



This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# MAHİR ELLER PROJESİ



## 3<sup>rd</sup> STEERING COMMITTEE MEETING

26 November 2020 / 11.00 - 12.00 Zoom Meeting

tepav





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Living and Working Together: Integrating SuTPs to Turkish Economy

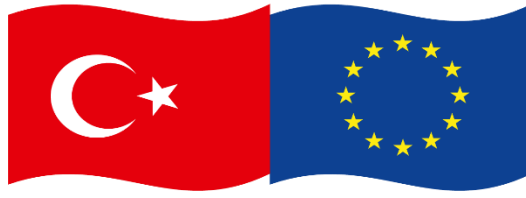
## Mahir Eller Project Impressions from the Field Study

26/11/2020  
Ankara

Şenay Akyıldız  
Team Leader

tepav





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Framework

- Aim and method of field studies
  - Supply side analysis of the labor market
    - Interviews with Syrians and citizens with temporary protection
      - In-depth interviews
      - Profiling study
  - Demand-side analysis of the labor market
    - Interviews with employers
      - In-depth interviews
      - Survey
  - COVID-19's impact on the labor market
- Descriptive statistics on labor market supply side analysis
- Descriptive statistics on labor market demand side analysis
- Difficulties related to project activities and unplanned positive results



This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Descriptive Statistics on Supply Side Analysis

tepav

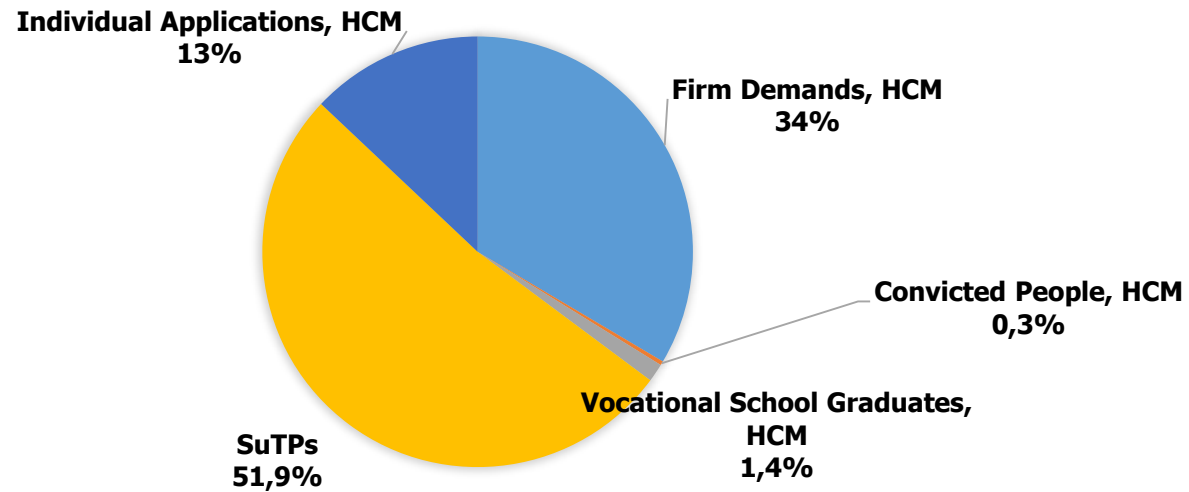




This project is funded by the European Union.  
Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## 52% of the people we have reached so far are SuTPs

