Some **partnership opportunities** emerged from the discussions with these trade groups for Save the Children. Particularly TUBIDER, KEDV and TASD are interested in co-trainings to grow the number of qualified labours in their sectors.

7. HIRING PRACTICES

The main channel of hiring for the action sectors is ISKUR and UNITED WORK especially for entry and middle level positions. During this gender-sensitive LMA some participants also stated other private recruitment agencies for such positions as these agencies can recruit these staff for employers and get in contract with them in the form of service agreement. Besides these, some of the companies publish vacancies through their corporate websites. As discovered during the research, the hiring practices for the action sectors as follows:

Table 54. Hiring Practices of Action Sectors

Sector	Advertise positions in print media	Use internet-based job sites	Recruitment agencies (ISKUR)	Campus interviews at training institutions/schools/universities	Any other (please specify)
Retail					LinkedIn, United Works, Muhtar and Municipality in the small cities
Textile and Shoes					United Works, Through kinship, friends
Construction					Through kinship, friends
ICT					LinkedIn, United Works, friends, previous references
Manufacturing of Food					Through kinship, friends
Education					LinkedIn, friends, previous references
Hospitality					LinkedIn, United Works, friends, previous references
Health					LinkedIn, United Works, friends, previous references
Multi-sector					LinkedIn, United Works, friends, previous references

7.1. MAPPING OF SKILLS TRAINING ECO-SYSTEM

Skills Training

ISMEK:

Operational since 1996, Istanbul Metropolitan Municipality's Life-Long Learning Department (ISMEK) is one of the most experienced providers of vocational skills. Offering all their courses for free, they have 235 training centres which are dispersed all through Istanbul and offer a wide range of skills training in 652 branches. In addition to the skills training, they try to provide links with jobs through their employment guidance department. ISMEK is also a training partner of some companies such as Turk Telekom and sectoral organizations such as Food Retailers Association ("GPD"- *Gıda Perakendecileri Derneği*). In partnership with GPD, they opened a Retail School in Şişli district of Istanbul in 2016 where they trained 1,000 participants so far but job placement rate is only 10%. Reasons being the low job placement are education level, age and unrealistic expectations of the participants.

In addition to the Retail School, ISMEK runs the following vocational schools:

- Bahcelievler Yenibosna Informatics, Accounting and Finance, Graphic Design School
- Gungoren Merter Beauty and Hair Care Services School
- Fatih ICT School
- Fatih Bakery and Pastry School
- Uskudar Culinary School
- Sisli Fashion School
- Fatih Language School
- Fatih Entrepreneurship School
- Fatih Accounting School

ISMEK offers a number of courses related to the job opportunities identified by this gender-sensitive LMA. Courses which may be relevant among the total of 652 programs offered by ISMEK are the following:

Table 55. ISMEK Courses for Action Sectors

Name of the Course	Course Length
Web Design	264 hours
Computer Operator	163 hours
Digital Marketing	64 hours
Technical Services /Hardware	156 hours
Cosmetics Sales	64 hours
Call-Centre Representative	120 hours
AutoCAD	72 hours
Patient and Elderly Accompaniment	48 hours
KOSGEB Applied Entrepreneurship	32 hours
Communication in the Work Place	16 hours

Cashier	480 hours
Store Attendant	56 hours
Warehouse Worker	24 hours
Technological Products Sales Person	24 hours
Sewing Machine Operation	512 hours
Turkish for Foreigners A1	136 hours
Turkish for Foreigners A2	160 hours
Turkish for Foreigners B1	120 hours
Turkish for Foreigners B2	120 hours
Turkish for Foreigners C1	120 hours
Service (Servis Komisi)	192 hours
Food and Beverage Personnel	80 hours
Cook Assistant	450 hours
Pastry Assistant	750 hours
Retail Management	72 hours
Real Estate Sales /Consultant	56 hours / 120 hours
Shoes Design	120 hours
Bag and accessories manufacturing	504 hours
Professional Bread Making	96-440 hours
Computer based Accounting	559 hours
Agriculture Applications	84 hours
Dough Techniques	80 hours

ISMEK courses are open to anyone residing in Istanbul therefore they also accept Syrians. However, they offer their courses only in Turkish and are not open to offer through an interpreter. In order to access these courses, participants should register in September before the school term. Courses open once a year during the school term; they offer training at their premises only, there are plans for e-learning to be available.

ISKUR:

ISKUR is another public training provider which is specialized in vocational skills training. As being one of its legal responsibilities, ISKUR tries to understand qualified staff needs of employers through annual assessments and tries to open courses for the skills demanded by private sector through contracted training providers. These courses are open to Syrians as well if they have an ISKUR registration. ISKUR registration is an easy process of entering personal and contact information through web portal of the institution, yet it is in Turkish. As part of the training program, the following courses were offered in 2017. Columns in the table below labelled “by Males” and “by Female” indicate the popularity of courses under gender breakdown.

Table 56. Demand for Trainings Provided by ISKUR in Istanbul during 2017

Attendance (Total)	Attendance (by Males)	Attendance (by Female)
Software Developer	Software Developer	Patient Registration
Store Attendant	System Operator	Software Developer
Patient Registration	Store Attendant	Store Attendant
System Operator	Warehouse Worker	Cook Assistant
Corporate Resource Planning	Aircraft Maintenance Mechanic	Corporate Resource Planning
Warehouse Worker	Corporate Resource Planning	Childcare Expert
Cook Assistant	Logistics	Women Apparel Modelist Assistant
Aircraft Maintenance Mechanic	Retail Sale Person (Food)	Customer Relations Expert
Retail Sale Person (Food)	Solid Waste Collector	Pastry Cook Apprentice
Customer Relations Expert	Textile Worker (Apparel)	Cook Apprentice

KOSGEB:

For entrepreneurship topic, the Small and Medium Industry Development Organization (KOSGEB) is a well-known training provider by its Applied Entrepreneurship program. This training is a must for receiving government support for SMEs. This free training, which are offered through contracted training providers such as Life-Long Learning Centres of universities, take 32 hours and is offered frequently. The training offers an official certificate and Syrian young women and men is also accepted to these trainings. However, only Turkish citizens can receive financial support for entrepreneurship. Especially women entrepreneurs are supported through this program.

Online Training

With the help of new technological developments and increase of access to internet services, education does no longer require the physical gathering of students and teachers in a classroom only. Especially during the last decade, many online training platforms emerged. Some of the trade groups embrace this new medium of training delivery as well. For example, as part of an Erasmus + project, Food Retailing Association (GPD) prepared a website for retail skills training. This online platform, <http://e-learnretail.org/>, offers free training in five different languages; Turkish, German, English, Portuguese and Finnish. General Secretary of GPD stated that this platform is open to Syrian young women and men too and training materials are open for translating to Arabic.

These and many other online training options offered for free can be accessed by Istanbul Metropolitan Municipality's Internet and Information Access Centres (BELNET) scattered throughout Istanbul. Currently, there are 36 centres in the European side and 23 in the Asian side of Istanbul. Information on the locations of these centres can be accessed from <http://belnet.ibb.gov.tr/avrupa-yakasi-subeleri/> and <http://belnet.ibb.gov.tr/anadolu-yakasi-subeleri/>.

Other courses advised by our interviewees are listed below:

www.cizgi_tagem.org (2100 free online course by Niyazi Saral about ICT programming)

www.harabee.com (Entrepreneurial courses prepared by Hurabee- Entrepreneurial Consultancy and Trainings)

8. CONCLUSIONS AND RECOMMENDATIONS

8.1. OVERALL FINDINGS AND RECOMMENDATIONS

Several promising employment and entrepreneurship pathways emerged from the Phases I and II of this gender-sensitive LMA. The overall job and business recommendations of the study, described in detail in earlier sections, are summarized in tables 56 and 57. These occupations cover various sectors such as food production, healthcare, hospitality, information and communication technology, wholesale and retail trade, and textiles, apparel and shoe production.

The recommended occupations do not involve work environments where gender-based traditional social norms are observed to be prevalent. Whilst it is important to note that all sectors may possess certain levels of risk regarding discrimination or unfavourable treatment based on gender as detailed in earlier sections, this risk has not come out as significant during this LMA for the particular occupations listed below in tables 56 and 57. In addition, the occupations that appear in these tables are chosen because *all* of the following points hold true for each of these listed occupations;

- Either (i) a trait associated with Syrian refugees in Turkey may be utilized as an advantage for the listed occupation (such as knowledge of Arabic or cultural affinity to other Syrians in Turkey who make up the main customer group targeted by the occupation in question), or (ii) certain barriers against better workplace integration of Syrians in Turkey have only negligible effect in this occupation.
- There is currently unmet demand for this occupation in Turkey's job market and/or demand for this particular occupation by employers is expected to increase significantly in near future. Low number of job applications in a given sector indicates potential job opportunities for Syrian youth due to the gap in local workforce demand.
- This position is identified to be difficult to fill by sector representatives due to lack of occupational skills available in the job market. This may also point out a potential area for the skills training program in order to help participants access these available positions.
- Young Syrian women and men do not count this occupation among those they find disreputable or inhumane for themselves.
- Irregular salary payments, grueling work hours, inhumane treatment by superiors or coworkers are not reported to be a common practice for the occupation in question.
- The occupation in question endows the individual with transferrable skills that can be applied in different cities in Turkey or in other countries.
- The occupation does not present a working environment where discrimination or safety issues based on identity are common (such as those due to the refugee status or sex of the employee or entrepreneur).

