Save the Children

ingev/ İNSANİ GELİŞME VAKFI

Research Update Note on the 2019 Gender-sensitive Labor Market Assessment for Istanbul

April 2021

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*** NOTE:**

All statements given in quotation marks in SECTION 4 indicate direct references to the interview respondents who participated in the focus group discussions or key informant interviews.

SECTION 1: BACKGROUND

The social, economic, and political consequences of the COVID-19 epidemic have brought about profound change at both the macro- and micro-economic levels. Inequality has deepened and poverty has been experienced in an almost brutal manner, especially by disadvantaged groups who were already economically vulnerable even before the pandemic started. In this process, many low-income workers have lost their jobs and fell into poverty.

According to Eurostat data[1], since the Covid-19 epidemic started, the rate of job loss and dismissal for low-income (mainly temporary and low-skilled) workers is higher than middle-income people, while the rates for those in the middle-income group are higher than those in the higher-income group. The risk of a worker losing their job is higher in the hospitality and food sectors in comparison to others.

Covid-19 in Turkey

The situation in Turkey bears similar characteristics to the world in general. After the official announcement of the first pandemic case in Turkey ensuing the declaration of COVID-19 as a pandemic by the World Health Organization on March 11, 2020, a series of measures such as full curfews for certain age groups and general curfew restrictions on weekends were taken. These strictest measures lasted over the period spanning the spring of 2020. Many sectors have searched for alternative working methods, particularly turning to remote working. Schools were closed and switched to distance education, and other service areas such as shopping centers, restaurants, hairdressers, beauty salons, gymnasiums were closed throughout this period.

May and June 2020 saw the start of government-mandated renormalization in Turkey and easing of restrictions. The measures were loosened or tightened over time according to the course of the disease to prevent an excessive burden on the healthcare system[2]. The normalization process started with the permission given to shopping centers and hairdressers to reopen on May 11, 2020 and continue their operations within the framework of the Covid-19 rules. As of June 1, 2020, the process expanded to include other sectors whose activities were temporarily suspended[3].

Syrians in Turkey during Covid-19

During the COVID-19 period, Syrians under temporary protection (SuTP) in Turkey have been one of the most disadvantaged groups due to their economic conditions. As those in employment mostly had informal jobs, it was relatively easy for employers to lay them off. Syrian and local unregistered employees are not included in the social security system and

[1] COVID-19 labour effects across the income distribution, 27/10/2020, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20201027-2 ; Jobs and economy during the coronavirus pandemic, https://ec.europa.eu/info/live-work-travel-eu/coronavirus-response/jobs-and-economy-during-coronavirus-pandemic_en ; Impact of Covid-19 crisis on services, March 2021, https://ec.europa.eu/eurostat/statistics-explained/index.php/Impact_of_Covid-19_crisis_on_services

[2] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market?, pg.1 https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)

[3] Ibid

tend to get work in low-qualification jobs. Unregistered employees also couldn't benefit from the support programs provided by the Turkish Government to address the adverse economic effects of the pandemic.

Covid-19 and Economic Empowerment of Women

Women have been one the main segments of the population who were adversely affected from the economic losses brought on by the pandemic. Globally, men are twice as likely as women to have full time jobs[4]. Women's labor force participation is as low as 25 percent in the Middle East and North Africa[5]. Women's employment in Turkey[6], mainly in accommodation, food, tourism, children, elderly care have been negatively affected by the Covid-19 outbreak. In addition to income losses, increasing basic food prices and transportation costs have also put a burden on the deepening poverty of the poor and economically vulnerable. Within the scope of the Covid-19 pandemic, the number of people benefiting from the short-time work allowance in Turkey approached 3.8 million by March 2021 while cash wage support was provided to 2.5 million people[7].

Business Trends during Covid-19: Need for Higher Digitalization in Supply Chains

In an analysis published by The Economist Intelligence Unit[8] (EIU) that examines the sectoral expectations in 2021, it is predicted that almost no industry—from automotive to retail, energy, tourism, and entertainment—will reach pre-pandemic levels with respect to their turnover in 2021. Many authorities point out that health infrastructures and vaccination programs have to improve all over the world to leave the pandemic behind[9].

Even if the COVID-19 vaccination becomes widespread, trends such as remote work and online shopping are expected to remain strong, as physical distancing measures will continue to be maintained until widespread immunity is reached[10]. In the EIU analysis, health and information technologies are predicted to be the sectors that will have the best year in 2021. On the other hand, 2021 will continue to be a difficult year for tourism and automotive sectors.

Online shopping trends seem to be permanently ingrained due to the pandemic period. There is a deep shift ongoing from physical locations to online platforms in the retail and entertainment industries. According to a research conducted by Deloitte Turkey[11] in the early months of pandemic with the participation of 314 senior executives from nine sectors, several sectors such as tourism, hospitality, construction, real estate, and industrial manufacturing, were predicted to have a contraction of more than 20 percent for 2020. Decreased mobility and breaking down of international supply chains during the pandemic were among the

[4] World Bank, Gender at Work, pg.2, https://www.worldbank.org/content/dam/Worldbank/document/Gender/GenderAtWork_web.pdf (Last Accessed: April 18th, 2021)
[5] Ibid
[6] ISKUR Bulletin (in Turkish), https://media.iskur.gov.tr/44853/i-s-kur-bulten-101-sayi.pdf, p.4, (Last Accessed: April 18th, 2021)
[7] Ibid
[8] The Economist Intelligence Unit, Excerpt from Dunya Newspaper, "10 Business Trends for 2021" (in Turkish) https://www.dunya.com/ekonomi/2021-yili-icin-10-is-trendi-haberi-604314 (Last Accessed: April 23rd, 2021)
[9] Ibid
[10] Ibid
[11] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html

underlying reasons for such bleak assessments. For instance, 95% of the respondents from the retailing sector assessed the impact of supply problems in operations as high.

On the other hand, technology, media, and telecommunications sectors were expected a grow close to 10 percent. Findings suggest that only a small number of firms in Turkey were found to be successful in being prepared for such a crisis or and reacting fast to changing circumstances. According to the research, the main reasons for this are the limited use of digital technology and insufficient competency of the workforce. Also, in connection to this, firms with relatively smaller size or turnovers are thought to be in a much riskier position in terms of their financial standing[12].

Deloitte's research shows that executives in different sectors generally thought that the potential impact of the pandemic was underestimated in the first quarter of 2020. As a result, the response was rather slow at the beginning of the pandemic. This led to serious supply chain problems. Yet, interviewed executives still expected growth in the next 5 years as operational visibility into the supply chains are expected to increase due to the higher utilization of digital tools[13]. According to the research, the worst problem defined by the firms was uncertainty in demand forecasting. This in turn puts greater emphasis on the information and communication technologies sector. For instance, 85% admitted not leveraging the effectiveness of digital technologies. These should be a focus area on operational planning in near future[14].

Study Objective: Based on such unexpected and deep economic changes brought about by the pandemic, Save the Children decided to update the 2019 Gender Sensitive Labor Market Assessment for Istanbul[15] conducted by INGEV. Access of Syrian and vulnerable host community youth to the labor market and business opportunities in Istanbul were re-examined in light of the shifts generated by the pandemic. This updated study was conducted between February-April 2021.

Objectives of this research note are to re-visit the findings of the 2019 Labor Market Assessment and re-analyze as well as update the following under the effects of the Covid-19 pandemic:

- **(i)** the leading sectors in terms of employment and entrepreneurship opportunities during the COVID-19 period for economically vulnerable young people in Istanbul.
- **(ii)** skills expected from employees by the employers in these sectors.
- **(iii)** promising job opportunities for the Syrian youth living in Istanbul.
- **(iv)** Circumstances of women and men from a gender perspective in accessing employment and entrepreneurship opportunities.

[12] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html
[13] Ibid
[14] Ibid
[15] Save the Children, INGEV- 2019- Gender-Sensitive Labor Market Assessment in Istanbul - https://ingev.org/raporlar/SaveTheChildrenGenderSensiteveLMA.pdf (Last Accessed: April 21st, 2021)

SECTION 2: METHODOLOGY

The study consisted of a review of recent studies related to Covid-19's effects on the Turkish Economy and Syrians in Turkey as well as key informant interviews (KII) and focus group discussions (FGD) with professionals from different sectors.

Key informant interviews were conducted with representatives from private sector companies and major sectoral associations operating in the sectors that displayed the highest potential for employment and entrepreneurship of Syrians in Istanbul based on the results of the 2019 Labor Market Assessment.

One key finding from the 2019 Labor Market Assessment[16] was that Syrian-owned enterprises were quite important in providing employment pathways for the Syrians in Turkey. Thus, in addition to key informant interviews, four focus group interviews with Syrian entrepreneurs were organized to understand the effects of the pandemic period on the Syrian community in Istanbul. Three to five Syrian entrepreneurs participated in each focus group. Of the total of 16 entrepreneurs who took part, 3 were female entrepreneurs.

During these interviews and group discussions, the participants were asked to evaluate the impact of Covid-19 on their sectors. In addition, positions which lost their importance or started to stand out due to the pandemic conditions as well as the competencies required for these jobs were investigated. Pandemic's effects on women's access to livelihood opportunities were discussed in detail with interviewees.

The final section of this note (Section 5) updates the recommendations of the main report in 2019, namely, "Gender-Sensitive Labor Market Assessment in Istanbul."[17]

The breakdown of the KIIs, focus group discussion and workshop are listed below:

Key Informant Interview Respondent List:

Agency/ Organization/ Institution:	
1.	CATEGORY MERCHANDISERS ASSOCIATION
2.	FOOD RETAILERS' ASSOCIATION
3.	OUT OF HOME CONSUMPTION PRODUCTS ASSOCIATION
4.	FASHION AND APPAREL FEDERATION OF TURKEY
5.	MIGROS WHOLESALE
6.	GLOBELINK
7.	TÜRK TELEKOM
8.	ISTANBUL CHAMBER OF REAL ESTATE BROKERS
9.	TURKEY MEDICAL TOURISM ASSOCIATION FEDERATION (TURSAF)

[16] Save the Children, INGEV- 2019- Gender-Sensitive Labor Market Assessment in Istanbul - https://ingev.org/raporlar/SaveTheChildrenGenderSensiteveLMA.pdf (Last Accessed: April 21st, 2021)
[17] Save the Children, INGEV- 2019- Gender-Sensitive Labor Market Assessment in Istanbul - https://ingev.org/raporlar/SaveTheChildrenGenderSensiteveLMA.pdf (Last Accessed: April 21st, 2021)

FGDs Participant List:

Number	Sector	Company
1.	ICT	YARIN AJANS
2.	TEXTILES	ŞIFONLA
3.	ICT (E-MARKETING)	ONE ONLY
4.	HEALTHCARE (TOURISM)	CUREISTA

Number	Sector	Company
5.	FOOD PROD.	ALOLABI
6.	FOOD PROD.	NAFS SAMI
7.	FOOD PROD.	YASILILK
8.	HEALTHCARE (TOURISM)	ALNOUR

Number	Sector	Company
9.	HEALTHCARE	VENUS CLINIC
10.	HOSPITALITY	ALMUALIM
11.	WHOLESALE/RETAIL	DADO STYLE

Number	Sector	Company
12.	TEXTILES	GOLDEN CROWNS
13.	HEALTHCARE	DEVA
14.	LOGISTICS	ZUMURAUDA
15.	REAL ESTATE	INHOUSE GLOBAL
16.	ICT (E-MARKETING)	ALPHA

SECTION 3: EFFECTS OF COVID-19 ON THE ECONOMY AND DISADVANTAGED COMMUNITIES

Before moving on to a sector-by-sector summary of the pandemic's effects in the next section, this section outlines main economic outcomes of the Covid-19 period on Turkey's economy (with the pandemic still ongoing as of the date of this note).

