

Syrian Refugee Livelihood Monitor

Summary Assessment

SYRIAN REFUGEE LIVELIHOOD MONITOR

RESEARCH SCOPE

“Refugee Livelihood Monitor” which is prepared in cooperation of İNGEV and Ipsos Social Research Institute, aims to track periodically the livelihood conditions of Syrian refugees living out-of refugee camps, their overall attitude and future plans in regards to living in Turkey and their consumption and shopping behaviour.

Fieldwork is conducted between April 27th-May 20th 2017, including top 10 city hosting 79% of the refugee population - İstanbul, Şanlıurfa, Hatay, Gaziantep, Adana, Mersin, Kilis, Mardin, Bursa, İzmir- and total of 1.282 face-to-face interviews. Analysis is done for 3 main regions which are differentiated by the refugee profiles: (i) West (İstanbul, Bursa, İzmir); (ii) East (Şanlıurfa, Gaziantep, Kilis, Mardin); (iii) South (Hatay, Adana, Mersin). In addition, İstanbul which has the largest urban refugee population is reported exclusively. Besides focusing on the urban refugee population, out-of camp rural data are also included in the research.

DISORDERLINESS (BEING UNREGISTERED)

Research results show that 89% of the Syrian Refugees living out-of camps is registered. Whilst the rate of unregistered Syrian refugees was only 0,5% within 17% Syrian refugee population before 2013, it increased to 9% between 2013-2015; the rate in 2016 and beyond is extremely high and alarming. Increase mainly sourced from taking a preregistration due to security investigations lately.

Disorderliness in employment means unregistered work. There are about 650 thousand employed Syrians, working registered or unregistered. As announced by the Ministry of Labor and Social Security, number of Syrians with official working permit is around 10-15 thousand. This figure shows the rate of **disorderliness in the area of employment as about 98%**.

In order to open a bank account, Syrian citizens should have a residency certificate besides temporary protection identification. It is a known fact that besides regulations banks have differences in implementation. Credit card ownership or credit usage, on the other hand, is only possible for Syrians with high bank deposits and with a permission from the headquarters. Therefore, financial exclusion is directly related with banking implementations. **Financial inclusion** is important for the encouragement of orderliness. As expected, **financial adaptation increases by higher education level**.

SOCIO-ECONOMIC STATUS OF REFUGEES

Main source of income for Syrian refugees in Turkey is their earnings by working (85%)

Contrary to what is supposed to be, **majority of the Syrian refugees are not making a living with non monetary public support or cash aid provided by the institutions**. These aids are the regular income sources of only 6% of the households. Important differences are observed among the regions.

As a household income source, 6% of the refugees stated to get financial support from family and friends, as 3% still lives with the personal savings brought from Syria.

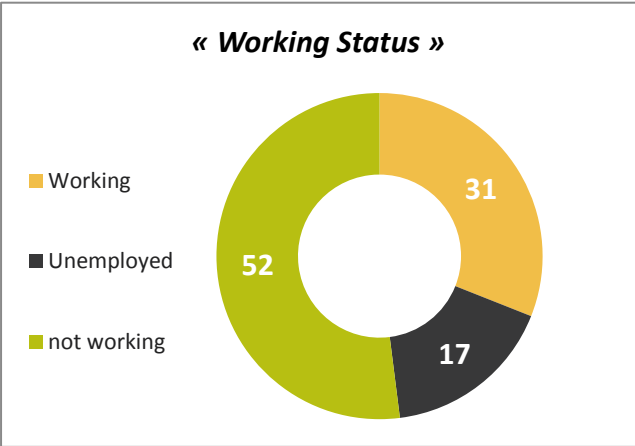
Average household size of Syrian refugees is **6,2**; average number of income earners per Syrian household is only 1,4.