Table 57. Summary of Recommended Employment Pathways

<i>Sector</i>	<i>Value Chain Phase</i>	<i>Occupation</i>
<i>Food Prod.</i>	Operations	Chef Assistant
		Master Chef
<i>Health</i>	Logistics	Patient Transfer Personnel
	Marketing and Sales	Sales Person
	Operations	Cleaning Person
		Health Consultant
		Patient Care / Care Support Personnel
		Patient Companion / Patient Relations Personnel
		Translator
Waiter / Waitress (at hospital café)		
<i>Hospitality</i>	Accommodation	Cook
		Guest Relations
		Housekeeping Assistant
		Kitchen / Cook Assistant
		Reservation / Front Desk Personnel
		Service Personnel (Hotel)
		Waiter / waitress
	Food Servicing (Restaurants)	Cook
		Head of Restaurant
		Kitchen / Cook Assistant
		Purchasing Staff
	Travel Operations	Accountant
		Assisting Personnel (Driver, Host, Hosts)
		Information Personnel
		Office Assistant
		Organization, Coordination Personnel
		Reservation Personnel
<i>Information and Communication Technology</i>	Hardware	Technical Support Expert
	Software	Business Analyst
		Coder
		Graphic Designers and Illustrators
		Web Designer and Interface Designer
<i>Shoes</i>	Operations	Assembler
		Controller
		Finishing Processer
		Modelist
		Pattern Cutter

		Shoe-upper manufacturer
<i>Textiles / Apparel</i>	Operations	Garment Worker
		Quality Control and Thread Cleaning Worker
		Sewing Machine Operator
<i>Textiles / Apparel / Shoes / Food Prod. / Wholesale and Retail</i>	Logistics	Driver
		Carrying/ Handling Worker
		Packaging Worker
		Warehouse Worker
<i>Textiles / Apparel / Shoes / Food Prod. / Wholesale and Retail / Health / Hospitality</i>	Marketing and Sales	Cashier
		Store Attendant / Sales Representative
		Call Center Representative
		Social Media Expert

Table 58. Summary of Recommended Entrepreneurial Pathways

Sector	Value Chain Phase	Business Idea
<i>Textiles and Clothing</i>	Manufacturing	Small- scale Clothing Manufacturing
	Marketing and Sales	Small Scale Apparel Export Agency
	Marketing and Sales	Small Scale Apparel Store
<i>Construction</i>	Marketing and Sales	Small Scale Real Estate Agency
<i>Hospitality</i>	Travel Operations	Small Scale Travel Agency
	Food Services	Small Scale Restaurant
	Health Tourism	Small Scale Medical Tourism Agency
	Beauty Care	Small-scale or home-based Beauty Care Shop or Specialist
<i>Information and Communication Technology (ICT)</i>	Software	Small-scale or home-based Web Designer or Graphic Designer
		Small-scale or home-based Software Developer
	Hardware	Small-scale Technical Support Store
	Marketing and Sales	Small-scale or home- based Online / Social Media Marketing Agency

In order to better integrate Syrians in Turkey into the job market and successfully support young Syrian women and men towards greater economic self-reliance, certain barriers must be addressed. These emerge from different aspects of business life such as bureaucratic difficulties, employer attitudes, challenging work environments, lack of sufficient know-how on the job search process and limited access to education and training opportunities.

Bureaucratic difficulties stem from employment quotas for Syrian employees as well as procedures for getting work permits which many Syrians in Turkey find hard-to-understand and opaque. Some employers also exacerbate this problem by trying to reduce their costs by keeping their employees unregistered. The fact that benefits of Kizilay Card for Syrians under temporary protection are tied to being unemployed also push some Syrians under temporary protection to remain unregistered as well. For entrepreneurs, low awareness on tax system and legal requirements should also be added to the list. Syrian entrepreneurs find it risky to start a registered business in Turkey as they fear making costly mistakes with respect to the taxes they have to file or business laws they need to abide by. Some who try to start a business state they cannot understand how much they have to pay for bureaucratic procedures or what documents need to be submitted.

With regards to **employer attitudes**, some employers continue to regard Syrians in Turkey as temporary visitors who might leave in near future. This perception acts as a barrier for hiring Syrians. There are other local employers who, while not believing Syrians will leave Turkey soon, still think Syrians do not have long-term career goals in Turkey and are more likely to change jobs or sectors than their Turkish counterparts. Still others view Syrians mainly as a source of cheap labour, and disregard their need for safe and decent work environments.

The **lack of sufficient awareness and know-how** on both the job search process and with respect to vocational training opportunities are other barriers preventing progress of Syrian employment and entrepreneurship in Turkey. Especially for lower-income families where young family members need to drop out of school and get a job, vocational training arrangements are vital when it comes to advancing their education.

There are also some significant **opportunities** for improvement of employment and entrepreneurship conditions of Syrians in Turkey. First of all, there are NGOs, employment agencies or governmental organizations like United Work, Istanbul Chamber of Industry, KOSGEB and ISKUR, which provide assistance to Syrians with respect to job placement and entrepreneurship. INGEV provides legal, financial and sales-marketing consultancy to Syrian entrepreneurs in Arabic.

Findings from focus group discussions indicate that especially Syrians under 18 utilize **networking** opportunities on social media to efficiently find work and training opportunities as well as learning about bureaucratic procedures related to education, entrepreneurship and employment.

With regards to the barrier of **limited access to education and training** opportunities, a number of things should be taken into account in order to improve employment and entrepreneurship skills of Syrians in Turkey. The following aspects presented below will increase the effectiveness of any employability or entrepreneurship programme to build technical, soft or academic skills of young women and men in Istanbul:

➤ **Inclusiveness and Conflict-Sensitivity**

While the Syrian population live in lower-income districts with lower-than-average education standards and quality of life, the host population living in these districts also suffer from similar conditions. Therefore, the courses should be open to both Syrian and host population members for the common aim

of empowering the vulnerable population without leading to any perception of discrimination among them.

➤ **Suitable Training Arrangements for Youth**

Because most of the female and male population work during the week and for long hours exceeding 8 hours per day, vocational training programs can only be offered during weekend and cannot exceed 120 hours if trainings are expected to be delivered in three months at maximum.

Availability of transportation may be encouraging for evening course participants in particular, because families of adolescents are highly concerned and restrictive about their children being alone outside during evening hours.

Also, especially in order to increase participation in these trainings child care could be offered during training hours. Daily incentives for transportation and food can also be offered.

➤ **Internship Opportunities**

The Turkey's pre-work and working conditions present a new environment for Syrian young males and females. Candidates who successfully complete their trainings could therefore greatly benefit from paid internship opportunities to increase their practical experience. Vocational associations and unions present channels for reaching out to private companies for such internship opportunities.

➤ **Mentorship and Role-modelling**

Particularly successful and experienced entrepreneurs should meet with the unexperienced entrepreneurs. In the same way, unemployed young females and males may gather together with role-models and experienced employees and employers. This method highly contributes to young unemployed females and males to establish new networks and gain a new vision for their future. A platform of mentors made up of successful entrepreneurs in their fields, could meet with entrepreneurs on a regular basis to offer guidance on how to run a business more efficiently and successfully. Mentors can also answer questions from entrepreneurs regarding any particular desire or concern entrepreneurs might have.

➤ **Partnership with ISKUR and Private Recruitment Agencies**

Some level of partnership with ISKUR seems highly beneficial for linking with job market, especially for jobs which are entry level or cannot be filled easily with local population members. Syrians who complete training programs can register with ISKUR for unemployment and a regular referral mechanism can be set between two organizations. Similar partnerships can be made with 'Private Employment Agencies'. United Work's program targeting open positions at Dutch companies to be filled by Syrians is a good example in this sense.

➤ **Help Young Syrians with Receiving Vocational Qualification Certificates**

Throughout the assessment, vocational certificates were reiterated by the participants as a crucial advantage. As these certificates are obtained through tests only and do not require training beforehand, they can be good for certifying existing skills of Syrians.

➤ **Reflecting Gender Perspectives into Courses and Trainings**

All the courses about employment and entrepreneurship should involve gender perspectives, such as gender equality, gender norms, discrimination, equitability and roles and responsibilities. These topics should be tackled in both Arabic and Turkish for better understanding of the issue.

Trainers, experts and consultants should also be trained and supported to effectively deliver gender-sensitive content and facilitate trainings/dialogues on topics related to gender equality. As gender is mostly found complex by many of the people in Turkey, there is a need to ensure that all the responsible trainers, experts and consultants are correctly implementing courses or trainings in a gender-sensitive manner.

The knowledge, attitudes and practices of potential employers for the course graduates should also be addressed through complementary activities to those targeting the youth.