1. The pandemic caused significant losses to Turkey's economic output.

A report[18] by International Labour Organization (ILO) investigating the impact of the pandemic on work hours in Turkey concluded the following:

- The pandemic reduced the weekly hours worked in Turkey from 1,242 million to 808 million in April 2020, and from 1,250 million to 828 million in May 2020.
  - This indicates weekly losses of 434 million and 422 million hours, respectively.
  - Because government-mandated pandemic measures made it almost impossible for companies to lay off staff, the losses in hours worked became an ever more important indicator of the pandemic's effects on employment. Tracking pandemic's effects on employment is much harder to carry out by analyzing the monthly changes in employment statistics.

- In April and May of 2020, pandemic destroyed one-third of the economic activities in Turkey.
  - The reasons for this are: decrease in the employment level, excessive downtime at work due to nonattendance, and additional decreases in hours worked for those at work.
  - In the first phase of the global pandemic, nonattendance and fewer working hours accounted for more than two-thirds of this impact.

- The pandemic caused a 30.3% decrease in hours worked in Turkey during the second quarter of 2020.
  - This rate dropped to 9.1% in the third quarter, which signified a **faster** recovery in this area than expected.

A June 2020 survey by TEPAV[19] involving surveys with 1301 Syrian and 1732 local community employees found that:

- 51.8% of employees from Istanbul stated that their income went down due to the pandemic.

[18] ILO Turkey, Jan'21, "Beyond unemployment: The impact of the pandemic on hours worked in Turkey", https://www.ilo.org/ankara/areas-of-work/covid-19/WCMS_766572/lang--en/index.htm (Last Accessed: April 20th, 2021)
[19] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)

2. Syrian-owned Enterprises were affected more negatively by the pandemic compared to local ones.

According to an INGEV Research Study[20] in June 2020 about the effects of Covid-19 on Syrian- and host-community owned small- and medium-sized enterprises (SMEs) in Turkey:

- 86% of refugee entrepreneurs and 68% of local entrepreneurs stated that the pandemic affected their business.
    - Crucially, 54% of refugee entrepreneurs and 34% of local entrepreneurs had their monthly turnover **fell by more than 50%** in April and May 2020.

RAND Europe[21], in an online survey conducted in May 2020 with a sample heavily focusing on refugee and migrant entrepreneurs in Turkey, found that 61% of respondents thought their companies would not last more than 4 months. 85% cited they would not last more than a year.

According to INGEV Entrepreneurship Support Center database of Syrian-owned enterprises in Istanbul, there were 2,624 new enterprises with at least one Syrian owner or partner registered in the city in 2018. The corresponding figure for 2019 was 2,066, while it went down to 1,117 in 2020.

- **The figure in 2020 represents a 57% decrease from the total number in 2018 and a 46% decrease from the one in 2019.**

A Building Markets survey[22] published in January 2021, with a sample of Syrian-owned SMEs that's skewed towards the wholesale and retail sector, found that:

- 57% of SMEs were uncertain how long they could continue to operate under pandemic conditions.
- 77% of SMEs have experienced a decrease in the number of clients since March 2020, and only 6% have had an increase.
- 63% of SME owners had to rely on their savings to cover their living expenses.

[20] INGEV, Understanding Local and Refugee Entrepreneurs for Normalization https://ingev.org/reports/Understanding_Local_and_Refugee_Entrepreneurs_for_Normalization_One_Pager_10_06_2020.pdf (Last Accessed: April 19th, 2021)
[21] RAND Europe, How small businesses are coping with the impact of COVID-19, July 2020.; https://www.rand.org/pubs/research_reports/RRA607-1.html (Last Accessed: April 21st, 2021)
[22] Building Markets Turkey COVID-19 SME Assessment, https://buildingmarkets.org/sites/default/files/pdm_reports/building_markets_turkey_covid-19_assessment_210105_compressed.pdf (Last Accessed: April 20th, 2021)

3. Syrian-owned enterprises had limited access to aid programs.

Findings from the INGEV June 2020 study[23] show that:

- 92% of local entrepreneurs were aware of at least one support or aid program enacted the address the adverse economic effects of Covid-19. This rate was only 41% for Syrian entrepreneurs.
- 81% of local entrepreneurs stated that they benefitted from at least one support program compared to only 28% of Syrian entrepreneurs.

4. Syrian-owned enterprises needed support with the digitalization of their businesses.

Findings from the INGEV June 2020 study[24] further indicate that:

- 64% of local entrepreneurs and 33% of Syrian entrepreneurs stated that they were able to run their business online before COVID-19 period.
- 50% of Syrian-owned SMEs indicated that they would welcome consultancy services on digitalization of their business as opposed to only 19% of host community SMEs.
    - 93% of Syrian-owned SMEs also said they would need financial support for digitalization.

5. Pandemic had a significant negative effect on the employment level of Syrians in Turkey.

A research study[25] in April 2020 by Relief International found that:

- 87% of Syrian refugees have someone in their household who lost their job because of the pandemic.
- 71% said that they couldn't access health services.
- 81% reported urgent unmet needs (most likely as result of having lost their job).

[23] INGEV, Understanding Local and Refugee Entrepreneurs for Normalization https://ingev.org/reports/Understanding_Local_and_Refugee_Entrepreneurs_for_Normalization_One_Pager_10_06_2020.pdf (Last Accessed: April 19th, 2021)
[24] INGEV, Understanding Local and Refugee Entrepreneurs for Normalization https://ingev.org/reports/Understanding_Local_and_Refugee_Entrepreneurs_for_Normalization_One_Pager_10_06_2020.pdf (Last Accessed: April 19th, 2021)
[25] Relief International, Impact of the COVID-19 Outbreak on Syrian Refugees in Turkey: Results from Rapid Needs Assessment conducted in Istanbul, Izmir, Manisa, Gaziantep, Kilis and Reyhanli, April 2020, https://reliefweb.int/report/turkey/impact-covid-19-outbreak-syrian-refugees-turkey-results-rapid-needs-assessment (Last Accessed: April 19th, 2021)

Research by TEPAV[26] showed that:

- 45% of previously employed Syrians under temporary protection were laid off, had to close their business or take unpaid leave during the first three months of the pandemic. This rate was 15% for Turkish citizens.

- 88% of Syrians against 50% of Turkish citizens have suffered a loss of income during that period.

6. Women were affected more negatively than men.

Research by TEPAV[27] on the initial pandemic period between March and May 2020 showed that:

- Overall, 46% of women versus 27% of men were laid off, had to close their business, or take unpaid leave.
- 32% of the overall sample stated that the pandemic did not cause any changes to their work status and they continue to work as they did prior to the pandemic, either full-time or part-time.
    - However, the study found that the rate of women without any changes to their working status was only 7.4%.

Findings from ILO research[28] indicate that:

- The loss of working time for men decreased from 8.3% to 7.2% in the period from August to September 2020 whereas the working time loss for women increased from 10.9% to 11.3% in the same period.

- Women have lost more jobs in proportion to men, and they have been more affected by regulations related to unpaid leave throughout the pandemic period.
    - The fact that women experienced more losses in employment is likely due to the fact that their employment is concentrated in the accommodation and care sectors.

- During the pandemic, many families have had to educate their children and take on the role of teachers without much outside support.
    - The research report also notes that in Turkey, women are disproportionately likelier to be responsible for housework in comparison to men.

7. Young people were among the hardest hit by the pandemic.

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[26] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)
[27] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)
[28] ILO Turkey, Jan'21, "Beyond unemployment: The impact of the pandemic on hours worked in Turkey", https://www.ilo.org/ankara/areas-of-work/covid-19/WCMS_766572/lang--en/index.htm (Last Accessed: April 20th, 2021)

The ILO research[29] shows that:

- Young people in Turkey (15-24) were among the most affected groups with employment losses exceeding 20% in April and May 2020.

- When young people in Turkey are not in education, employment, or training ("NEET"), their probability of getting out of this situation is 50.6% for men and **23.5% for women**.

8. Less qualified and/or unregistered employees were more negatively affected.

The ILO research[30] further indicates that:

- Informal employment displayed a higher rate of job loss in comparison to formal employment.

- The **hospitality sector** was one of the worst-affected sectors during the pandemic.
    - The relatively high share of informal work in bars, restaurants and hotels should also be factored in when considering the magnitude of the downturn in this sector.
    - The loss of informal employment means that some of the most vulnerable families may be at an even greater risk of exclusion.

The TEPAV survey from June 2020[31] concluded:

- Employees with a Vocational Qualification Certificate (given by the Vocational Qualifications Authority of Turkey[32] - "MYK") were less likely to report a decrease in their income due to the pandemic:
    - Only 46.5% of certified employees stating their income went down compared to 73% of non-certified employees.

[29] ILO Turkey, Jan'21, "Beyond unemployment: The impact of the pandemic on hours worked in Turkey", https://www.ilo.org/ankara/areas-of-work/covid-19/WCMS_766572/lang--en/index.htm (Last Accessed: April 20th, 2021)
[30] ILO Turkey, Jan'21, "Beyond unemployment: The impact of the pandemic on hours worked in Turkey", https://www.ilo.org/ankara/areas-of-work/covid-19/WCMS_766572/lang--en/index.htm (Last Accessed: April 20th, 2021)
[31] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)
[32] Mesleki Yeterlilik Kurumu- Vocational Qualifications Authority: https://www.myk.gov.tr/index.php/en/about-vqa/history (Last Accessed: April 21st, 2021)

9. The pandemic has affected different business sectors in varying degrees.

Turkish Statistical Institute's ("TURKSTAT") turnover indices[33] track the revenue levels of different business sectors. Year-on-year changes in the monthly indices indicate the status of the sectors compared to the same month of the previous year. Current indicators show that some sectors underwent consistent negative changes in their indices throughout the pandemic period while others initially posted drops but bounced back as the strictest lock-down measures subsided. There were still others that almost consistently grew compared to the year before.