EDUCATION

Education levels of Syrian refugees are significantly low. 31,3% of the refugees aged 15 and over has no formal education. Although rate of higher education is relatively lower, 21% of the refugees is highschool graduate at the least

Among our target group, only 3,4% has graduated from formal education institutions in Turkey; this rate is expected to increase in the future. As the age group gets younger, rate of having formal education increases. Due to their ages, most of the 15 years old and over age group got their primary education in Syria. Considering the lower levels of education among the refugees and having to leave their education in half due to migration, education plans for them should not only include the children.

EMPLOYMENT



Although a major part of them is unregistered, 31% of the refugees in Turkey is currently in the workforce. As 17% of the refugees in the workforce is working for a Turkish employer, 5% is working for a Syrian employer.¹ 5% is self employed, only 1% is an employer.

50% of the Syrians in Turkey is unemployed and not working for a job. Within this group 8% is not able to work due to disabilities, seniority in age or long lasting illness; 5% due

to being a student and 1% due to retirement.

According to UN data, inclusion of Syrian women to the workforce was 13% in 2010. Currently 17% of the Syrian women in Turkey is working. This indicates that **being refugee actually increases the rate of women to join the workforce.**

Refugees who have no temporary identification card are included more in the worklife. Whereas more than 35,1% of the unregistered refugees is working, 23,7% is looking for a job. Among the registered ones, 29,5% is working and 16,4% is unemployed.

¹ Among the employed, the rate of employees who work with salary is 70% (Tablo 4).

UNEMPLOYMENT

As compared with overall Turkey, unemployment rate is higher among refugees. Unemployment rate of Syrian refugees is about 17,2%. As the employment rate is over 36% and unemployment rate declines to 12% in the Western cities, it is more than 20% across Eastern cities.

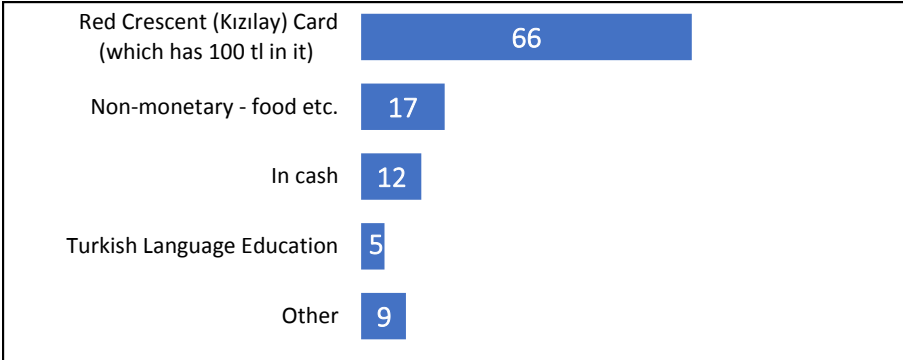
Unemployment rate among Syrian women is significantly lower than the Turkey average, it is much higher for men.

As the education level increases the rate of unemployment increases as well; this is another issue to be carefully assessed. Among the ones who has no formal education, unemployment rate is decreasing below 14%. This figure shows that Syrians can find work mostly for non skilled positions. Indeed, although they are relatively low in number, almost 34% of the refugees with higher education is unemployed.

SOCIAL BENEFITS / AIDS

Rate of getting any social benefit, on a regular or irregular basis, is only 13%. It means that **87% of the Syrians is getting no social aid** at all. This rate is even below 7% in the West (5% in İstanbul), and significantly higher in the East Region (20%).

On top of the social benefit possibilities Kızılay Card is listed. **Currently 9% of the Syrian refugees living out-of camps owns Kızılay Card.** This corresponds to **about 270 thousand urban refugees with Kızılay Card.** Within 13% of the refugees that state getting aid on regular or irregular base, 66% of them state using Kızılay Card.



LIVING AND SOCIAL INTEGRATION IN TURKEY

Risk of living as a parallel society. Rate of Syrian refugees stating to spend time with both Syrians and the Turkish people is only 21%. Syrians in Turkey socialize more with other Syrians.