➤ **Help Overcoming Cultural Distance**

In addition to the Turkish language skills, as indicated by many of the LMA participants as a critical element, Syrians also need Turkish cultural orientation training. Therefore, a short course can be developed either by Save the Children or a contracted training provider and such a component can be added to the training contents. Similarly, cultural awareness raising trainings can be offered to the local employees where Syrians are employed. Such efforts would have positive effects on harmonization of Syrian youth and the local population.

➤ **Eliminating the Turkish Language Barrier**

As Turkish language skills are necessary for many job opportunities at least to some extent, a well-designed Turkish language curriculum which allows rapid learning seems like a must.

During FGDs with young/adolescent females and males, and women entrepreneurs, the need for at least basic Turkish and advanced Turkish for the ones who already have started to learn Turkish was demanded. Yet, some problems related to the courses were stated as well. There is a forced choice either earning a livelihood or going to a course. As learning the hosting country's language is a central aspect for successful adaptation processes, there may be two options about learning Turkish language. The first option may give the opportunity of only taking intensive Turkish courses during day and getting paid for the livelihood during this learning process. Second option may be taking the courses in the evenings / weekends. If the training program allows for online courses and doesn't require physical presence of the trainees, then online courses or at least online course supplements could be an option too. However, as the income level goes down, availability of internet and size of internet data package also go down, so if offered, online courses may be coupled with small monthly payments to the beneficiaries for internet access throughout the course duration.

8.2. GENDER ANALYSIS AND RECOMMENDATIONS

Conclusions about Gender Perceptions

As mentioned in section 1.1.1. *The Note on Gender Sensitivity*; gender biases generally creep into our behaviour and perceptions subconsciously. It is therefore relatively easy to be gender-unaware and fail to notice what biases lie at the root of our decisions and actions. This is why a strong focus was put on making this LMA *gender sensitive* as gender has a central role in influencing equitable opportunities to the labour market and ultimately in opportunities for personal growth and self-fulfilment.

Gender roles embedded both in refugee and host societies take part in shaping the attitudes of both potential entrepreneurs and employees. For example, women entrepreneurs believe that they are more under the risk of being swindled in the first stages of their start-ups because of the general view of society towards women. The prevalent assumption in FGDs was that women think the society sees them as more “gullible” and less “commercially-minded” so they are more likely to attract individuals who have criminal intent such as committing fraud. Furthermore, male participants in the FGDs perceive the working conditions in Turkey as more tiring and restrictive, and they question Syrian females’ psychological resilience in the workplace. Overcoming such discriminatory perceptions requires not only a change in external societal attitude and norms but also support to boost the internal confidence and self-perceptions among women (as well as among other marginalized groups).

FGDs and KIIs with both female and male participants also illustrated how gender norms play a very strong role in the society, e.g. with regards to deciding on the most suitable or most “respectable” jobs for particularly women. The notion of “respectable” jobs demonstrates the complexity of integration of particularly women in the labour market. Such social norms challenge the smooth identification of jobs and access to economic opportunities based on an individual’s skills and interests. As an example of “respected” jobs, women are not included in the food service sector, and they are suggested to work from their houses and produce on order bases. These cultural, social and gender norms make it difficult for women to access certain platforms or work areas, which in turn leads to relative lack of work experience in comparison to men. In the scope of this project, this scenario has been particularly visible the ICT sector. Therefore, such norms are indeed critical to both identify and address in order to promote more equal and equitable access to language or technical education as well as opportunities to enhance the work experience.

Gender perceptions are significantly visible in business relations between men and women. Some women entrepreneurs state that their husbands do not allow them to establish a partnership with a man or work at offices where they will have to interact with men socially. In comparison to men, women also feel more exposed to the risk of harassment. Workplace safety is a higher priority for women than it is for men. This viewpoint is expressed by both men and women; both sexes listed this concern among the key factors that should be taken into consideration when a woman applies for a job or starts a business.

Moreover, culturally shaped gender roles for both males and females are highly visible in the tones of FGD and KII participants during the discussions. Adolescent and young males indicate a stronger adherence to traditional gender roles that are related to women's participation in employment and family roles. While

males strongly question who is going to be responsible for housework and childcare in case a married woman starts to work, females question why they are the only responsible individuals about housework and childcare. According to adolescent and young females, their families are less restrictive in Turkey in comparison to how they were in Syria. This demonstrates immigration's effect on changing gender roles adopted by families towards their daughters.

Regardless of gender, refugee community members face considerable risk when it comes to discontinuation of education for the sake of starting to work early in life. Whilst men tend to feel more responsibility to earn their families' livelihood, women tend to feel that if they drop their education there is a risk of early and forced marriage. Particularly Syrian adolescent males feel that the working environment in Turkey is very tiring. However, as their families' survival depends on their work, they are generally involved in low-skill, labour-intensive jobs. There is a trade-off between tiring/more disadvantageous earning and a well-behaved work atmosphere.

The willingness to return Syria is also highly influenced by gender and societal expectations for men and women. The first priority of men is their security as they are under the risk of being recruited to military if they return to Syria. Some females are keener to return to Syria as they feel the social environment is less risky and more familiar. They also think it is more advantageous to put their education into practice in their homeland.

While social inclusion is very important in the decision of staying in Turkey, it does not always mean there is a causal relationship. In the young female group, it is observed that factors such as having a social environment and prospects for having a good job in Turkey facilitate their decision of stay in Turkey, yet the young women state that they are likely to be influenced by their family's overall decision on whether or not to return to Syria. Young men indicate that they have a more dominant role in the process of making that decision. Yet, in any case, both males and females, in general, prefer to complete their education in Turkey and hold business and social relations in both Turkey and Syria.

Recommendations

Working holistically, at individual, family, community and societal levels, in order to address discriminatory attitudes and practices is crucial. In addition to enhancing awareness on gender equality among the participants directly targeted by Save the Children project, their parents, siblings, friends, employers, and co-workers should also be targeted. Knowledge of how gender biases affect family life, workplace and decision-making processes should be improved. Further ongoing efforts to influence attitudes and practices will also be necessary.

To this end, periodic research/review is advised in order to assess the prevalence of gender biases among participants of the employability and entrepreneurship pathways as well as among the wider Syrian and host communities involved in the project. Such initiatives should aim to correctly gauge the progress toward gender sensitivity and take timely precautions when necessary.

In general, there appear to be no guidelines similar to, for instance, that of UN's The Inter-Agency Standing Committee (IASC)⁶⁷ widely known in Turkey for designing gender-sensitive livelihood projects. A

⁶⁷ IASC Gender Handbook; Gender and Livelihoods in Emergencies, <http://www.ungei.org/09.pdf>

recommendation would therefore also be to facilitate translation, adaptation, and implementation of such guidelines to inform gender-sensitivity in livelihood programming.

Part-time jobs and open education prospects present opportunities to carry on with vocational training or education while earning an income. As mentioned above, men tend to find it hard to spare time for full-time training programs due to their responsibilities for livelihood generation, whilst women tend to find it hard to devote time to work due to childcare responsibilities. The possibility of home-based entrepreneurship would significantly help women in this respect especially when their concerns for negative treatment at the workplace and long commutes or working hours are taken into consideration.

Training programs should also factor in the need for safe transportation especially for women participants. According to research findings, providing shuttle services for specific districts would make it much easier for those who are in need of such programs to participate.

Also, especially in the case of women, access to quality daily childcare services should be supported for women who cannot leave their children at home.

When designing livelihood generating training programs, it is important to take into consideration that traditionally women and men have different roles and skillsets bestowed upon them by the prevailing gender roles in the society. It is therefore important to consider the “non-traditional” occupations women and men may have based on their personal skills and interests. This would also prevent over-saturating existing occupations that are already crowded due to the influence of traditional gender roles.

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10. ANNEXES

Annex 1 – FGD Participants

Table 59. Phase 1 Syrian Female Entrepreneurs FGD Participant List

Number	Name	Age	Entereprise Sector	Education	District
1	F.	47	Food Production (unregistered)	High school	Esenler
2	S.	37	Cosmetics (registered)	University (Pharmacy) with master degree	Basakşehir
3	A.	45	Education (registered)	University (Dentist)	Fatih
4	K.	45	Distance Education (registered)	University (Arabic Teacher)	Esenyurt
5	N.	44	Health beauty centre (registered)	University (Pharmacy)	Fatih
6	S.	36	Education and trainings centres (registered)	University, previously worked at trade sector	Bahçeşehir
7	R.	43	Real estate investment and advertising (registered)	University, previously worked at news channels	Esenyurt
8	A.	44	Syrian sweets/Knitting (unregistered)	University, previously worked as Math Teacher	Esenler

Table 60. Phase 1 Syrian Female Youth (18-24 years old) FGD Participant List

Number	Name	Age	Current Occupation	Education	District
1	H.	24	Married, not allowed to work	Dropped her Law Education	Esenler
2	S.	19	Not working looking for a job	High school Graduate	Esenyurt
3	Z.	22	Working	University student	Gaziosmanpaşa
4	E.	21	Not working looking for a job	University student	Esenyurt
5	N.	24	Not working looking for a job	University Graduate	Esenyurt
6	A.	24	Not working looking for a job	University student	Fatih

Table 61. Phase 1 Syrian Female Adolescents (15-17 years old) FGD Participant List