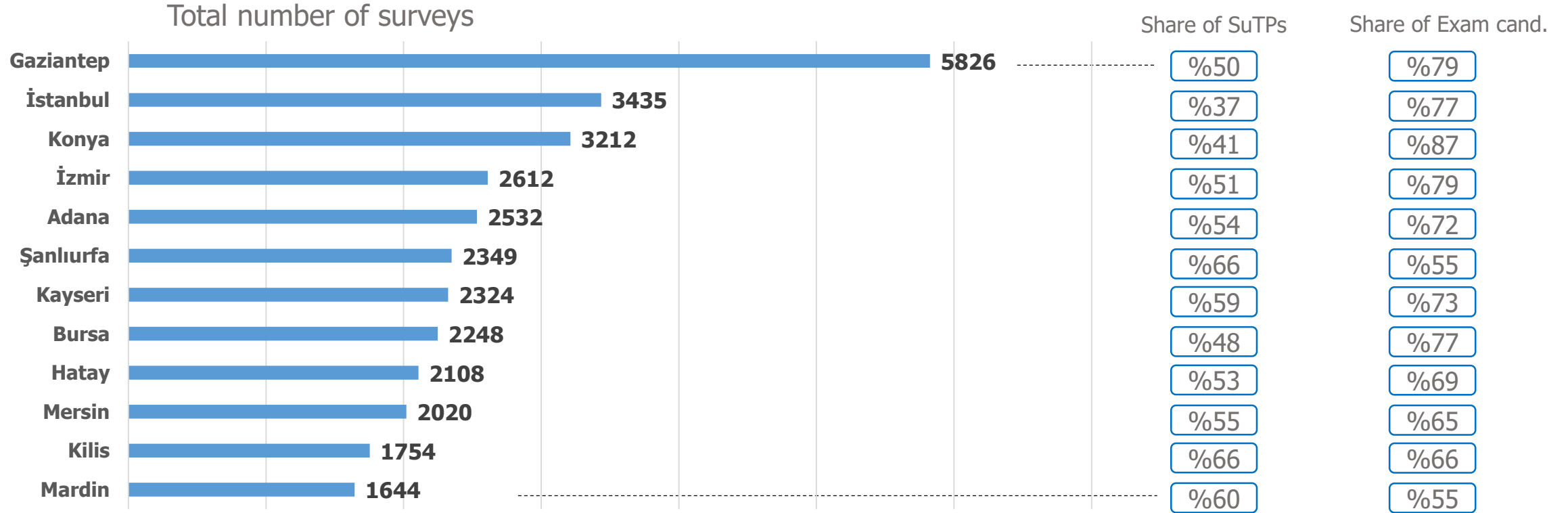
- Component A: Interviews with 6021 SuTPs (256 in-depth interviews, 5765 comprehensive questionnaires)
- Component B: 26043 Interviews with SuTPs and our citizens (Simplified questionnaires)
- Total: 32064 interviews as of 21st November 2020
- Women's representation rate was 11.3%; 13.4% for SuTPs and 9% for Host Community Members (HC)





This project is funded by the European Union.  
 Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
 هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## 18% of surveys were conducted by our Gaziantep office

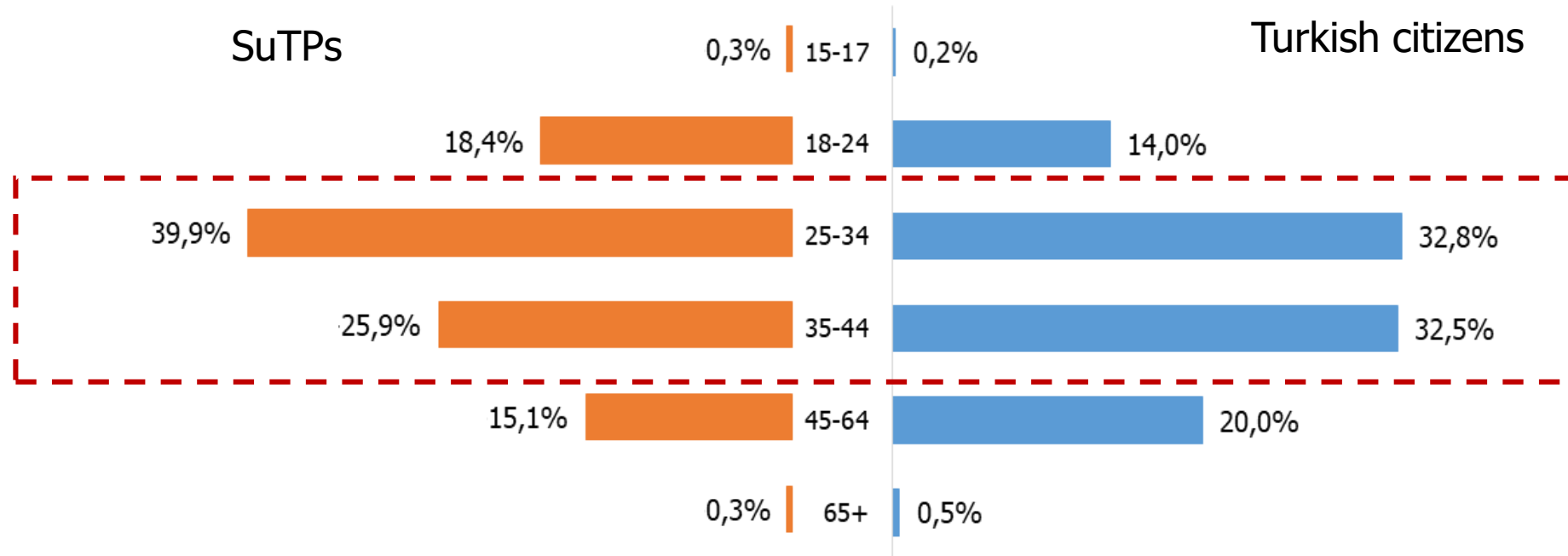






This project is funded by the European Union.  
Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## Average age of the respondents is 33.5