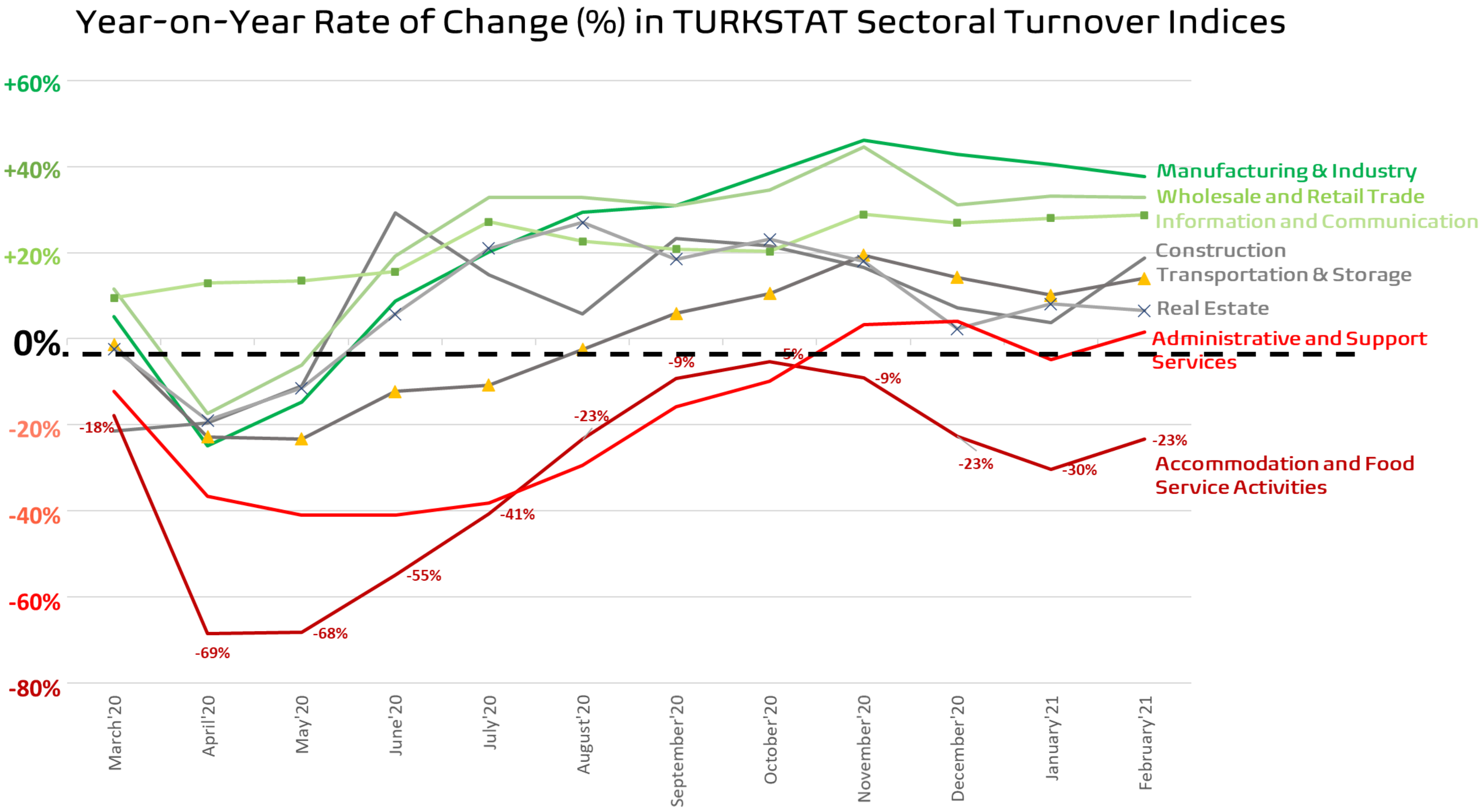
March 2020 to February 2021: A Year Under the Pandemic

Annual Rate of Change (%) in TURKSTAT Sectoral Turnover Indices	Pandemic Declared: March'20	Lock-Down: April-May'20	Renormalization Begins: June- July'20	August-Sept.'20	2020 4th Quarter	Jan-Feb'21.
Manufacturing & Industry	+5%	-20%	+14%	+30%	+43%	+39%
Construction	-21%	-15%	+22%	+15%	+15%	+11%
Wholesale and Retail Trade	+12%	-12%	+26%	+32%	+37%	+33%
Transportation and Storage	-1%	-23%	-12%	+2%	+15%	+12%
Accommodation and Food Service Activities	-18%	-68%	-48%	-16%	-12%	-27%
Information and Communication	+10%	+13%	+21%	+22%	+25%	+28%
Real Estate	-2%	-15%	+13%	+23%	+14%	+7%
Administrative and Support Services	-12%	-39%	-40%	-23%	-1%	-2%

March 2020 to February 2021: One- Year Averages

Year-on Year Rate of Change (%) in TURKSTAT Sectoral Turnover Indices	12-Month Avg.
Wholesale and Retail Trade	+23%
Manufacturing & Industry	+22%
Information and Communication	+21%
Real Estate	+8%
Construction	+7%
Transportation and Storage	0%
Administrative and Support Services	-18%
Accommodation and Food Service Activities	-31%

[33] TURKSTAT, https://tuikweb.tuik.gov.tr/PreHaberBultenleri.do?id=37321 (in Turkish), (Last Accessed: April 20th, 2021)


Year-on-Year Rate of Change (%) in TURKSTAT Sectoral Turnover Indices
+60%
+40%
+20%
0%
-20%
-40%
-60%
-80%
March'20
April'20
May'20
June'20
July'20
August'20
September'20
October'20
November'20
December'20
January'21
February'21
Manufacturing & Industry
Wholesale and Retail Trade
Information and Communication
Construction
Transportation & Storage
Real Estate
Administrative and Support Services
Accommodation and Food Service Activities
-18%
-69%
-68%
-55%
-41%
-23%
-9%
-5%
-9%
-23%
-30%
-23%

According to the TURKSTAT turnover index data[34]:

- **Accommodation and Food Service Activities sector** was by far the worst-affected in Turkey throughout the pandemic period.
    - This observation doesn't only hold true for the strict lock-down period between March and May 2020, but for the entire year from March 2020 to February 2021.
    - Unlike many other sectors that managed to bounce back and considerably recoup their turnover losses that took place at the start of the pandemic, accommodation and food services remained in the negative throughout the year.
    - While the sector appeared to make gains near the end of 2020, this trend did not hold, and the sector actually appeared to enter a new period of worsening turnover at the start of 2021 with the introduction of new mobility restrictions.

- **Administrative and Support Services** were the second most-affected economic sector.
    - This sector includes companies involved with event organizations, security, cleaning services, landscaping, call centers, packaging services and office support services.
    - The sector was harshly affected especially in the six months of after the declaration of pandemic, with year-on-year drops in turnover averaging 34% over this period.
    - After that time, the sector seemed to go back to similar turnover levels as the year before.
    - However, the sector never posted any year-on-year increases to recoup the losses made during the first six months after the pandemic.

- **Real Estate sector** involves companies that develop and sell real estate as well as those that provide intermediary services.
    - The sector had an average of 15% drop in their year-on-year turnover during the months of April and May 2020, right after the start of pandemic.
    - The sector, however, seems to have quickly bounced back with the start of the government-mandated renormalization period in June 2020.
    - Key informant interviews indicated that this was partially due to the effect of support programs by the government and partially due to the increasing demand for holiday homes instead of hotels in the time of Covid-19.

- **Transportation and Storage** sector, similar to Real Estate, had considerable year-on-year decreases in turnover in the immediate aftermath of the pandemic, with reductions in turnover averaging 23% over April and May 2020.
    - With the start of the renormalization period in June 2020, the decreases in turnover gradually slowed down and were finally reversed in September 2020 when the sector posted a turnover increase of 6% compared to the same period of 2019.

[34] TURKSTAT, https://tuikweb.tuik.gov.tr/PreHaberBultenleri.do?id=37321 (in Turkish), (Last Accessed: April 20th, 2021)

- **Construction sector** underwent a turnover drop averaging 21% in the period spanning March and April 2020.
  - The downward trend in turnover slowed down but continued in May 2020.
  - The sector then entered an upward trend from June 2020 onwards in comparison to June 2019.
  - The 29% year-on-year increase in June 2020 is interpreted by the key informants to be at least partially due to the sector recapturing the business opportunities that remained untapped over the previous three months in the stricter lock-down period.
  - The sector posted an average of %15 year-on-year turnover increase throughout the rest of 2020, from July to December.
  - The sector continues to display turnover growth in the first two months of 2021.
  - **However, it is important to note the following:**
    - The overall view in the key informant interviews was that increases in the turnover index may be, to a non-negligible extent, caused by inflation, higher exchange rates and the resulting higher price levels in this sector (similar to wholesale and retail trade, and manufacturing). For instance, TURKSTAT producer price index[35] went up by 27.09% in February 2021 compared to the same month in 2020.

- **Information and Communication** sector was the only sector that consistently increased its turnover throughout the pandemic period.
  - From March 2020 to February 2021 the sector increased its turnover by an average of 21% compared to the same period a year ago.
  - Expectedly, the overall finding from focus group discussions and key informant interviews was that the lock-down period, and the reduction in face-to-face interactions, generated considerable need for digitalization among businesses.
  - Information and Communication sector benefited from this emerging trend by catering to the higher demand for digital tools and services.

- Both **Manufacturing & Industry** and **Wholesale and Retail Trade** sectors underwent reductions in their turnover in the immediate aftermath of the pandemic declaration and corresponding lockdown measures.
  - After the initiation of renormalization process in June 2020, both sectors displayed increases in their turnover compared to the year before.
  - Rate of change in the turnover index for the Manufacturing and Industry sector averaged +33% throughout the period between June 2020 and February 2021. The corresponding rate for the Wholesale and Retail Trade was +32%.
  - **The warning cited for the construction sector applies here too:**
    - It is thought that these positive rates of change are at least partially due to price inflation. For instance, TURKSTAT consumer price index[36] for February 2021 went up by 12.81% compared to February 2020.

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[35] TURKSTAT, Producer Price Index (in Turkish), https://tuikweb.tuik.gov.tr/PreHaberBultenleri.do?id=37309 (Last Accessed: April 22nd, 2021)
[36] TURKSTAT Consumer Price Index, February 2021, https://data.tuik.gov.tr/Bulten/Index?p=Tuketici-Fiyat-Endeksi-Subat-2021-37380 (Last Accessed: April 22nd, 2021)

Turning to Syrian-owned small- and medium-sized enterprises, a Building Markets survey[37] published in January 2021, focusing only on SMEs, found that:

- 90% of SMEs stated that their turnover was lower compared to the same period last year by an average of 29% between March and May 2020.
    - The SMEs making up the remaining 10% were generally those that offer essential goods and services such as:
        - medical equipment,
        - food/agribusiness,
        - pharmaceuticals,
        - digital technology and services.
    - These SMEs actually reported higher turnover in comparison to the same period of previous year.

- **Logistics, manufacturing, and construction** sectors were most likely to report challenges during this period.

In similar fashion, ILO's report[38] from January 2021 indicates that:

- Workers in the **hospitality** sector (including accommodation and food services) are among those most affected by the crisis.
    - This is not due to any unique feature of the Turkish labor market but the inherently social nature of the restaurant, bar, and hotel businesses.
    - The report emphasizes that the long-term impact potential on the **tourism-accommodation** sector was estimated by the World Tourism Organization in March 2020 and confirmed by real data as the year progressed.

The TEPAV survey from June 2020[39] shows that **logistics, hospitality (including accommodation and food services), and construction** were worst-affected sectors in terms of the pandemic's effects on employment in the period between March and June 2020.

[37] Building Markets The Impact of COVID-19 on Syrian Businesses in Turkey, (Last Accessed: April 20th, 2021) https://buildingmarkets.org/sites/default/files/pdm_reports/building_markets_turkey_covid-19_assessment_210105_compressed.pdf
[38] ILO Turkey, Jan'21, "Beyond unemployment: The impact of the pandemic on hours worked in Turkey", (Last Accessed: April 20th, 2021) https://www.ilo.org/ankara/areas-of-work/covid-19/WCMS_766572/lang--en/index.htm
[39] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)

Findings from the TEPAV survey in June 2020, "How has COVID-19 affected Turkey's Labor Market" (**TOP 10 SECTORS are shown**) [40]

% who stated "I have been forced to go on unpaid leave (due to the pandemic)"	%	% who stated "There has been a decrease in my income (due to the pandemic)"	%
Transport and Logistics	51%	Social and Personal Services*	97%
Social and Personal Services*	49%	Construction	85%
Chemicals, Petroleum, Tire and Plastics	48%	Electrical and Electronic	79%
Metal	43%	Trade (Retail and Wholesale)	76%
Machinery	40%	Automotive	71%
Business and Administration	38%	Wood-processing and Papermaking	71%
Trade (Retail and Wholesale)	34%	Textile, Apparel, Leather	64%
Construction	31%	Energy	56%
Wood-processing and Papermaking	31%	Metal	51%
* "Social and Personal Services" include a wide array of service jobs such as waiters, chefs, in-store sales personnel, cashiers, travel services personnel such as flight attendants, etc.			

The TEPAV research shows that many employees in almost all economic sectors were considerably hurt with respect to their income or status of employment.

- The negative effect on the employees were most pronounced for the social and personal services jobs involving occupations that are mostly related to face-to-face interactions with customers for assistance or sales. Almost all (97%) employees from social and personal services jobs reported some degree of income loss. 49% of them were put on unpaid leave.