Number	Name	Age	Current Occupation	Education	District
1	F.	16	Working	Studying at high school	Esenler
2	I.	17	Working	Studying at high school	Esenyurt
3	R.	17	Not working looking for a job	Studying at high school	Fatih
4	S.	17	Not working	High school graduate. Prepare for university exam	Sultangazi
5	F.	17	Not working	High school graduate. Prepare for university exam	Fatih
6	E.	17	Working	Studying at high school	Esenler
7	F.	16	Working	High school graduate	Esenler
8	M.	17	Not working looking for a job	Studying at high school	Esenyurt

Table 62. Phase 1 Syrian Male Adolescents (15-17 years old) FGD Participant List

Number	Name	Age	Current Occupation	Eğitim	District
1	B.	15	Worked before. Now he is studying, yet looking for a job as well.	Middle School 9th grade	Gaziosmanpaşa
2	S.	17	Bag Factory	Graduate of primary school	Esenyurt
3	H.	17	Worked before	Graduate of High School. In the process of university preparation	Esenyurt
4	T.	16	Looking for a job	Graduate of primary school	Esenyurt

Table 63. Phase 1 Syrian Male Youth (18-24 years old) FGD Participant List

Number	Name	Age	Current Occupation	Eğitim	District
1	M.	22	Working	High school graduate	Esenler
2	A.	22	Working	High school graduate	Esenyurt
3	M.	19	Working	Studying at high school	Fatih
4	A.	18	Not working	Studying at high school	Sultangazi
5	M.	19	Not Working	High school student. Prepare for university exam	Fatih
6	M.	24	Not working looking for a job	High school graduate	Esenler
7	A.	18	Not working looking for a job	High school student	Esenyurt

Annex 2 – KII and IDI Participants –

Table 64. Phase 1 Key Informant Interview Respondent List

Agency/Organization/Institution	Name of the Respondent(s)
ISMEK- MUNICIPALITY OF ISTANBUL ARTS AND VOCATIONAL TRAINING ORG.	ALI ALBAYRAK and ONUR CAKMAK
ISO- ISTANBUL CHAMBER OF INDUSTRY	SINEM KOVANCI
ISTESOB- ISTANBUL UNION OF CHAMBER OF MERCHANTS AND CRAFTSMEN	FAIK YILMAZ
ITO- ISTANBUL CHAMBER OF COMMERCE	HAKAN ARCA
UNITED WORK	HASRET GUNES
KEDV- FOUNDATION FOR THE SUPPORT OF WOMEN'S WORK	SERRA CANKUR
HABITAT	SEVAL KALKAN
Association of Textile Machines Industry (TEMSAD)	HAYRI ETCI
Association of Turkish Furniture Manufacturers (MOSDER)	GURAY GURSES
Union of Public Woodwork	CAFER YUMAK

Table 64. Phase 2 Key Informant Interview / In Depth Interview Respondent List

Agency/Organization/Institution	Name of the Respondent(s)
TARBUSH Restaurants Chain (Syrian)	Muhammed Nizar Bitar
Medical Park Hospital Florya Branch	Muhammed Kadioglu
UNITEKS	Murat Harmankoy
De Facto	Sinem Savuran
Hurabee (Entrepreneurial Consultancy and Trainings)	Sinan Hatahitoglu ve Mizyan Al Tavit
GEZER	Selcuk Sen
Akademi Istanbul Language Center	Serap Ongel
Sumer Seyahat A.S. (Outgoing travel agency)	Niyazi Sisman
Emir Tourism (Syrian) (Incoming and outgoing travel agency)	Firas Alnemr
Muhtar Sweets	Omar Zeydoglu
Gurbetna (Syrian)	Mujahid Akil
Real Estate Firm	Mehmet Samir Habes
Turkey Travel Agencies Association (TURSAB)	Seda Kutluk / Kaan Sak
Food Retailing Association (GPD)	Soydan Cengiz
Chain Stores Association (KMD)	Soydan Cengiz
Shoes Industry Association Turkey (TASD)	Nevzat Tecer
Food and Drink Industry Associations of Turkey Federation (TGDF)	Canan Elibollar
Syndicate of Textile Workers	Ergun Iseri
Educational Reform Initiative (ERG)	Ozgenur Korlu - Gözde Ertekin
Information and Communication Technologies Association of Turkey (TUBIDER)	Niyazi Saral
Translators Association of Turkey (TUCED and TUCEF)	Ahmet Varol
SEDEFED (Sectoral Federation of Associations)	Emre Tamer
Refugees Association (Sultanbeyli) ICT expert	Ahmet Aktas
Freelance ICT expert	Ahmet Kassas
Robotel	Zeynep Karagöz

During LMA, the following employers have been interviewed and participated in FGDs.

Table 65. Employers Consulted

Sector	Trade Group
Hospitality	TARBUSH Restaurants Chain (Syrian), Emir Tourism (Syrian), Sumer Seyahat A.S.
Health	Medical Park Hospital Florya Branch
Textile	UNITEKS
Retail	De Facto
Entrepreneurship Consultancy	Hurabee
Manufacturing of Shoes	GEZER
Education	Akademi Istanbul Language Center
Manufacturing of Food	Muhtar Sweets
ICT	Gurbetna (Syrian), Ahmet Kassas (Freelence), Robotel
Real Estate Entrepreneur	Mehmet Samir Habes

Among them, especially employers from GEZER are interested in recruiting Syrian young women and men. A Chain of TARBUSH restaurant is keen for partnership in trainings, internship programs, franchising of the brand.

Annex 3 – Istanbul Population by District

Table 66. Istanbul Population by Districts

Istanbul Districts	Male	Female	Total	% in total
Esenyurt	456,552	434,568	891,120	5.9
Küçükçekmece	385,154	385,163	770,317	5.1
Bağcılar	372,311	362,058	734,369	4.9
Pendik	350,302	343,297	693,599	4.6
Ümraniye	345,478	344,715	690,193	4.6
Bahçelievler	298,175	295,878	594,053	3.9
Üsküdar	257,831	271,314	529,145	3.5
Sultangazi	266,629	257,136	523,765	3.5
Maltepe	248,023	249,011	497,034	3.3
Gaziosmanpaşa	244,474	242,572	487,046	3.2
Kartal	228,034	233,121	461,155	3.1
Kadıköy	207,069	251,569	458,638	3.0
Esenler	227,440	217,121	444,561	3.0
Kağıthane	220,089	216,937	437,026	2.9
Fatih	221,118	215,421	436,539	2.9
Avcılar	217,653	217,972	435,625	2.9
Başakşehir	215,652	212,183	427,835	2.8
Ataşehir	203,686	212,632	416,318	2.8
Sancaktepe	210,194	203,949	414,143	2.8
Eyüp Sultan	191,951	191,958	383,909	2.6
Sarıyer	169,304	173,199	342,503	2.3
Beylikdüzü	161,876	169,649	331,525	2.2
Sultanbeyli	167,763	160,035	327,798	2.2
Güngören	145,936	143,395	289,331	1.9
Zeytinburnu	142,052	142,883	284,935	1.9
Şişli	133,500	140,789	274,289	1.8
Bayrampaşa	135,907	135,166	271,073	1.8
Arnavutköy	140,662	129,887	270,549	1.8
Tuzla	130,360	125,108	255,468	1.7
Çekmeköy	126,336	125,601	251,937	1.7
BUyUkçekmece	122,755	124,981	247,736	1.6
Beykoz	122,109	124,591	246,700	1.6
Beyoğlu	118,273	112,253	230,526	1.5
Bakırköy	103,677	118,991	222,668	1.5
Silivri	106,014	81,607	187,621	1.3
Beşiktaş	82,810	98,264	181,074	1.2
Çatalca	37,675	35,291	72,966	0.5
Şile	18,805	17,711	36,516	0.2
Adalar	8,602	7,517	16,119	0.1

Source: TURKSTAT, 2018

Annex 4 – Manufacturing Turnover Index

Table 67. Manufacturing Turnover Index, 2005-2017 (2010=100)

Manufacturing Turnover Index 2017 (2010=100)	Turnover Index
C-Manufacturing	257
10-Manufacture of food products	231
11-Manufacture of beverages	211
12-Manufacture of tobacco products	199
13-Manufacture of textiles	247
14-Manufacture of wearing apparel	228
15-Manufacture of leather and related products	203
16-Manufacture of wood and products of wood and cork (except furniture)	232
17-Manufacture of paper and paper products	295
18-Printing and reproduction of recorded media	193
19-Manufacture of coke and refined petroleum products	241
20-Manufacture of chemicals and chemical products	245
21-Manufacture of basic pharmaceutical products and pharmaceutical preparations	200
22-Manufacture of rubber and plastic products	275
23-Manufacture of other non-metallic mineral products	228
24-Manufacture of basic metals	271
25-Manufacture of fabricated metal products (except machinery and equipment)	267
26-Manufacture of computer, electronic and optical products	246
27-Manufacture of electrical equipment	279
28-Manufacture of machinery and equipment n.e.c.	308
29-Manufacture of motor vehicles, trailers and semi-trailers	337
30-Manufacture of other transport equipment	257
31-Manufacture of furniture	243
32-Other manufacturing	159
33-Repair and installation of machinery and equipment	371