Social exclusion risk. Social isolation of refugees is a serious problem; among the Syrian refugees in Turkey especially **women, old people and refugees in the Eastern cities are the most risky social groups.** Nearly one out of 5 (18%) Syrians stated not talking with anybody; it is important to understand the extent of the isolation problem.

Social adaptation and exclusion. 74% of the Syrians living in Turkey thinks they have adapted to life in Turkey. As the education level increases, adaptation rate of refugees is thought to increase.

Turkish knowledge of the refugees can still be explained by the exposure effect. Rate of refugees with no reading and writing in Turkish is above 70%. While the rate of refugees with no verbal skills in Turkish declines to 25% in the West, advanced level Turkish increases twice as much.

Social / Daily Activities. Most common daily activity among Syrians is watching Arabic TV channels. Spending time in social media is also a common activity. Among the other important activities, we can also list spending time outside with relatives and friends and visiting religious places / doing religious activities. 34% of the Syrian Refugees say they watch Turkish TV channels.

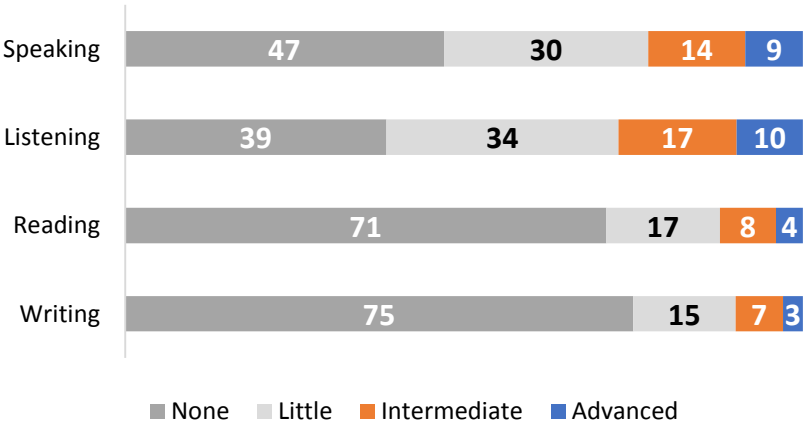
Information Sources for Syrians to Learn About Developments. 80% mentioned friends and neighbors as the source of information. Additionally, social media / internet (36%) and TV (22%) are among the top information sources.

SOCIAL ADAPTATION DEMAND AND EXPECTATIONS

42% agrees with the statement of “If I had a chance I would like to move to a European country”, whereas 44% says “absolutely do not want to move”. Demand of becoming a citizen of Turkey is common among the Syrians by 74%. 52% say “ I want my children to continue living in Turkey”. 52% state “I see mine and my family’s future in Turkey”. 64% mentions of having hope for their future. 49% say “ I see myself as a part of this Country”. **Yet, half of the Syrian refugees are having difficulties about social integration.**

Education on Turkish language, which affects every aspects of a life, should be solved immediately. There is also a high demand for religion training. Besides demand for regular education for refugee children, different courses are sought by refugees with varied education levels: vocational training, computer – technology education, English, education for entrepreneurship, courses for sports and art, etc.

« What is your level of Turkish in terms of reading, writing, speaking and understanding ? »



PURCHASING AND CONSUMPTION HABITS

Now in Turkey, there is an ethnic market that may be expected to grow continuously. As we assess the consumption habits of the Syrians, we see tendency towards buying cheaper items due to economical conditions but also see their preference for Arabic ethnic market. Top reason behind choosing the shopping place is “purchase the cheapest” (79%). Still, the secondary cause determining the consumption behaviour is the habits. 58% of the Syrians (64% in the West) says “No matter what, if I find the brand I use in Syria I always prefer that one”. Additionally, an important 70% of the refugees state that “Arabic explanation on the packages are very important for me”.