- The sector with the highest rate of unpaid leave was reported to be transport and logistics (51%).

- As for the textile, apparel, and leather employees, 64% of them stated they have experienced loss of income due to the pandemic.

- Employees in the construction industry also reported high levels of income loss (85%) but, similar to the situation for textile employees, they were less likely to go on unpaid leave (31%). This might be interpreted as a sign of the prevalence of informal employment in these two sectors, which prevents employees from accessing the government support packages related to unpaid leave during the pandemic period.

- A high ratio of Retail and Wholesale trade employees (76%) also reported loss of income, which can be taken to indicate that lower demand resulted in pay cuts or loss of performance bonuses based on sales.

[40] TEPAV, June 2020. How Has COVID-19 affected Turkey's Labor Market? https://www.tepav.org.tr/upload/mce/2020/notlar/how_has_covid19_affected_turkeys_labor_market.docx.pdf (Last Accessed: April 18th, 2021)

SECTION 4: SECTORAL ANALYSES

This section outlines, for each sector under focus, the qualitative findings from key informant interviews and focus group discussions. The action sectors prioritized by the 2019 Labor Market Assessment[41] were:

a. Textiles
b. Real Estate
c. Hospitality (incl. Food Services and Accommodation)
d. Retail Trade
e. Food Production
f. Healthcare
g. Information and Communication Technologies

The **qualitative** findings for each of these sectors are discussed in this section.

All statements in quotation marks indicate direct references to the interview respondents who participated in the focus group discussions or key informant interviews.

TEXTILES SECTOR

Overall Effects of Covid-19

In the COVID 19 period, in line with changes in the consumption and production habits, shopping malls have closed (or had considerable downtime during lockdowns), social areas have narrowed, and social activities have declined. Office environment has lost a significant portion of its importance and home-based work has come to fore through digital tools. As these changes took place, logistics, cargo activities, e-commerce, integration into major e-commerce platforms and digital marketing gained considerably in importance.

Adapting to Changing Demand

In the midst of these developments, the ready-to-wear industry, as well as the textile industry in general, have maintained their significance in terms of their employment potential. In contrast to other industries that were more directly impacted, the textile industry has been able to avoid mass layoffs by implementing strategic shifts in supply chains that have, to a degree, increased the importance of higher-skilled jobs.

Domestic use of home textiles and everyday clothing has increased with Covid-19. Some clothing manufacturing companies focusing on other types of products have been seriously impacted and unable to recover. Although the situation has recently improved, this negative effect is still important. On the other hand, usage of medical products and hygiene materials has increased as a result of intensified health measures, and manufacturing channels in the textile sector have shifted to medical products.

[41] Save the Children, INGEV- 2019- Gender-Sensitive Labor Market Assessment in Istanbul - https://ingev.org/raporlar/SaveTheChildrenGenderSensiteveLMA.pdf (Last Accessed: April 21st, 2021)

Covid-19 has led to the emergence of new business lines such as production of masks and visors. These are considered to be new lines of business for many textile companies. They created a route for adaptation to the market landscape changed by Covid-19 for many companies in the sector due to their high demand. Mask design, production, distribution, and sales stood out among the key revenue-generation mechanisms for many textiles companies[42].

Following a decrease in exports and a contraction in total turnover (that were estimated to be respectively 40% and 30% by one of the interviewees in the study), important players in the clothing industry such as Vakko, Koton, LC Waikiki, and Mavi decided to start temporarily or permanently closing their stores. Vakko announced that it stopped textiles production and started producing masks to be delivered to healthcare professionals[43]. According to one of the interviewees, contribution of medical textiles in the sector is around 7-8%.

Shortage of raw materials has also become one of the key issues for textiles companies (as synthetic products have also been used intensively in the medical textile production). These materials have been transferred to medical production at the expense of creating an emerging shortage of raw materials for clothing production.

Increased input costs (such as raw materials, iron/steel and higher transportation costs) have been transferred to the final products. The strategies used to overcome the difficulties in accessing finance and weathering the contraction in the markets were the main determinants of survival in the market. The companies which could not provide collateral to guarantee their credit viability have found themselves in a much more disadvantaged position.

On the other hand, companies that have been able to respond to these changing demands (especially without scaling down) managed to turn this downturn into an opportunity.

Syrian Enterprises in the Sector

While the service sector has almost completely closed, stores selling textile products have remained relatively viable. The Covid-19 conditions led people to stay away from shopping malls. Some major retail chains closed some of the stores or stopped their activities completely particularly in the lockdown period. “Rather than size or capacity, flexibility came to the fore under the Covid-19 conditions.” For instance, acting swiftly to update the digital infrastructure in e-commerce or diversifying the product range have become the crucial success factors for the textile sector. Yet, while Syrian firms also attempted to boost their digital marketing and online commerce activities, the impression among the sector professionals interviewed in the study was that these firms did not derive much benefit from their attempts at adaptation. That was because:

i. their financial situation did not allow them to receive expert support in digitalization,
ii. they did not always have the sufficient know-how,

[42] Kuveyt Turk Bank, Entrepreneurship Ideas in time of the Pandemic (in Turkish) https://www.kuveytturk.com.tr/blog/is-dunyasi/pandemi-surecinde-parlayan-girisim-fikirleri (Last Accessed: April 23rd, 2021)
[43] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf

iii. most importantly, they mainly catered to the customers from the Syrian community in Istanbul among whom credit card ownership was rather low, hampering the prevalence of e-commerce.

As Turkey stands out as one of the pioneering countries in textile exporting, the situation in the destination country for the exports also mattered a great deal. For instance, it was said during the interviews that "companies which have trade relations with the UK have been at a relative disadvantage compared to those that have trade links with Germany which haven't been affected at the same level." The overall consensus from the interviews was that export relations with Arabic-speaking countries including Iraq "have been in a general decline" since the beginning of the Covid-19 period. This situation is expected to negatively affect Syrian businesses as well.

Employment Pathway

Production lines in the textile sector do not easily allow to work in the digital environment, thus the sector's production mainly rely on manual ("face-to-face") work. In the textiles sector, Syrians in Istanbul contribute both as employees and company owners, and Syrian women are also highly involved in the production. However, Syrian workers could not get access to government aid programs mostly because of their unregistered status.

In general, number of Syrian employees is higher in the field of sewing as well as in the fields of sales and marketing. For sewing, training is mainly conducted on-the-job. In order to access job opportunities, Syrian jobseekers generally rely on ISKUR announcements as well as personal acquaintances and contacts. Syrian businesses, on the other hand, publish job opportunities on social media (most often on Facebook and Instagram pages) and again rely on the personal contacts of their owners or staff to recruit new workers.

Adaptation of textile and apparel firms to digital marketing and e-trade channels is not thought to bring about any great changes in the types of positions available in Syrian companies. This was especially true in the first few months of the pandemic (March-May 2020). These companies are thought to generally rely on their existing teams to conduct digital marketing. As these are usually micro-enterprises with nine or fewer employees, sometimes owners themselves personally carry out their own digital marketing activities. As such, Syrian companies in the sector—which form a key source of employment for Syrian employees—did not considerably increase their demand for e-trade professionals at first. Moreover, they are thought to have reduced the size of their production teams in general. In the cases where production had to be cut down, some companies reduced the working hours of their workers in order to be able to retain their staff without letting some of them leave entirely. Although this reduced the number of those who have completely lost their jobs, it still caused income losses for the workers.

After June 2020, it became obvious that the pandemic conditions would not completely vanish in the short term. This led some Syrian companies to look outside of their teams to satisfy their demand for e-commerce and digital marketing. The need for more competitive workers in marketing, especially in social media marketing, has increased since then and somewhat revitalized the job market in the sector.

Entrepreneurship Pathway

Many Syrian company owners particularly located in the Nisantasi district of Istanbul (known for its cluster of fashion and textiles companies) focus their production mainly in the niche products such as evening dresses and wedding dresses, and others produce everyday clothing for women or children. The field of cotton-based textiles as well as production of practical apparels such as jeans and other everyday clothing were especially recommended for the entrepreneurship pathway by the Syrian entrepreneurs interviewed in the study. The demand for these types of products did not decrease significantly and their production costs are generally low, rendering them affordable for the customers. Their production is thus still recommended as a potential business idea for micro- or small-sized enterprises. Syrian textile producers of the product types mentioned above also have advantages over local manufacturers in accessing the markets in Arabic-speaking countries. Exports to Gulf countries have become simultaneously more important and harder for Turkish exporters since the beginning of the pandemic. Partnering with Syrian companies may help local companies in accessing these markets.

Producing clothing is not the only recommended area in the textiles sector. Local Syrian-owned stores, which are located in neighborhoods where the Syrian community densely live, and sell apparel and clothing procured from Syrian producers, were thought to be rather resilient in the face of Covid-19 conditions. Therefore, it was thought that this still continued to be a high-potential business idea for Syrian micro-entrepreneurs.

Despite all this, it was frequently mentioned that uncertainty associated with Covid-19 negatively affected the appetite for new business ventures and the entrepreneurial spirit among both local and Syrian communities in general. The interviewees from the textiles sector pointed out that entrepreneurship has not increased during Covid-19 period. It was rather the already-existing companies that drove change in the market as they shifted production toward medical textiles and everyday clothing in order to satisfy the changing demand structure.

REAL ESTATE SECTOR

Overall Effects of Covid-19

According to a research by Deloitte Turkey[44] conducted in the early months of the pandemic, construction and real estate are among the most affected sectors. According to the research, 75% of the respondents from the Construction and Real Estate sectors expected more than 20% decline in 2020, while 88% of the respondents said they have difficulty in understanding and tracking the impact of Covid-19 on the sector and therefore experience difficulties in planning and rapid decision making.

The most negative factors were listed as decline in demand, labor mobility constraints and cash flow problems. Considering the working conditions and rate of spread of the virus, it was perceived that the Covid-19 threatened the continuity of the workforce. One interviewee from the sector estimated that "15 thousand construction workers in Istanbul alone were dismissed and sent to their homes in just 15 days in April 2020." In parallel with the decline in demand, Turkey's overseas contracting services, worth $18 billion in 2019, were also expected to be affected in 2020[45].

The sector is also very connected to the general health of other sectors as well as the costs of financial instruments. Being effective in dealing with the rental and sales price fluctuations based on seasonal and other factors have always been decisive for success in the sector. Flexible solutions have been required to adapt to uncertainty. For example, the Izmir earthquake on October 30th, 2020 has triggered considerable changes in the demand structure faced by the sector, causing variations in the individual preferences of buyers even in other cities such as Istanbul (with earthquake resilience of a district or neighborhood coming to the fore as a key determinant of buyer and tenant preferences).

COVID-19 pandemic has similarly changed the demand towards houses with a garden or balcony. The interviewees from the sector pointed out that during the COVID-19 period, office rentals "have hit the bottom", and "offices with large spaces have seen the highest reduction in demand." Some existing tenants with large numbers of staff moved out to smaller spaces. An interviewer estimated that a considerable decline occurred for "A+ offices' demand levels" ranging "between 35-40%." It is estimated that "shared office areas will increase" and "companies will prefer moving to smaller offices."

Food service locations such as cafes and restaurants have changed hands with considerable discounts in rents. Moreover, along with transition to online education during the outbreak, "mobility of nearly 150 thousand students in Istanbul has been interrupted", and the sector has experienced a lack of demand in residential areas, "especially those populated by students at universities." Yet, despite all the disadvantages, "real estate sector is relatively less affected in comparison to the hospitality sector."