Source: TURKSTAT, 2018

Annex 5 – Trade and Services Indices

Table 68. Trade and Services Indices, 2005-2017 (2010=100)

Trade and Services Indices 2017 (2010=100)	Turnover Index	Employment Index	Salary Index	Average Index value
Trade and Services	218	110	246	191
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	218	114	251	194
45 - Wholesale and retail trade and repair of motor vehicles and motorcycles	280	112	251	214
46 - Wholesale trade, except of motor vehicles and motorcycles	213	97	207	172
47 - Retail trade, except of motor vehicles and motorcycles	213	122	300	212
H - Transportation and storage	228	106	242	192
49 - Land transport and transport via pipelines	186	105	209	166
50 - Water transport	163	92	175	144
51 - Air transport	401	164	351	305
52 - Warehousing and support activities for transportation	254	114	263	210
53 - Postal and courier activities	221	96	192	170
I - Accommodation and food service activities	194	103	233	177
55 - Accommodation	184	102	207	164
56 - Food and beverage service activities	200	103	254	186
J - Information and communication	202	92	180	158
58 - Publishing activities	108	80	183	124
59 - Motion picture, video and television program production, sound recording and music publishing activities	236	124	276	212
60 - Programming and broadcasting activities	198	95	182	158
61 - Telecommunications	197	86	146	143
62 - Computer programming, consultancy and related activities	278	97	219	198
63 - Information service activities	186	103	268	186
M - Professional, scientific and technical activities	193	102	245	180
69+702 - Legal, accounting and management consultancy activities	205	102	241	183
71 - Architectural and engineering activities; technical testing and analysis	216	114	314	215
73 - Advertising and market research	167	75	170	137
74 - Other professional, scientific and technical activities	186	116	216	173
N - Administrative and support service activities	244	116	294	218
78 - Employment activities	201	101	190	164
79 - Travel agency, tour operator reservation service and related activities	240	115	249	201
80 - Security and investigation activities	321	132	345	266
812 - Cleaning activities	237	107	291	212
82 - Office administrative, office support and other business support activities	221	135	268	208

Source: TURKSTAT, 2018

Annex 6 – Employment and Open Positions by Sectors

Table 69. Employment and Open Positions by Sectors

	No of Comp	Male Employee	Female Employee	Total	% of Empl	% of Open Positions
Manufacturing	10,872	447,546	184,447	631,993	31	43.8
Wholesale and retail trade	6,899	209,231	97,478	306,710	19	14.4
Construction	4,960	194,860	19,948	214,808	14	6.4
Professional, scientific and technical act.	2,092	140,301	71,806	212,106	6	3.0
Hospitality and Accommodation	2,067	92,630	21,556	114,186	5	7.9
Administrative and Support Services	1,979	78,832	28,598	107,430	6	8.5
Transportation and Warehousing	1,747	51,529	35,760	87,289	6	3.0
Information and communication	968	42,344	39,135	81,480	1	5.7
Education	945	40,507	22,650	63,157	3	0.9
Health	805	23,004	34,559	57,564	3	1.8
Other Service Activity	540	19,978	37,585	57,563	2	1.4
Real Estate Activities	517	15,178	6,656	21,834	1	0.5
Finance and Insurance Services	483	13,460	7,627	21,087	2	2.0
Culture, Art, Sports, Recreational Act.	201	7,081	3,225	10,306	1	0.4
Energy	151	6,359	1,843	8,201	0	0.2
Water, Sewage, Waste management	130	3,359	653	4,012	0	0.1
Mining	128	3,157	436	3,593	0	0.1
Istanbul Total	35,485	1,389,356	613,965	2,003,321	100%	100%

Source: ISKUR IPA Report, 2018

Annex 7 – Education Requirements by Sectors (last available data with educational data were published in 2016)

Table 70. Education Requirements by Sectors (last available data with educational data were published in 2016)

	Education Not important (%)	High School or Lower (%)	University (%)
Manufacturing	44	46	10
Wholesale and retail trade	15	67	18
Construction	10	50	40
Accommodation	23	75	2
Administrative and support service	23	72	5
Professional, scientific and technical activities	0	40	60
Transportation	22	44	35
Information and communication	14	14	73
Health	6	44	50
Education	3	31	66
Other Service Activity	54	43	3
Finance and ins	3	23	75
Real estate activities	33	25	42
Culture Art	38	38	24
Mining	57	44	0
Water	50	35	15
Energy	0	22	78
Total	28%	54%	18%

Source: ISKUR IPA Report, 2016

Annex 8 – Employment Expectations

Table 71. Employment Expectations

	Increase (%)	Decrease (%)	No Idea (%)	No Difference (%)
Manufacturing	24.8	2.7	46.0	26.4
Wholesale and retail trade	18.2	2.0	45.7	34.1
Construction	17.2	3.1	49.8	29.8
Accommodation	17.3	2.2	50.6	29.9
Administrative and support service	15.3	2.2	55.3	27.3
Professional, scientific and technical activities	16.0	2.6	54.6	26.8
Transportation	16.1	1.5	49.1	33.3
Information and communication	19.5	1.4	41.9	37.2
Health	18.8	0.8	50.2	30.1
Education	19.2	0.5	47.2	33.2
Other Service Activity	19.5	5.5	43.2	31.8
Finance and ins	11.7	3.4	41.3	43.7
Real estate activities	9.8	0.0	45.1	45.1
Culture Art	13.2	1.1	46.6	39.1
Mining	12.3	0.9	45.6	41.2
Water	12.1	1.7	46.6	39.7
Energy	4.4	2.2	41.6	51.8
Istanbul average	19.4 %	2.4 %	47.8 %	30.4 %

Source: ISKUR IPA Report, 2018

Annex 9 – Reasons for the difficulty in filling jobs (in occupational breakdown)

Table 72. Reasons for the difficulty in filling jobs (in occupational breakdown)

	Application (%)	Occupational skill (%)	Experience (%)	Work Environment (%)	Wages salaries (%)	Working hours (%)	Hazard. jobs (%)
Machine operator (sewing)	88	57.1	51.0	23.7	19.3	5.1	4.6
Figuran / Extra	100	0	0	0	0	0	0
Security Guard	18.0	85.1	49.5	49.3	51.1	46.3	36.8
Blue-collar Worker (general)	77.3	18.7	9.6	32.6	22.1	8.9	7.7
Waiter	64.1	80.0	73.9	19.3	38.4	29.6	15.2
Cleaning Staff	45.8	65.0	36.2	38.7	26.6	7.4	10.6
Sales Representative	36.9	87.2	60.4	5.3	14.0	0.7	0
Garment Worker	88.4	61.6	10.5	0	0	0	0
“Ortacı/Ayakçı” (Textile)	81.8	35.4	47.0	12.9	16.7	1.2	0
Quality Control (Textile)	97.4	39.3	23.6	0	0	0	0

Source: ISKUR IPA Report, 2018

Annex 10 – Retail Turnover Index

Table 73. Retail Turnover Index

Retail Type	Years	Turnover Index (2015=100)
Retail Trade (except motorized vehicles and motorcycles)	2016	109.5
	2017	130.3
	2018	155.0
Online Retail and Retail through Postal Services	2016	112.1
	2017	140.5
	2018	202.0
Food, Drink and Tobacco Retail	2016	111.6
	2017	128.8
	2018	153.8
Textile, Clothing, Shoe and Leather Products Retail Trade	2016	112.7
	2017	131.8
	2018	163.4
Computers, peripheral units and SW, books, telecom appl.	2016	106.7
	2017	123.9
	2018	141.9
Audio and video equipment, HW, paints and glass, electrical household appliances, furniture etc.	2016	107.9
	2017	127.6
	2018	142.1
Pharmaceutical goods, medical and orthopedic goods, cosmetics and toilet articles	2016	116.8
	2017	137.4
	2018	175.3

Source: TURKSTAT, 2019

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

FOCUS GROUP DISCUSSION QUESTIONS – SYRIAN WOMEN ENTREPRENEURS

Objective: The discussion will capture the target population’s perspective on the opportunities and constraints they face in developing and managing a business.

Timing: The discussion length is flexible depending on how much time you have available. However, ideally you should allow approximately 90 minutes-2 hours for this discussion. At a minimum you should allow 60 minutes for the discussion, and it should not exceed 2.5 hours.

Instructions: A facilitator should ask the questions below to the group. Read all questions aloud and record answers. Give participants enough time to think about each answer, and try to ensure that all group members are participating across different questions.

FGD DETAILS

Facilitator(s):

Location:

Date:

Number of Participants:

Key characteristics of group (e.g., youth, people with disabilities, etc.):

Age range of participants:

FGD INTRODUCTION

Welcome to our focus group discussion. Thank you for your time today. My name is _____ and I am supporting Save the Children with a labour market assessment.

During this discussion, we’ll be asking you about the kinds of jobs and businesses you are managing in your community, and what skills, resources or other support you think other women will need to find good work [*or start your own business*]. We are getting this information in order to help make sure that any employment and business programs at the SC are relevant to the needs, interests and the opportunities that are actually available.

We will use the information to design and improve our programs, but we will not use your name. We hope that you will also not share specific individuals’ comments outside this group. Please know that participation is voluntary. You may leave at any time, and you do not have to answer any questions you do not want to. However, we hope you stay because we are very interested to hear your opinions.

This discussion will take approximately 90 minutes. Whenever you have an opinion or something to say, please speak up. You do not need to speak in order or answer every question. There is no right or wrong answers; we just want to hear your opinions. It is also okay to disagree with other people; we want to know what everyone thinks and we know you all may have had very different experiences!

Do you understand what we are trying to do? Do you agree to participate? Do you have any questions for us before we start? *If everyone is willing, please start the discussion.*

FGD QUESTIONS

Being an Entrepreneur

1. Can each of you share with the group how you started your own business? How did you come up with the idea and how did you start your business?
2. How many employees you have working for you? How many of them are women?
3. What has been the biggest challenge for you as an entrepreneur?
4. How do you solve your big business problems?
5. Did or do you have any mentors or coaches that helped you with your business?
6. How has being an entrepreneur affected your family life? *Prompt: While at work who took over the domestic responsibilities and child caregiving?*
7. How did male figures in your family or community react to you earning an income at first, and what about now? *Prompt: What did you do to gain the support of male family figures?*

The Market and Women Entrepreneurs

8. In your opinion what are the biggest obstacles Syrian female youth will encounter in starting a business?
9. Taking into consideration the job market Turkey, what are the advantages for Syrian youth females? What sector do you think render more opportunity for Syrian women and youth?
10. What skills training and knowledge should Syrian female youth receive so they too can be successful entrepreneurs in the future?
11. Are you knowledgeable about the state sponsored programs, policies, grants, subsidies, funds, and regulations? Please explain in detail.
12. What kind of a support would you like to see from government?
13. What would you like to add about women entrepreneurship?

Conclusion: Thank the participants for their time and lively discussion. Remind them that their comments will remain anonymous and if they have additional information, they can come share it with you in person.

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

FOCUS GROUP DISCUSSION QUESTIONS – SYRIAN MALE

Objective: The discussion will capture the target population’s perspective on the opportunities and constraints they face in accessing satisfactory employment and business opportunities, along with their work-related interests and the support they would need (in terms of resources, skills, capital and anything else) to find better work. It will also help to identify sectors and/or positions that are appealing and relatively accessible to the target population that can be further researched in the market assessment.

Timing: The discussion length is flexible depending on how much time you have available. However, ideally you should allow approximately 90 minutes-2 hours for this assessment. At a minimum you should allow 60 minutes for the discussion, and it should not exceed 2.5 hours.

Instructions: A facilitator should ask the questions below to the group. Read all questions aloud and record answers. Give participants enough time to think about each answer, and try to ensure that all group members are participating across different questions.

FGD DETAILS

Facilitator(s):

Location:

Date:

Number of Participants:

Key characteristics of group (e.g., youth, people with disabilities, etc.):

Age range of participants:

FGD INTRODUCTION

Welcome to our focus group discussion. Thank you for your time today. My name is _____ and I am supporting Save the Children with a labour market assessment.

During this discussion, we’ll be asking you about the kinds of jobs and businesses available in your community, which of these are most interesting to you, and what skills, resources or other support you think you need to find good work [*or start your own business*]. We are getting this information in order to help make sure that any employment and business programs at the SC are relevant to your needs and interests and the opportunities that are actually available. Please note that participation in this discussion does not guarantee that you will be able to participate in any SC program or that SC will provide you with any assistance.

Group opinions and insights may be shared within our organization and with program partners. We will use the information to design and improve our programs, but we will not use your name. We hope that you will also not share specific individuals’ comments outside this group. Please know that participation is voluntary. You may leave at any time, and you do not have to answer any questions you do not want to. However, we hope you stay because we are very interested to hear your opinions.

This discussion will take approximately 90 minutes. Whenever you have an opinion or something to say, please speak up. You do not need to speak in order or answer every question. There is no right or no wrong answers; we just want to hear your opinions. It is also okay to disagree with other people; we want to know what everyone thinks and we know you all may have had very different experiences!

Do you understand what we are trying to do? Do you agree to participate? Do you have any questions for us before we start? *If everyone is willing, please start the discussion.*

FGD QUESTIONS

Existing Work and Income

1. What is your current education level?
2. Do you make money? If yes, what do you do to earn an income?
3. Do most people like you have multiple ways of making money, and if so, what are they? What do you consider your main source of income currently?
4. Are most refugees satisfied with these ways of making money in Turkey? If not, why not?
5. What are the most reputable and unacceptable professions in your country for men and women?
6. How much money do you think you need in one day to support yourself (or to help support your family)? What is the minimum amount of money you would accept for work?
7. Where/how do people like you find out about job opportunities?
8. What sort of educational opportunities, vocational training, or job experience do you normally get? Where do you typically receive job training and experience?

Market and Job Opportunity Knowledge

9. Is there a difference in the types of work you do versus the kind of work other communities do? *[For example, do (refugees, women, youth, etc.) work more in some sectors over others?]*
10. In your community, are there differences in the types of work appropriate for women and appropriate for men? *[For example, women expected to work from home; women are expected to work part-time outside of the home to keep up with childcare responsibilities; women feel unsafe working a night shift or in certain neighborhoods]*
11. Do you think the business environment in Turkey is available/supportive for your first level female relatives?
12. Do most people you know work for someone else, or do they run their own businesses? *Prompt: If people know someone who owns their own business, what did these people need to start their own business?*

13. What types of businesses do you know in this community that are most successful? *Prompt the group for examples of male and female run businesses.*
14. What are some reasons these businesses are especially successful? *(Try to elicit at least 5 reasons from the group.)*
15. What are some skills that these successful business owners possess that others may not? *(Try to elicit at least 5 skills from the group.)*
16. What other employment or self-employment opportunities are there in this community, besides the ones we have just discussed?

Group's Work-Related Interests, Challenges and Needs

17. Aside from work you are already doing, what kinds of work would you be interested in doing, and why?
18. What are the most important qualities, skills, or assets that people need to get jobs or start businesses? *(Prompt: Are there any factors – age, gender, family – that would make it easier for some to find employment than others?)*
19. What are the biggest obstacles to you for finding employment or starting a business? *(e.g. resources, connections, training, transportation, financing, equipment, community acceptance, etc.)?*
20. How can you develop the skills you need to find a job or start a business? What makes it difficult to learn these skills?
21. If vocational activities were offered to you, what are the obstacles that might prevent you from attending the vocational activities and other activities?
22. What would be the most ideal times for your attendance?
23. Is there anything else you'd like to share?

Conclusion: Thank the participants for their time and lively discussion. Remind them that their comments will remain anonymous and if they have additional information, they can come share it with you in person.

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

FOCUS GROUP DISCUSSION QUESTIONS – SYRIAN FEMALE

Objective: The discussion will capture the target population’s perspective on the opportunities and constraints they face in accessing satisfactory employment and business opportunities, along with their work-related interests and the support they would need (in terms of resources, skills, capital and anything else) to find better work. It will also help to identify sectors and/or positions that are appealing and relatively accessible to the target population that can be further researched in the market assessment.

Timing: The discussion length is flexible depending on how much time you have available. However, ideally you should allow approximately 90 minutes-2 hours for this assessment. At a minimum you should allow 60 minutes for the discussion, and it should not exceed 2.5 hours.

Instructions: A facilitator should ask the questions below to the group. Read all questions aloud and record answers. Give participants enough time to think about each answer, and try to ensure that all group members are participating across different questions.

FGD DETAILS

Facilitator(s):

Location:

Date:

Number of Participants:

Key characteristics of group (e.g., youth, people with disabilities, etc.):

Age range of participants:

FGD INTRODUCTION

Welcome to our focus group discussion. Thank you for your time today. My name is _____ and I am supporting Save the Children with a labour market assessment.

During this discussion, we’ll be asking you about the kinds of jobs and businesses available in your community, which of these are most interesting to you, and what skills, resources or other support you think you need to find good work [*or start your own business*]. We are getting this information in order to help make sure that any employment and business programs at the SC are relevant to your needs and interests and the opportunities that are actually available. Please note that participation in this discussion does not guarantee that you will be able to participate in any SC program or that SC will provide you with any assistance.

Group opinions and insights may be shared within our organization and with program partners. We will use the information to design and improve our programs, but we will not use your name. We hope that you will also not share specific individuals’ comments outside this group. Please know that participation is voluntary. You may leave at any time, and you do not have to answer any questions you do not want to. However, we hope you stay because we are very interested to hear your opinions.

This discussion will take approximately 90 minutes. Whenever you have an opinion or something to say, please speak up. You do not need to speak in order or answer every question. There is no right or no

wrong answers; we just want to hear your opinions. It is also okay to disagree with other people; we want to know what everyone thinks and we know you all may have had very different experiences!