The biggest advantage of this sector is the possibility to switch its operations to digital platforms with the opportunity to work remotely. Frequent customer visits on weekends before COVID-19 have also been transferred to online platforms in the "new normal." Digitalization of the

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[44] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, (Last Accessed: April 22nd, 2021) https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html

[45] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)

operations and online visits ("even with the help of drones in some cases") have made it easier to balance the drop in the frequency of client visits. Some of the more creative real estate companies have actually helped create Instagram influencers among the real estate experts within their ranks. One example is "Emine Celik of Coldwell Banker Dikey[46] whose Instagram followers climbed from around one thousand in March 2020 to more than fifteen thousand in April 2021" according to a key informant.

With the announcement of extended loan terms (up to 15 years) and reduced interest rates between May and November 2020, relatively favorable financing models for customers played a catalytic role in the sector. An upward trend in real estate sales was observed during that time, despite the pandemic. However, in the same period, there was a certain increase in house prices as well, and these increases strengthened the demand for real estate agents who can take on consultancy roles in operational and intermediary positions for helping with price negotiations and accessing financing methods such as loans or mortgages.

Entrepreneurship Pathway

The real estate sector is one of the sectors in which Syrians in Istanbul have been most involved with. The sector had been providing important potential both in employment and self-employment opportunities.

For Syrian businesses in the sector, the contribution of tourists, "especially from Arabic-speaking countries," to the real estate market has been "great." Therefore, the Syrian refugees in this sector experienced substantial downturn due to the stagnation in tourism caused by travel bans. It has been stated by research respondents that, as of the summer of 2020, there was only a slight upward tick in the real estate sector. It was stated that the government's decisions on mobility restrictions was the main determinant of how the summer and autumn periods went, which are the seasons when the real estate sector is revived.

Similarly, in the first months of the epidemic, many factors such as the problems faced by real estate agents while adapting to the digital environment created a reduction in turnover levels. The spending by Syrian community as well as foreign buyers went down "as buying new properties started to be seen as too much of a luxury, especially for those who don't live in Turkey." The fact that these groups of buyers cannot benefit from financial loan opportunities to the same extent as Turkish citizens have also affected the sector negatively.

Syrian owned-firms' representatives who have contributed to our research stated that they have been working to enable customers to carry out property purchase and rental activities on online channels by developing new mechanisms. It was also stated that, in order to encourage customers from abroad, there is a focus on pre-reservations. Efforts were made to facilitate the delivery of purchasing documents through embassies. In addition, the Syrian interviewees stated that they have started to search for new markets. In this respect, they particularly focused on countries with relatively fewer restrictions for travel to Turkey. They have been focusing their marketing efforts on these countries. They have also been investing in new technologies such as online property visits. They would like to present potential buyers with all the necessary information directly through such channels.

[46] Instagram user name: *eminecelik.cb*

In the field of entrepreneurship, informal self-employment poses an important problem in this sector. It is important to be registered to the Istanbul Chamber of Real Estate Agencies, and at the same time meet all the conditions outlined above for employment. As real estate agencies are positioned as the bridge between clients and real estate developers, they follow the demands of both parties, and need to be trained on the dynamics affecting of both parties. They also need to follow current developments that can influence the real estate market and provide consultancy to their clients on issues such as

i. accessing financial instruments
ii. how to determine sales pricing and rent levels,
iii. bureaucratic processes in municipalities and other public agencies.

Employment Pathway

People from different age groups work in the real estate sector as office workers or in commission-based sales jobs in the field. Many pandemic-induced effects outlined above have also affected the workload of the employees, causing a reduction in commission-based income which is negatively affected by the reduction in the number of transactions.

Regardless of COVID-19, in order to maintain work in the real estate sector, a minimum of high school degree is traditionally required by employers. Candidates, who are successful after receiving a one-hundred-hour training and taking the ensuing examination, are eligible to receive the Ministry of Commerce authority certificate. It is said that employers also routinely look for 6 to 12 months of professional experience. Syrians who want to work (or start an enterprise) in the real estate sector would also be better off fulfilling these conditions.

Yet, Syrian interviewees stated that training in the real estate sector is very poor. They need more knowledge on various issues related to the Turkey's real estate market as they also have an advisory role in their relations with their clients. Even if they have heard of the existence of formal courses, they do not have enough information about how to access actual training opportunities. They also think there is a shortage of trainers who can teach in Arabic. Therefore, there is a significant gap in the real estate sector for trainers who have expert-level knowledge of the field and speak Arabic.

The interviewees mentioned that they use online education channels such as Coursera, Udemy, Google, Facebook, and Linda (which is a LinkedIn-based education platform), especially in areas related to the field of marketing. Employers stated that online job search sites are very useful. In the post-pandemic period, the practice of using LinkedIn to search for suitable candidates has been on the rise. Employers have difficulty in selecting suitable candidates due to the high number of applicants. Network sites such LinkedIn provide better access to employees with higher qualifications. Syrian companies emphasized that due to the widespread use of remote working systems, especially employees in the field teams should gain expertise in video call applications. They stated that especially with the new needs emerging in pandemic conditions, they felt their employees had great shortcomings regarding their digital skills, and that they started to increase the productivity of their employees with new trainings.

Areas of work such as sales, e-marketing, advertising, marketing content design, and expertise in search engine optimization have come to the fore. For example, one of the interviewees stated that although they had reduced the number of software programmers to one in the past, they increased their team to six people in this area during the pandemic period. In addition, in line with the strategy of opening up to new markets, enterprises began employing people from different nationalities in addition to Syrian employees ("such as Iranians"). The biggest challenge Syrians face in the sales area is the limiting effect of the temporary protection status when it comes to traveling, which hinders their work capacity. However, these restrictions obviously cannot hinder Syrians under temporary protection in areas such as social media and design.

Women in the Sector

Women are actively working in different positions in the real estate sector, and "more than one third of the registered members of the Istanbul Chamber of Real Estate Agents are women." Yet, various participants interviewed in the research stated that, while there are very successful women in high-ranking positions, such as office managers, e-marketing and sales experts, there are some difficulties as well, especially while working in the field. Some cases of verbal or sexual harassment, ("even rape or attempted rape") during on-location visits to properties on the market are among the most discouraging factors that restrict the entry of women to this sector. Especially with the increase in digitalization, active participation of women is expected to increase.

While the field of marketing and social media create important opportunities for women, Syrian-owned firms' representatives argue that women still face challenges stemming from their limited access to training and self-practice opportunities while growing up. This was brought up especially in context of strengthening their digital capabilities in areas such as sales, e-marketing, and online advertising. Such barriers are said to occur as a result of "the social norms prevalent in the community."

HEALTHCARE SECTOR

Overall Effects of Covid-19

Health sector has been facing a huge burden during the pandemic. The vital role that health-care professionals play in society has come to the fore all over the world.

According to the sector executives interviewed in the study, illnesses other than COVID-19 has been getting less attention "because of the overload created by the pandemic and public's overall reluctance to go to hospitals except for emergencies during this period." COVID-19 and related diseases have driven many hospitals' intensive care units to nonstop operation at almost full capacity, but demand for other units within the same hospitals has decreased. In the aftermath of the pandemic, different medical departments have had different reactions. According to research respondents in this study, COVID-19 has reduced hospital density significantly, especially in routine admissions ("by 70-80 percent"). All hospital visits and check-ups, other than emergency procedures, have come almost to a halt. "This reduction in visits especially applied to the period between March and May 2020. It started to reverse afterwards but visit frequency is still far away from pre-Covid levels." As a result, the sector has experienced significant contraction. The income of private hospitals declined as a result of this situation. Syrian entrepreneurs who run healthcare facilities such as polyclinics were very negatively impacted in general.

Entrepreneurship Pathway

Since going to hospitals during a pandemic is thought to be dangerous, options for remote medical assessment have risen to prominence in the health sector. The download rates of home fitness applications during this time span have increased significantly. Furthermore, several hospitals and clinics attempted to handle all of their patients' consultation procedures online, with the exception of emergencies. In the future, video healthcare services may be commonly used in this industry. Concepts like "home health, online yoga, online psychological counseling, and online doctor appointments" have come to the fore. Expensive software applications, such as "telemedicine, smart health apps, and wearable health technologies like Fitbit, home-based clinics (in a variety of fields from cardiology to gynecology), and direct video calls with doctors" have made it easier for a relatively small number of patients to access health services from the comfort of their own homes, at least in some areas.

Our interviewees, however, also expressed skepticism about home health examination apps and suggested that doctors must improve their digital communication skills in order to interact with their patients via video calls. Furthermore, the pandemic's effect on health-care institutions has been uneven. Major chain hospitals have withstood the adverse effects much more effectively than smaller hospitals and other medical facilities.

Syrian healthcare providers were negatively affected by the closures during the quarantine period and by the reduced demand for routine or non-critical on-site healthcare services. Especially small-scale service providers incurred significant financial losses. As mentioned before, effective digital communications and marketing gained in prominence. Other than this, according to the statements of the Syrian firms' representatives, the competencies required in their work have not profoundly changed.

Suppliers that sell healthcare supplies, surgical materials, and high-priced medical devices have also been in trouble during the initial months of the pandemic. Yet, medical suppliers' sector has slowly returned to stability due to the fact that such products are indispensable for both urgent and postponed operations. On the other hand, with the pandemic, a serious market has also emerged for "masks, overalls, glasses, Covid testing and personal sanitary materials."

Syrians in Istanbul make important contributions in the field of health tourism. Using their native Arabic language as an advantage, they mainly work in the intermediary channels between the demand side—coming mainly from Arabic-speaking countries or communities abroad—and the hospitals or clinics in Turkey.

A finding from the interviews was that "health tourism greatly focuses on aesthetic operations" such as those related to hair or teeth. However, these are not the only areas where there is significant demand from abroad. "The main target of the health tourism sector should be patients looking for treatment options for diseases such as (i) cancer, (ii) liver, kidney, bone marrow transplants, and (iii) reconstructive burn surgeries." Although revenues of aesthetic health tourism have been very low during Covid-19, these other operations mentioned, being much more critical in nature, continue to be much needed. The demand and need for facilities providing these operations in a high-quality manner has become even more crucial in the chaos brought on to the global healthcare sector by the pandemic conditions. "Despite many cancellations for aesthetic health tourism during the COVID-19 period, there was a significant increase in the turnover of operations for the treatment of diseases."

During this time, Turkey stood out in the region; patients who could not be treated in their own country came to Turkey, "even during the epidemic's peak periods." Turkey has "exceeded its regional rivals in the field of health tourism thanks to government incentives" provided during the pandemic. For example, India is a major rival for Turkey in terms of healthcare tourism for major surgeries. One interviewee stated that "despite its enormous potential, India's health infrastructure has been observed to be relatively inadequate in the fight against the epidemic, and the country's health tourism sector has shrunk." During the pandemic period, "many people have chosen to receive care in Turkey." Medical procedures were performed on the patients thanks to facilities that were ideal for hygienic conditions.

Turkey has a long history in this field and has run international marketing campaigns. Patients have flown in from countries "such as Germany, England, Russia, and Ukraine on private planes." In these medical operations, hospital chains in Istanbul, in particular, came to the fore. Although travel agencies can handle cosmetic operations, they cannot handle significant process management (such as the preparation of comprehensive cancer treatment protocols) in critical medical operations that stood out during the pandemic period.

For entrepreneurs, a minimum of two years of experience in organizing state-of-the-art medical operations and health tourism management is recommended. There is a severe shortage of skilled workers in this area of work. To ensure success, there is a need for care workers and trained employees. However, entering the field of medical tourism (especially as an entrepreneur) is extremely difficult for Syrians in Turkey. For instance, for critical medical procedures, it is important to know a network of professors in Turkey and possess experience with the complex healthcare protocols in the country. At the same time, having relationships with large hospitals that can offer quick solutions is critical.