Do you understand what we are trying to do? Do you agree to participate? Do you have any questions for us before we start? *If everyone is willing, please start the discussion.*

FGD QUESTIONS

Existing Work and Income

1. What is your current education level?
2. Are you currently working? If yes, what do you do to earn an income? If not, what is the main source of your household income?
3. Do most women have methods to earn money in your community, and if yes, what are they doing?
4. Are most male and female refugees satisfied with these ways of making money in Turkey? If not, why not?
5. What are the most reputable and unacceptable professions in your country for men and women?
6. Do you think women should earn money and support their families financially too?
7. How much money do you think you need in one day to support yourself (or to help support your family)? What is the minimum amount of money you would accept for work?
8. Where/how do women find out about job opportunities?
9. What sort of educational opportunities, vocational training, or job experience do you normally get? *Prompt: if response is none, ask what are the job opportunities they think are suitable for refugee women?*

Market and Job Opportunity Knowledge

10. Is there a difference in the types of work you do versus the kind of work other communities do? *[For example, do (refugees, women, youth, etc.) work more in some sectors over others?]*
11. In your community, are there differences in the types of work appropriate for women and appropriate for men? *[For example, women expected to work from home; women are expected to work part-time outside of the home to keep up with childcare responsibilities; women feel unsafe working a night shift or in certain neighborhoods]*
12. Do you think the business environment in Turkey is available/supportive for you and your female relatives?

13. What types of businesses do you know in this community that are most successful? *Prompt the group for examples of male and female run businesses.*
14. What are some reasons these businesses are especially successful? *(Try to elicit at least 5 reasons from the group.)*
15. What are some skills that these successful business owners possess that others may not? *(Try to elicit at least 5 skills from the group.)*

Group's Work-Related Interests, Challenges and Needs

16. What kind of work would you or other women would be interested in doing, and why?
17. What are the most important qualities, skills, or assets that women need to get jobs or start businesses? *(Prompt: Are there any factors – age, family – that would make it easier for some to find employment than others?)*
18. What are the biggest obstacles to you for finding employment or starting a business? *(e.g. resources, connections, training, transportation, financing, equipment, community acceptance, child care, etc.)?*
19. How can you develop the skills you need to find a job or start a business? What makes it difficult to learn these skills?
20. If vocational activities were offered to you, what are the obstacles that might prevent you from attending the vocational activities and other activities? *Prompt: How long would you be willing to travel daily for vocational activities and what is an appropriate location to host the activities?*
21. What would be the most ideal times for your attendance?
22. Do you think of going back to Syria or migrate to another country? Do you think your experiences in Turkey may help in the case of leaving to another country?
23. Is there anything else you'd like to share?

Conclusion: Thank the participants for their time and lively discussion. Remind them that their comments will remain anonymous and if they have additional information, they can come share it with you in person.

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

KEY INFORMANT INTERVIEWS QUESTIONS WITH ACTION SECTOR ASSOCIATIONS

Introduction

The role of an interview guide is to direct the interviewer's efforts throughout the dialogue. This is a sample guide and includes the kind of information that you may want to acquire during your in-depth interviews/KIIs.

I. GENERAL INFORMATION

Name of person (or persons) interviewed and position:

Name of Enterprise / Organization:

Ownership Type (Public, Private, or Other to specify):

Year operations began:

Total value of operations in local currency:

Location of operations:

Vision/Mission:

Introduction:

- Thank respondent for meeting; introduce yourself and the team; briefly explain the project, goals, and how the respondent fits in
- Explain why the respondent was chosen, emphasizing sector expertise if organization is sector-specific
- Explain that their answers are confidential; you are taking notes to later remember what was said. Information will be aggregated.
- Generate rapport – ask about the organization's operations, and what types of businesses it supports

<p>1. Growth Sectors and Hypothesis test for some sectors</p> <p>What are strong and growing sectors in this region?</p>	<p>1.1. Which sectors in Istanbul are strong and growing? 1.2. How likely are these popular sectors to hire young people in the short or long term? Would it be same for youth refugee females or do you think the sectors change? 1.3. The studies we have conducted before indicate that particularly for entry level jobs sectors such as textile and clothing, health and social services, retail and wholesale, food and beverage, construction, education, accommodation, manufacturing of rubber and plastic are the most promising sectors among the others. Would you please share your ideas about this issue? 1.4. If you reevaluate these sectors in terms of convenience for refugee youth females as most suitable and potential ones, which sectors differs/come to the forefront? 1.5. What kind of advantages and contributions do you think women may have in the growing sectors? Which features should they improve in themselves to increase their contribution and opportunities to be recruited?</p>
<p>2. Wage Employment Opportunities Suited for Youth</p> <p>What are main employment opportunities for youth in these sectors? (mainly formal sector but also in SME/informal sector)</p>	<p>2.1. What are the main entry level job opportunities in these sectors? 2.2. What is present and forecasted demand for young labour in these sectors? 2.3. What are current wages? What are future prospects? How does this compare throughout this sector? 2.4. What is the general or average job quality (pay, benefits, working conditions, and degree of formality of businesses etc.) in these sectors? Do these numbers change for young women? If so what are they? 2.5. Are there any jobs for which youth/refugees would be particularly suited? If so, what are they? Why? 2.6. Are there any jobs that would be particularly well suited to young women?</p>
<p>3. Entrepreneurship opportunities Suited for Youth/Refugees</p> <p>What are the main</p>	<p>3.1. Do you think there are any entrepreneurship opportunity for youth and particularly refugees? Would you evaluate for youth women? 3.2. Are there any other sectors that may be likely to be suitable for youth/refugees?</p>

<p>business opportunities for youth in these sectors? (mainly informal sector but also SME/formal sector)</p>	<p>3.3. What are the biggest obstacles for the creation of youth and women run small businesses? 3.4. What specific skills are necessary for female youths to start small businesses in these sectors? 3.5. Are any specific educational qualifications required for creation of small business in these sectors? What are they? 3.6. What is the general or average structure of operating a business in these sectors (i.e. start-up cost, fixed/variable cost, profit margin, revenue, how long until the business start may generate positive returns)?</p>
<p>4. Government Support What support is available by government?</p>	<p>4.1. Are there any governmental programs, policies, or regulations, subsidies, funds or grants supporting refugees and particularly small and medium enterprises? 4.2. What are the biggest obstacles in programs, policies and regulations for the growth of these sectors? Please explain. 4.3. What are the biggest obstacles in state programs, policies and regulations for the growth of women workforce and entrepreneurship? Please explain what types of programs state should have to support these opportunities? 4.4 Does the government provide any formal or informal labour market exchange systems to help young people hear of and obtain jobs? Is there any women specific policy in this area, -if not- should there be?</p>
<p>5. Potential Employers Who are the potential employers in these sectors?</p>	<p>5.1 Who are the most important or largest firms or market actors in these sectors? List top five that you are aware of. 5.2 What firms, if any, demonstrate interest in providing job opportunities to trained youth? 5.3 What firms, if any, demonstrate an interest in providing opportunities to young women? 5.4 What firms, if any, have existing partnerships with training providers or other institutions to hire required labour/staff 5.5 What firms, if any, may be interested in (partnering with Save/local TVET's/NGO partners) workforce development activities for incumbent and future employees? Why / Why not? 5.6 What are the gaps and challenges faced by potential employers in identifying and retaining quality employees, especially youth? 5.7 How do market actors in these sectors perceive youth? How do they perceive young women? Are there any particularly negative perceptions? Any particularly positive perceptions?</p>

<p>6. Potential Training Partners</p> <p>Who are the important business and entrepreneurship training providers?</p>	<p>6.1 What are the most capable public and private sector workforce education and training institutions in these sectors? Name top 5.</p> <ul style="list-style-type: none"> - What kinds of services do they provide? - Do they have specific programming directed at young women? <p>6.2 What are the most capable public and private sector institutions supporting entrepreneurship and market linkages (e.g. business service providers, incubators, financial institutions, entrepreneurship programs, universities, etc.) in these sectors?</p> <ul style="list-style-type: none"> - What kinds of services do they provide? <p>Are potential female entrepreneurs affected in different ways than men?</p>
<p>7. Durable Solutions</p>	<p>7.1. Do you think the knowledge gained through the sectors / occupations may contribute to Syrian women in case their return to Syria country?</p>
<p>Conclude the Interview:</p>	<ul style="list-style-type: none"> • Thank the respondent for his/her time and contributions • Explain what will happen with this information, emphasizing how the information will contribute to the project • Ask for any final comments related to the interview • Have some time for informal conversation and say good-bye

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

KEY INFORMANT INTERVIEWS/ IN-DEPTH INTERVIEW QUESTIONS WITH VOCATIONAL SCHOOLS

Introduction

The role of an interview guide is to direct the interviewer's efforts throughout the dialogue. This is a sample guide and includes the kind of information that you may want to acquire during your in-depth interviews? Remember that during in-depth interviews (with vocational schools), your goals are **to benefit from their expertise regarding vocational training (challenges, opportunities, etc.), and determine whether the interviewee's organization may represent a good potential partner.**

I. GENERAL INFORMATION

Name of person (or persons) interviewed and position:

Name of Enterprise / Organization:

Ownership Type (Public, Private, or Other to specify):

Year operations began:

Total value of operations in local currency:

Location of operations:

Vision/Mission:

II. SERVICES OFFERED

1. What types of services are provided?

- Training
- Technical assistance
- Others; Please specify: _____

2. What is the area of focus of your services?

- Business skills
- Entrepreneurship skills
- Others; Please specify: _____

3. If training is provided, what are the main topics addressed in the curriculum?

Business skills (please specify topics)	
Entrepreneurship skills (please specify topics)	
Others (please specify topics)	

4. For each topic/course, please list the length/frequency, cost, average course size (number of trainees), and completion rate below.