Syrian entrepreneurs have actively been seeking to enter the health tourism sector. Although they actively worked in aesthetic operations as both entrepreneurs and employees, and established connections with travel agencies and hospitals in the pre-pandemic period, their work came to a halt due to travel cancellations. “There are fewer Syrian entrepreneurs and employees in the tourism sector who target more critical operations.”

Employment Pathway

Pre-Covid, it was advantageous for those who speak Arabic to work in a healthcare-focused travel agency, and “they also had advantages in obtaining international authorization certificates.” “People from the Gulf countries with high income levels prefer Turkey for aesthetics and hair transplantation,” and there is demand for hair transplantations “from countries such as Morocco, Algeria, Tunisia and Iraq.” However, as mentioned before, during the pandemic, demand for aesthetics has decreased considerably because of restricted mobility. Travel agencies, aesthetic centers, and hair transplantation centers were negatively affected, “decreasing the number of their staff.”

Regarding employment, representatives from Syrian-owned firms stated that they have difficulties in finding qualified employees. They mainly rely on social media channels and direct CV applications in their recruitment process. Especially Syrian candidates with higher education degrees and professional interpreters are prioritized.

In medical clinics, “there are at least two to three months of on-the-job training for new candidates.” Especially those who have a white-collar background and those who are qualified with proper trainings adapt quickly. During the Covid-19 period, medical clinics had to reduce the number of their employees and in some cases brought their operations to a halt.

Some Syrian company officials tried to strengthen their capacities by organizing internal trainings during this period of closure and returned to their work again during the renormalization period in summer 2020. Throughout the pandemic, monitoring of old patients and outreach activities for new patients were carried out, but things stopped again with the re-start of closures later in 2020. This uncertainty was one of the factors that prevented employers from making new hires.

One Syrian entrepreneur said: “Previously, we used to pay large sums for marketing, but now our budgets have become much more limited. It is much harder to access training opportunities and competencies needed to improve sales. There are distinguished sales trainers, but we cannot afford the high fees requested by such specialized trainers. In addition to training in recent scientific development—and translating them for employees—we also need trainings in Instagram Marketing and search engine optimization (SEO).”

Syrian company representatives stated that work experience is very important in this sector, regardless of nationality or ethnicity. Syrian employees have also specialized in areas such as translation and customer services, especially because their accents are easily understood in all Arabic-speaking countries. Besides, good command of the Turkish language is always an important advantage in daily activities and operations. However, it was stated that the employment of Syrian doctors is very difficult, especially due to official regulations.

Due to the lack of demand in the domestic market, operations focused on digital marketing tools targeting patient searches abroad. During this period, there was an increasing demand for photography, recording, editing, design, and interior design professionals, in addition to the need for consultants in the field of e-marketing.

On the other hand, due to the importance of physical distancing, “the need for office workers and on-site translators” as well as “transportation and coordination staff,” and “even those working in physical therapy departments” have decreased.

“Women can thrive in the sector if they have sufficient experience”, and “currently they tend to work especially in customer services.” E-marketing expenditures were generally increased under the pandemic conditions while it is thought that “women’s employment in customer service jobs were negatively affected.”

HOSPITALITY AND RETAIL SECTORS

Overall Effects of Covid-19

During the pandemic period, there have been many points of intersection where we can evaluate the retail and hospitality sectors together. It is thus useful to evaluate these sectors in relation to the factors affecting them mutually, albeit sometimes in opposite ways. One of the most important aspects determining the fate of a sector under Covid-19 is whether the services of the sector can be domestically consumed or not. That has been the fault line that decided how the infectious disease risk affected the hospitality and retail sectors.

With respect to people who were confined to their homes during the closures and periods of limited reopening, the distribution of products has largely been transformed with domestic consumption in mind. An interviewee who contributed to our research stated that “the money that could not be spent on high-priced luxury restaurants, entertainment services, tourism, and socialization is now being used for domestic consumption on online content platforms, long-term holiday home rentals, and online shopping. All are mostly paid for via credit cards.”

The demand for food has expectedly remained strong, but the pandemic has increased food consumption at home. Traditionally “only around seven to eight percent of revenues of an average restaurant stems from home deliveries”, which explains why the food services sector was very badly hit by the pandemic. Food retail, on the other hand, was the winner in this situation, as “it was among the sectors that were the least affected by negative effects of Covid-19.”

Between March and May 2020, in the immediate aftermath of the pandemic, people in Turkey have started to stock their homes for fear of quarantine. Customers especially increased their purchases of food and hygiene products. “Food retailers have seen up to 50% in traffic and revenue growth following the news of the first Covid case in Turkey.”

In order to meet the increasing demand, retailers started to expand their operations. “Migros announced on March 23rd, 2020 that it would hire 1,000 people to respond to the increasing demand.” Online sales of food retailers also increased in the same period, and retailers who had not previously sold online started to do so with the decrease in store traffic[47].

Product lines such as affordable ready-to-eat food have seen an increase in turnover, but food retail wasn’t the only type of retail that has seen an increase in demand. Services and products such as “domestic renovations and decoration, house furniture, hygiene materials, hobby materials” targeting domestic consumption have grown.

In line with the statements of our interviewees, it can be easily said that, while the retail sector for domestic consumption has grown during the pandemic period, the wholesale sector, which sells in bulk to the hospitality sector companies such as restaurants and hotels, has contracted. Due to the dramatic decrease in the wholesale market, “Metro Market, known for its wholesale sales, also intensified its focus on retail.” Some major manufacturers “have opened their own stores on well-known e-commerce platforms.”

It is also important to note that not all product lines of retail trade have been positively affected. Business areas such as “food services, stationery products, theme parks, movie theaters,

[47] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)

playhouses and cosmetics" have shrunk. The sectors based on "imports were negatively affected by lags in international supply chains and logistics."

For those who want to further increase the safety of their food, the practice of "self-catering" became more common. In the system implemented by many ready-made food companies, frozen foods are individually packaged and delivered to customers. Customers open their product packages by taking personal safety precautions and cook the products at home on their own[48].

"Some restaurants have managed to survive as long as they could adapt to the fast delivery service requirements of the market, while others have had to close." However, even restaurants that developed the appropriate delivery services "have been losing considerable amounts of profit."

According to Deloitte Turkey's report[49], 86% of the companies that were affected by the decline in demand and cash flow think that financial risk management will be very important and operational costs has become one of the main concerns in the sector. One sector representative who participated in the research stated that "in 2019, restaurants, cafes, and similar food service outlets in Turkey have created an economic value of approximately 125 billion TL with 100,000 small and large outlets and 2 million employees. That figure is expected to go down to around 30 billion TL in 2020 due to the pandemic."

According to research by EY Turkey[50], the turnover in the food service sector was 4.5 billion TL in January 2020, while it is observed that it fell to 3.2 billion TL in March 2020. Food expenditures, which were 1.1 billion TL in the week of March 13, decreased by 42 percent in the week of March 20 to 615 million TL (first Covid-related death in Turkey was announced on March 15th, 2020).

In the initial months of the pandemic the food services sector experienced a decrease even in orders for home delivery. Due to the contagiousness of the virus, consumers started to place fewer orders on food made outside of their homes[51]. During the 2-month period when the restaurants were closed in April and May 2020, online food ordering platform, yemeksepeti.com announced a decline of 40% in website traffic[52]. President of the Union of Chambers and Commodity Exchanges of Turkey ("TOBB") issued a statement expressing that restaurants' turnover has decreased by up to 75% compared to the pre-COVID period[53].

With the COVID-19 outbreak, changes are observed in eating habits as well. While only 15% of the consumers stated that they started to consume home-cooked meals more frequently, 29% stated that they now eat healthier. It is stated that the main purpose of consuming healthy foods is to strengthen body's defenses against the virus[54].

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[48] Kuveyt Turk Bank, Entrepreneurship Ideas in time of the Pandemic (in Turkish) https://www.kuveytturk.com.tr/blog/is-dunyasi/pandemi-surecinde-parlayan-girisim-fikirleri (Last Accessed: April 23rd, 2021)
[49] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html (Last Accessed: April 22nd, 2021)
[50] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)
[51] Ibid
[52] Ibid
[53] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html (Last Accessed: April 22nd, 2021)
[54] Ibid

The shopping center sector has also been in decline, and bankruptcies are expected as the physical store segment tries to fight costs. Following the emergence of the first case of Covid-19 in Turkey on March 11th, 2020, shopping malls saw a 15% decrease in the number of visitors and entered into a difficult period with the increase of cases[55].

Due to the rapid spread of the COVID-19 virus, the closure of shopping malls and stores has significantly affected the retail industry. The current situation creates great difficulties especially for the non-food retail sector, which derives a significant part of their turnover from customer foot traffic. It may be necessary to take measures both in-store and outside of the store in order to solve the problems that occur in the supply chains, human resources, and store operations, and to make a healthy transition to the post-pandemic period. Due to the closure of stores in the non-food retail sector and physical distancing practices in the food retail sector, consumers have mainly directed their shopping to e-commerce channels. Although the e-commerce turnover of the companies has reached record levels, "it does not seem possible for this channel to reach the turnover obtained from physical channels in the normal period." Therefore, it is seen as critical to prepare the store format, which has an important place in total trade, for the new period with necessary measures in order to overcome the crisis[56].

EY Turkey predicted in May 2020 that, if the effects of the Covid-19 continue, 40 percent of small stores in the non-food retail sector may have to terminate their businesses[57]. Our interviewees estimated that density of shopping malls will decrease. According to estimations, the shift in buying habits towards online channels will continue to take root in near future even if the pandemic ends. Online marketplaces will continue to be important sales channels and demand for online shopping will force manufacturers to invest more in logistics and technology. In the global level, competition between local retailers in developing countries and global giants will intensify[58]. "Maintenance of both online and physical stores as well as the use of sales strategies on multiple platforms have developed considerably during the pandemic period."

Tourism and hotel businesses have suspended their operations to a large extent, due to the stopped flights and physical distancing rules. In tourism, which is one of the sectors most affected by the pandemic in terms of both employment and income, recession have not subsided since 2020, though a short reopening season in summer 2020 briefly mitigated some of the losses in the sector. According to Morgan Stanley, 31 percent of business travel will turn into online meetings permanently[59]. While proliferation of vaccination programs may contribute to revitalization in the tourism sector, sector professionals don't foresee a return back to the normal within 2021. A respondent in the research study stated that "most early bookings for summer 2020 received in the interval from November'19 to February'20 in the pre-pandemic

[55] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)

[56] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html (Last Accessed: April 22nd, 2021)

[57] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)

[58] The Economist Intelligence Unit, Excerpt from Dunya Newspaper, "10 Business Trends for 2021" (in Turkish) https://www.dunya.com/ekonomi/2021-yili-icin-10-is-trendi-haberi-604314 (Last Accessed: April 23rd, 2021)

[59] The Economist Intelligence Unit, Excerpt from Dunya Newspaper, "10 Business Trends for 2021" (in Turkish) https://www.dunya.com/ekonomi/2021-yili-icin-10-is-trendi-haberi-604314 (Last Accessed: April 23rd, 2021)

period were cancelled." The losses in international bookings in tourism reached 40% in 2020[60]. "Millions of jobs in the sector continue to be at risk."

Employment Pathway

The intense interest in online shopping services (not limited to food purchases) during pandemic caused the companies that were caught unprepared to experience various problems in delivery. For instance, in grocery shopping, same-day or "same-hour" delivery is a great convenience for consumers who do not want to leave their homes during the pandemic. Many companies offer new employment opportunities during the pandemic process by hiring freelance drivers who own their own vehicles or motorcycles for home delivery[61]. "Serving as home delivery workers became a very popular path for employment as well as a route for self-employment during this period."