Topic/Course	Length/Frequency	Cost	Average course size (number of trainees)	Completion rate

5. Are your courses certified or recognized by professional groups, governments, etc.? Is your certificate internationally recognized? (In Syria or other countries)

6. How is training delivered (methods, materials)?

7. How are trainers trained, i.e. what is their background, do they have any educational or experience requirements?

8. Do you provide training at the client organization’s facilities or your own? What are the facilities like?

9. Is the curriculum an established one, or is it adapted to the needs of the client group? Are there special needs for females? How often do you update your curriculum?

10. Is there a certificate of completion?

11. How is “successful” completion of training measured? By private sector buyers or employers or other organizations?

12. What additional services (counselling, placement, etc.) do you provide?

13. If you offer placement services, what is the process of linking graduates of the programs to potential employers? (Continue to Q14) If you do not offer, what is the reason? (Continue to Q15)

14. For each topic/course, please list the placement rates, barriers to placements, and types of places where students are being placed below. Please also specify all these issues for women.

Topic/Course	Placement rate	Types of places where students are being placed	Barriers to placements

15. Is there demand particularly from women youth for training which you are currently not providing? If so what kinds of training?

16. Any study showing graduates enjoy higher employment opportunity than non-graduate peers?

17. What feedback have you gotten from employers regarding your graduates? What do you think was the root cause behind any positive or negative feedback? What can be done to address the negative feedback?

III. TARGET SERVICE USERS

18. What types of clients does your organization provide services to (adults, youth)?

- Adults
- Youth
- Women

19. What are the ages of your clients? (youth from ___ to ___, adults from ___ to ___).

20. What is the percentage of males (____), females (____)?

21. What are the requirements for entering and participating in training?

22. What is the process for linking graduates of the programs to potential employers?

IV. COST STRUCTURE

23. Is the service provided for free? If so, how can you ensure sustainability of programs?

24. Does the client pay for the service? If so, how much is paid (cost for trainee)?

25. What is the frequency of payments?

26. How is the payment made (cash, credit, scholarship, other)?

V. MARKETING AND PARTNERSHIPS

27. How do you advertise your services (media, through NGOs or donors, through enterprise or trade groups, word-of-mouth)?
28. Do you have existing contracts/linkages with market actors for placement of program graduates?
29. Do government organizations, donors, or NGOs approach your organization to provide training to their program clients?
30. Do you have partners for which you fulfil the training role?
31. Do you know any current government programs and funds available in support of training opportunities? If so, has your organization benefited from these programs/funds?
32. Is training given in partnership with micro finance institutions?

VI. CONSTRAINTS

33. What is your training capacity, i.e. how many people per course? How many trainers do you have available at any one time?
34. If training is not in client organization's facilities, is it a problem for youth to travel to facilities?
35. Is the facility large enough? Comfortable?
36. Is there any difficulty "getting the word out" about your services?
37. What other constraints do you face in terms of delivering services?
38. What support would be needed to address these constraints? (Moderator should record each constraint given and the specific kind of support the respondent indicates is needed to address it.)
39. Can you provide training in Arabic?
40. Can you provide training through interpreters?

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL
KEY INFORMANT INTERVIEWS WITH WOMEN'S ASSOCIATIONS / REFUGEE FOCUSED ASSOCIATIONS

I. GENERAL INFORMATION

Name of person (or persons) interviewed and position:

Name of Enterprise / Organization:

Ownership Type (Public, Private, or Other to specify):

Year operations began:

Total value of operations in local currency:

Location of operations:

Vision/Mission:

- 1) Would you please inform us about the sectors and occupations youth mostly are hired in Turkey?
- 2) Would you please inform us about the sectors and occupations women mostly are hired in Turkey? What differs and how?
- 3) Are you working with refugee women? For what reasons they mostly come to you or you contact with them?
- 4) Would you please inform us about the sectors women refugees mostly are hired in Turkey?
- 5) The studies we have conducted before indicate that particularly for entry level jobs sectors such as textile and clothing, health and social services, retail and wholesale, food and beverage, construction, education, accommodation, manufacturing of rubber and plastic are the most promising sectors among the others. Would you please share your ideas about this issue?
- 6) If you reevaluate these sectors in terms of convenience for refugee youth females as most suitable and potential ones, which sectors differs/come to the forefront?
- 7) What are the main obstacles youth refugees mostly deal with in the process of entering a job/job market?
- 8) Which skills do you think may contribute to youth refugee females' employment opportunities?
- 9) What type of areas do you think refugees should be educated to be employed in these potential sectors?
- 10) What do you think about the entrepreneurship capacities of youth refugee women?
- 11) What are the advises you'd give to youth refugee to increase their employability and entrepreneurship capacities?
- 12) Are you knowledgeable about the important programmes, policies, funds, grants, subsidies and regulations provided by the state for refugees? Would you please explain?
- 13) Which companies -if any? - do you think may be interested in providing job opportunities for refugees? Why?
- 14) What do you think about employed youth refugee women's relations in workplace with Turkish citizens?
- 15) In an effort to balance their family-children-working life in what areas Syrian refugee women and Turkish women have commonalities and differences?
- 16) Do you think, in the case repatriation, refugees would be able to use their experience / education gained in Turkey?

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL
KEY INFORMANT INTERVIEWS WITH JOB AGENTS

I. General Information:

Name of person (or persons) interviewed and position:

Name of Enterprise / Organization:

Ownership Type (Public, Private, or Other to specify):

Year operations began:

Total value of operations in local currency:

Location of operations:

Vision/Mission:

- 1) In terms of hiring opportunities which sectors and occupations do you think have been growing in Istanbul?
(Promising sectors in terms of new recruitment opportunities. Would you please put them in an order?)
- 2) In terms of hiring opportunities which sectors and occupations do you think have been declining?
- 3) As we mostly focus on unemployed female youth do you think these sectors are same or different for entry level job positions? If any would you explain these differences in sectors and positions.
- 4) For the project we mainly focus on Syrian refugee youth and particularly females. Given this do you think these sectors change for entry level positions? If yes, which sectors do you think may be included or excluded from the list? (any affect of language barrier?)
- 5) Are you knowledgeable about the important programmes, policies, funds, grants and regulations provided by the state for refugee females? Would you please explain?
- 6) Which companies -if any?- do you think may be interested in providing job opportunities for refugee females ? Why?
- 7) The studies we have conducted before indicate that particularly for entry level jobs sectors such as textile and clothing, health and social services, retail and wholesale, food and beverage, construction, education, accommodation, manufacturing of rubber and plastic are the most promising sectors among the others. Would you please share your ideas about this issue?
- 8) If you reevaluate these sectors in terms of convenience for refugee youth refugee as most suitable and potential ones, which sectors differs/come to the forefront?
- 9) What barriers do you think youth refugees encounter in Turkish job markets? And which advantages and disadvantages do employers have in hiring refugees?
- 10) To benefit from employment opportunities which skills do you think youth refugees should improve?
- 11) What type of areas do you think refugees should be education to be employed in these potential sectors?
- 12) In terms of occupations, are there leading sectors with the potential of job creation? (For instance, an accountant may have multisector/cross cutting sector opportunities)
- 13) Do you have other advises for employability and social cohesion of refugees?

GENDER SENSITIVE LABOUR MARKET ASSESSMENT IN ISTANBUL

KEY INFORMANT INTERVIEWS WITH COMPANIES

I. General Information:

Name of person (or persons) interviewed and position:

Name of Enterprise / Organization:

Ownership Type (Public, Private, or Other to specify):

Year operations began:

Total value of operations in local currency:

Location of operations:

Vision/Mission:

1. Our research has led us to believe that your industry would be an appropriate destination for workers because we anticipate growth, job availability and suitability to the target group etc. How do you feel about these conclusions?
2. How do you feel about potential challenges or opportunities in your industry?
3. What are the positions suitable for refugees in your sector? And what type of tasks are expected for these positions? (includes both males and females)
4. Do you think that there are any particular niches or players in your industry that may be appropriate / inappropriate for youth (Syrian and local)?
5. What type of technical skills are expected for these occupations?
6. What type of soft skills are expected for these occupations?
7. What type of language skills are expected for these occupations?
8. What is the minimum educational level you expect for these positions?
9. What do you think about the average salary for these positions?
10. What type of a working environment is possible for these positions? (Ask for women as well)
11. How do you feel about the job prospects in your industry for workers in general? (For young women? For Syrians and refugees?)
12. How do you feel about the capabilities of youngest workers? What training / skills would help them?
13. Do you think refugees in your sector encounter specific problems in work environment such as discrimination, exploitation or abuse? (includes both males and females)
14. How do you feel about the current vocational training industry?
15. What type of micro enterprise opportunities are available in your industry for youth? What are the skills you advise for refugees to be an entrepreneur in your sector?
16. Can you think of anything else which you think that it might be important for us to know?
17. Are there any other points you would like to add?