A finding from the key informant interviews is that if the hospitality sector is analyzed in terms of employment, it is seen that blue-collar workers (such as cleaning workers, tea makers, and cleaners) were the hardest hit in terms of rising unemployment. On the other hand, a significant portion of the young and middle-aged employees who lost their jobs in the hospitality sector (such as hotel and restaurant businesses) is said to have shifted to the retail sector in various positions such as those in logistics, warehouse or store management, or supply chain operations. "These occupational groups have experienced considerable employment growth," along with "courier services" in the logistics sector for lower-skilled employees. These changes have also taken place in the smaller-sized retail stores owned by the Syrian entrepreneurs. Main customer base of such companies consists of the members of the Syrian community and so these enterprises usually employ Syrians to cater to the needs of their customer base.

Especially Syrian restaurant owners stated that they suffered a great loss in their business due to the great decrease in the number of Arab tourists, who have a leading role among their customer base in driving up demand. While many Syrian restaurants preferred to completely close down due to this obstacle, "the surviving enterprises seemed to benefit from the closure of competitors and the decrease in competition when it came to promoting their business." However, they had to bear the costs of creating "high-quality delivery systems" which made the adaptation period last longer. A need for e-marketing specialists have emerged in order to drive sales as well.

In the re-normalization period starting from June 2020, initiatives such as "developing promotions and product suggestions in line with changing needs," "creating new online experiences for customers," "strengthening our corporate digital presence and keeping customer relationships alive" all became very critical for restaurants to regain consumers. Offering products and services for unmet needs, restructuring the pricing strategy, and developing digital capabilities and business model innovations played an important role in

[60] EY Turkey, Covid-19 Impact Assessment, (in Turkish), https://assets.ey.com/content/dam/ey-sites/ey-com/tr_tr/pdf/covid-19/strateji/covid-19_dunya-ve-turkiye-den-bulgular.pdf (Last Accessed: April 22nd, 2021)

[61] Kuveyt Turk Bank, Entrepreneurship Ideas in time of the Pandemic (in Turkish) https://www.kuveytturk.com.tr/blog/is-dunyasi/pandemi-surecinde-parlayan-girisim-fikirleri (Last Accessed: April 23rd, 2021)

returning to profitability and survival[62]. This generated interest in a host of ICT jobs related to digital tools for marketing, sales, and e-trade platform integration.

The importance of accountants who know the mechanisms of dealing with electronic payment systems have gone up.

With the transition to online commerce, the need to develop websites or integrating into online sales platforms was prioritized by smaller scale retailers (both food and non-food) and food service businesses. Syrian entrepreneurs also said that WhatsApp groups have also been frequently used among the Syrian community to provide easy connection between micro-retailers and their customers.

In-store sales consultants have switched to taking up various roles in online sales mechanisms such as packaging, warehouse operations, and delivery preparation. The most dramatic change has been in sales channels and logistics, as client satisfaction in an intensely competitive environment depended a lot on rapid and high-quality delivery to the end user. For example, delivering high-value electronic products to end users is of critical importance. Therefore, people who specialize in software or digital tools for truck loading or routing as well as drivers with licenses for driving larger commercial vehicles have started to gain considerable competitive advantages in the sector. Research respondents stated that they have needed customer service staff who had good communication skills and were willing to work in a team. Micro-entrepreneurs also needed to access the services of financial management experts as most transactions started to take place away from their stores where the business owners could not keep track of the money flow as well as they do for in-store purchases.

In addition, it was reported that new employees needed training on food storage as increased frequency of home deliveries amplified the importance of such skills, especially when it came to products that require cold storage or an unbroken cold chain from warehouse to the end user.

The need for experienced delivery workers and drivers has increased tremendously. Their past experience and skills in communicating with customers was also crucial (as they now were the only ones who dealt with the customers face to face).

Although women are not frequently employed in restaurant kitchens or as waitresses ("for cultural reasons" as one interviewee put it), it has been said that they can work especially in the management of these restaurants and customer relations.

During the pandemic, while office workspaces were closing down, manufacturing factories engaged in production as the retailers increased their demand due to product diversification. "Manufacturing workers especially in the food production sector continue to be in high demand."

It is obviously not expected that physical retailing will end completely in the retail sector, however, the sector does have the opportunity to significantly bring down costs by reducing physical retailing. For this reason, many retailers have either created their own online sales channel or started selling on online marketplaces. As in other sectors, this increased the retail

[62] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html (Last Accessed: April 22nd, 2021)

sector's demand for a variety of information and communication technology jobs related to digital tools.

For Syrian companies in the logistics sector, small-sized operations such as regional truck fleets that transport to Arabic-speaking countries were also specified by the interviewees as potential sources of employment. For Syrian companies, the importance of effective logistics companies transporting to Arabic-speaking countries has been better understood during the epidemic period. Small or medium scaled logistics companies specializing in export trade to the Arabic-speaking countries such as Iraq helped the enterprises in the Syrian food production sector diversify their client portfolio in times of demand slumps. While this is a recommendation for entrepreneurship, employment of people who have the capacity to carry out the transportation operations in the field as well as act as sales agents also plays an important role in terms of sector's continuity. One interview respondent stated that the demand for the products of Syrian-owned food production companies from markets like Qatar and Oman during the pandemic has decreased, but demand from other countries such as Syria, Lebanon, and several European countries have gone up. Thus, the need for export experts to work in these fields continues to be significant for Syrian companies.

English language knowledge emerges as a very important feature in white-collar positions for international logistics companies. For such firms, import/export and customs affairs capabilities have also come to fore as desirable features. Professionals who have good command of both Arabic and English are considered to be quite advantageous in the sector, especially for small to medium scaled regional logistics companies who cannot maintain local offices with local employees who already speak the prevalent language in their country.

Entrepreneurship Pathway

Due to the shocking impact experienced in the restaurant business, alternative methods have been searched in this field. For example, "the establishment of central kitchens, called ghost kitchens, have proliferated." Distribution of meals to restaurants from these central kitchens have become more popular due to its cost-efficiency.

There is also a possibility that some physical stores with falling sales will turn into warehouses serving other sectors such retail or into ghost kitchens mentioned above, thus integrating into the home delivery chains.

Interview respondents stated that retailers mainly benefited from the pandemic period due to "volume increases based on product diversity" as well as "income growth based on inflation." For instance, in the food market, products such as "pastry decorations and components, chocolate, flour, yeast, mustard" have diversified the shopping baskets, and "sales of these goods have increased." Food production enterprises focusing on such products that are suitable for domestic consumption and home-cooking were likely to benefit from this trend.

Some Syrian company representatives stated that they saw a new demand for the spice trade during this period and that they entered this field. They stated that "selling healthy food and spices in districts where Syrians live intensively and also supporting this sales activity through social media is likely to be profitable" given the demand for such products in Syrian cuisine.

Firms that switched to foodstuff trade instead of providing food services have started to strengthen their sales channels and deliveries with a small number of vehicles and motorcycles. In fact, a Syrian-owned company stated that they "have been renting their vehicles from companies in the restaurant and tourism sectors that suffered from the recession." Thus, restaurants and hospitality sector companies tried to compensate their losses with the increase in demand in the retail sector and home deliveries. Repurposing company assets for end-customer deliveries could be advantageous for many entrepreneurs.

Natural nutrition and quality food production, "which had already been on the rise before Covid-19," became much more valuable especially during the pandemic period as these products were seen to be supportive of body's natural defenses against viruses and microbes. As many experts assert that people should pay extra attention to keeping their immune system strong throughout this period, an effective way of doing this was seen as consuming natural and organic foods. In the coming period, we may witness "many entrepreneurial attempts to produce organic agricultural and livestock products." Food production activities that satisfy such local needs is still estimated to be a good route for entrepreneurship.

With the pandemic, people who started to spend more time at home (and work remotely from home) turned to furniture shopping. Especially "the demand for office furniture for use at home has increased considerably since the beginning of the pandemic." There has been a demand for products that took up less space and were more practical. Office and kitchen chairs were among the most purchased items[63]. Chairman of the Board for the major Turkish office furniture company Nurus stated that during the pandemic, employees were either locked in their homes or moved to their summer homes[64]: "They prefer to carry out their business in these comfortable and less crowded places. We are heavily receiving office furniture orders from summer home regions, especially from Bodrum and Cesme."

President of the Istanbul Furniture, Paper and Forest Products Exporters Association said that furniture, paper, and forestry products sector has grown systematically since 2002 and exports were worth $3.5 billion even in 2020[65]. Virtual trade delegations were organized in existing and target markets. Both physical and virtual fairs were held in pandemic conditions. The most purchased types of furniture in 2020 were children's cots, cradles, dining and living room furniture, wooden furniture used in stores, wooden medicine cabinets and wooden bathroom cabinets.

In light of these findings, furniture production and delivery as well carpentry all present promising business opportunities during the pandemic period.

According to the Association of Turkey White Goods Industrialists data[66], wholesale volume sales grew by 13.9 percent in six main categories including refrigerators, freezers, washing machines, tumble dryers, dishwashers and ovens, compared to the first nine months of the previous year. Credit incentives during the pandemic period caused the renewal of electrical home appliances and positively affected the companies in the sector. Interest in the sector is expected to continue throughout 2021. One finding from the interviews was that "delivery and

[63] Excerpt from Haberturk Newspaper; "Increasing demand for office furniture"; (in Turkish); Last Accessed: April 22nd 2021; https://www.haberturk.com/kocaeli-haberleri/83275795-ofis-mobilyalarina-talep-artti-pratik-urunlere-ragbet-var

[64] Excerpt from Takvim Newspaper; "Increasing demand for office furniture for use at home"; (in Turkish); Last Accessed: April 22nd, 2021; https://www.takvim.com.tr/ekonomi/2021/01/25/ev-tipi-ofis-mobilyasina-talep-artti

[65] Excerpt from Hurriyet Newspaper; "Records are Being Broken" (in Turkish); https://www.hurriyet.com.tr/ekonomi/tum-zamanlarin-rekoru-kirildi-41707639 (Last Accessed: April 22nd, 2021)

[66] Excerpt from Milliyet Newspaper; "Economic Sectors of 2021"; (in Turkish); https://www.milliyet.com.tr/yazarlar/zeynep-aktas/2021-yilinin-sektorleri-6395939 (Last Accessed: April 22nd, 2021)

technical maintenance of home appliances also provide promising entrepreneurship opportunities in neighborhoods densely populated by Syrians where such services are not already intensively in offer or don't provide service in Arabic."

One of the sector representatives in the interviews stated that the peak times experienced on certain days because of the shortened store opening hours had significant effects in the retail sector as well as the hospitality sector. It is thought that intermediary human resources providers may be needed in the near future in order to help the companies in these sectors outsource skilled employees in line with changing demand levels. In line with this view, another respondent emphasized that dual part-time working systems can also move more into focus. As in many other sectors, having core knowledge of different businesses is an important feature that can increase the flexibility and capability of employees when it comes to shifting back and forth between different part-time jobs. "Employees who can change between in-store sales experts and waiters have higher chance of minimizing their idle time."

At the same time, Syrian enterprise owners who were interviewed also stated that in order to strengthen marketing, they started looking for public relations and customer services employees who can target all of Istanbul through social media tools as well as drivers who would provide delivery services around the city even if they were to use their own vehicles.

Regarding entrepreneurship, it is stated that investing large sums in the pandemic period is risky, and instead of this, new entrepreneurs should start with small amounts of capital to enter a market. It is especially recommended to try cargo or delivery services or online sales. In the logistics sector, due to the obligatory conditions brought on by the COVID-19 period, efforts to establish local and small-scale home delivery chains have begun. For example, by renting one or more motorcycles or by contracting freelance drivers who own or rent a motorcycle themselves, small-sized district-based companies can be established. These would work especially for restaurants and provide home delivery services preferably by utilizing a software that tracks the locations of the employees at all times. This pathway is recommended for lower-skilled entrepreneurs from both host and Syrian communities. In addition, with the increasing demand in the logistics sector, the need for packaging support (either for producing packages or packaging the sold items) has increased noticeably.

ICT SECTOR

Overall Effects of Covid-19

Given the fact that physical distancing has been one of the most important measures since the beginning of the pandemic, information technologies have increased in significance via virtual workspaces and video conferencing as well as areas such as automated production, robotics, and internet of things. Industry leaders such as Amazon, Google and Microsoft will compete as remote working increases the need for backup systems and cloud access.[67]

To avoid the risk of contiguous disease, many people around the world thought it was best to access all services over the internet as much as possible. Those who invested in the ICT sector have been among the winners of the process. The number of services that can be provided online is quite high. Sports applications, virtual trainings, e-books, magazines, virtual museums and tours are among the experiences that users can easily access on the internet. Organizations that provide online services free of charge can achieve extremely high advertising returns. Companies that receive relatively small amounts of fees from individual users can still achieve record profits due to immense reach and customer potential of internet as a medium[68].

Technology, Media, and Telecommunications are the sectors where digital technologies are utilized the most. These were better positioned to benefit from the impact of the pandemic in comparison to other sectors. According to Deloitte Turkey's research conducted in the early months of pandemic, positive growth expectations dominated the sector[69]: 67% of the respondents in the sector described the period of COVID-19 as a period of increasing demand. Together with the measures taken, 82% of the respondents thought they could maintain their cash positions for more than 6 months[70]. The value of technology companies on the stock exchange went up by 91 percent in 2020[71]. The ICT sector, whose growth accelerated with the coronavirus epidemic in 2020, will also be on the radar of investors in 2021.

Entrepreneurship Pathway

During the pandemic period, technology companies took actions to minimize the increase in investment expenditures and operational expenses[72]. Distance education and tutoring, online courses, online workshops and even online MBA programs have also gained in popularity all over the world[73]. One interview respondent from the study stated that "spending so much time at home and purchasing intensively through internet is likely to create permanent and radical changes in our consumption habits in the future." For instance, "the number of subscriptions

[67] The Economist Intelligence Unit, Excerpt from Dunya Newspaper, "10 Business Trends for 2021" (in Turkish) https://www.dunya.com/ekonomi/2021-yili-icin-10-is-trendi-haberi-604314 (Last Accessed: April 23rd, 2021)
[68] Kuveyt Turk Bank, Entrepreneurship Ideas in time of the Pandemic (in Turkish) https://www.kuveytturk.com.tr/blog/is-dunyasi/pandemi-surecinde-parlayan-girisim-fikirleri (Last Accessed: April 23rd, 2021)
[69] Deloitte Turkey, Post-Covid Winners and Losers in Supply Chains, https://www2.deloitte.com/tr/tr/pages/consumer-business/articles/Covid-19-sonrasi-tedarik-zinciri.html (Last Accessed: April 22nd, 2021)
[70] Ibid
[71] Excerpt from Milliyet Newspaper; "Economic Sectors of 2021"; (in Turkish); https://www.milliyet.com.tr/yazarlar/zeynep-aktas/2021-yilinin-sektorleri-6395939 (Last Accessed: April 22nd, 2021)
[72] Ibid
[73] https://moddworks.com/corona-sonrasi-is-fikirleri/

on recipe-related websites and YouTube channels has increased significantly." "We may witness the rise of brands or individual entrepreneurs who can adapt to this by creating online content, targeting the changing media consumption during the pandemic." The technology sector, which had a positive year in 2020, "continues its acceleration in 2021 with the revival of economic activity."

It has been also reiterated by all sector representatives in the scope of this research that the ICT sector has grown holistically, with expansion from different areas of expertise. Software management, production, web design, e-trade, and digital marketing are all among the services which experienced increased demand in line with the trends related to online shopping and remote work. Since most socialization during the lock-down periods takes place via electronic devices and software tools, a sector representative stated that "sales of devices such as computers, tablets and in-house technologies increased considerably" ("although they initially decreased right after the start of pandemic").

For Syrian ICT professionals and start-ups, Syrian clients dominate the demand side domestically in Turkey. However, companies from all Arabic-speaking markets who want to move their business online can be potential customers. Syrian ICT and social media companies stated in the interviews that they experienced fluctuations in demand during the period of great confusion in the very early days of the lockdown measures, and they preferred to work with freelancers rather than expanding the number of staff on their own payroll during this period, but their businesses got on an upward trend in general during the pandemic.

The recession in the first days of the lockdown measures generally applied to ICT companies working with restaurants. With the sudden collapse in the restaurant sector, it took time to develop new strategies to attract customers who were not used to ordering online in the past. The search for reliable experts in the field of ICT has increased, especially by food service and retail companies that want to improve their sales. Various sectors put great emphasis on digital marketing and e-commerce. The interviewed company owners from the ICT sector stated that the biggest problem was "the amateurs crowding the market and bringing down the market value of ICT services."

Entrepreneurship and Employment Pathways

For those who want to become an entrepreneur, it may seem sufficient to have a professional computer and software knowledge. The financial cost is not very high, "but the main investment in this field is made in human resources by developing the necessary expertise and experience."

Most opportunities in the ICT sector apply both to employment and self-employment opportunities. Thus, entrepreneurship and employment pathways are not separated for the discussion of the ICT sector.

Areas such as graphic design, video industry and photography have gained importance.

Demand for all jobs in the fields of programming (website development, digital galleries, and mobile development), digital marketing (search engines and graphics), design and content creation has increased.

An interview respondent from the ICT sector stated that “the simplest programming tool is the wordpress language, but more advanced programming—such as creating integrated e-stores—can take years to master.”

Trainings conducted in photography, social media management, and database management areas would all contribute to sales and marketing, thus making it easier for enterprises to move their business online.

In the field of marketing, the promising positions mainly include project directors, content writers, designers, and social media experts.

Apart from these, there is a need for programmers. Programming in Turkey is developing quite rapidly due to high demand. Entrepreneurs who can assemble a specialized team are said to “begin making profits as early as a month after launching the business.”

Syrians, and Egyptians in particular, lead the Arabic-speaking service providers in the market in this field “with a good reputation for having creative vision.”

In addition, this sector is said to be “preferable” for women, but the biggest problem is that women do not have enough experience and competence in the field of ICT “due to cultural and social norms directing them away from pursuing their interest in this area from early childhood onwards.”

Training opportunities are available from Google, Coursera, Facebook (marketing training), Udemy, YouTube, w3schools.com, and these can be used for personal development. Recruitment in this area is mainly done through “Syrian and international freelancers’ platforms (such as “mustakil,” or “khamsat”) and the Turkish platform, Armut.” However, due to the increasing number of applications with the pandemic, ICT companies have stated that they are turning to the LinkedIn platform in order to choose the right people with high qualifications. “Potential jobseekers would do well to be present in these networks.”

Research respondents from the ICT sector also stated that “machine learning tools and artificial intelligence-based software are expected to come to the fore in the near future.” Individuals with expertise in these tools will be at an advantage. These tools can be used to address issues such as managing customer traffic in retail stores by controlling the number of people in the same area of the store during the pandemic period or tracking how many customers look at which shelves for designing better offers or pricing strategies. Problems like these can be addressed with technology solutions that facilitate the work of retailers. In online trade, it has become important to create customized algorithms according to the shopping habits of customers. This requires producing custom-built programs made specifically for the companies in the retail sector, increasing the need for enterprises or employees with the specific talents to carry out these tasks.

As in other industries, one of the biggest obstacles for Syrians in this industry is said to be obtaining a work permit. Informal work is common, as it is difficult to obtain a work permit, especially for Syrians with tourist passports.

SECTION 5: UPDATE OF THE RECOMMENDATIONS FROM 2019

In light of the overall findings of this research study, the tables in this section reproduce the recommended employment and entrepreneurship pathways that were outlined in the 2019 Gender Sensitive Labor Market Assessment for Istanbul[74] report. New additions were made to the tables for the entrepreneurship pathways in the Logistics sector.

The last column on each table indicates whether given pathways are still recommended after the Covid-19 pandemic.

Summary of Recommended Employment Pathways:

Sector	Value Chain Phase	Occupation	Applicable in 2021?
Food Production	Operations	Chef Assistant	No
		Master Chef	No
Healthcare	Logistics	Patient Transfer Personnel	Yes
	Marketing and Sales	Salesperson	No
	Operations	Cleaning Person	No
		Health Consultant	Yes
		Patient Care / Care Support Personnel	Yes
		Patient Companion / Patient Relations Personnel	Yes
		Translator	Yes
		Waiter / Waitress (at hospital café)	No
Hospitality	Accommodation	Cook	No
		Guest Relations	No
		Housekeeping Assistant	No
		Kitchen / Cook Assistant	No
		Reservation / Front Desk Personnel	No
		Service Personnel (Hotel)	No
		Waiter / waitress	No
	Food Servicing (Restaurants)	Cook	No
		Head of Restaurant	No
		Kitchen / Cook Assistant	No
		Purchasing Staff	No
	Travel Operations	Accountant	No
		Assisting Personnel (Driver, Host, Hosts)	No
		Information Personnel	No
		Office Assistant	No
		Organization, Coordination Personnel	No
		Reservation Personnel	No
		Ticketing Personnel	No

[74] Save the Children, INGEV- 2019- Gender-Sensitive Labor Market Assessment in Istanbul - https://ingev.org/raporlar/SaveTheChildrenGenderSensiteveLMA.pdf (Last Accessed: April 21st, 2021)

Summary of Recommended Employment Pathways (continued):

Sector	Value Chain Phase	Occupation	Applicable in 2021?
Information and Communication Technology	Hardware	Technical Support Expert	Yes
	Software	Business Analyst	Yes
		Coder	Yes
		Graphic Designers and Illustrators	Yes
		Web Designer and Interface Designer	Yes
Shoes	Operations	Assembler	Yes
		Controller	Yes
		Finishing Processer	Yes
		Modelist	Yes
		Pattern Cutter	Yes
		Shoe-upper manufacturer	Yes
Textiles / Apparel	Operations	Garment Worker	Yes
		Quality Control and Thread Cleaning Worker	Yes
		Sewing Machine Operator	Yes
Textiles / Apparel / Shoes / Food Prod. / Wholesale and Retail	Logistics	Driver	Yes
		Carrying/ Handling Worker	Yes
		Packaging Worker	Yes
		Warehouse Worker	Yes
Textiles / Apparel / Shoes / Food Prod. / Wholesale and Retail / Health / Hospitality	Marketing and Sales	Cashier	Yes
		Store Attendant / Sales Representative	Yes
		Call Center Representative	Yes
		Social Media Expert	Yes

Summary of Recommended Entrepreneurial Pathways:

Sector	Value Chain Phase	Business Idea	Applicable in 2021?
Textiles and Clothing	Manufacturing	Small- scale Clothing Manufacturing	Yes
	Marketing and Sales	Small Scale Apparel Export Agency	Yes
	Marketing and Sales	Small Scale Apparel Store	Yes
Construction	Marketing and Sales	Small Scale Real Estate Agency	No
Hospitality	Travel Operations	Small Scale Travel Agency	No
	Food Services	Small Scale Restaurant	No
	Health Tourism	Small Scale Medical Tourism Agency	No
	Beauty Care	Small-scale or home-based Beauty Care Shop or Specialist	No
Information and Communication Technology (ICT)	Software	Small-scale or home-based Web Designer or Graphic Designer	Yes
		Small-scale or home-based Software Developer	Yes
	Hardware	Small-scale Technical Support Store	Yes
	Marketing and Sales	Small-scale or home- based Online / Social Media Marketing Agency	Yes
Logistics	End-User Delivery	Small-scale delivery team management	Yes
		Small-scale packaging team management	Yes

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