tepav



TOBB



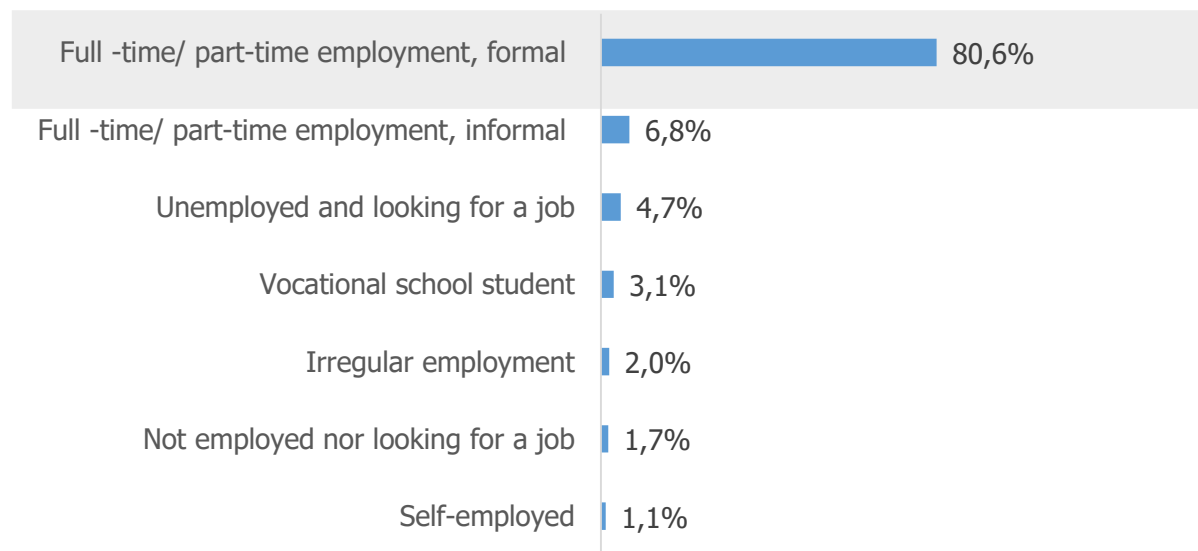
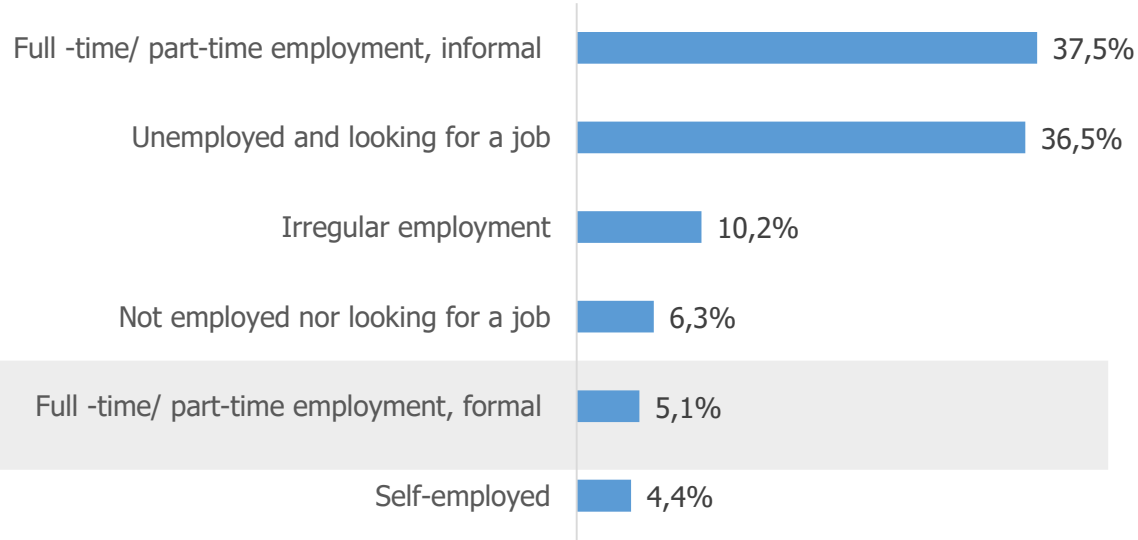


This project is funded by the European Union.  
 Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
 هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# 47,7% of SuTPs and 8,8% of Turkish citizens are employed informally

30005 observations

Turkish citizens



SuTPs

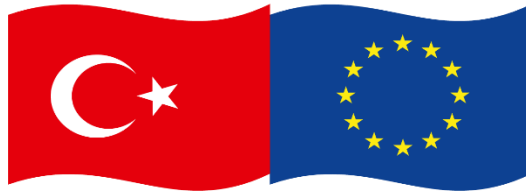
tepav



TOBB





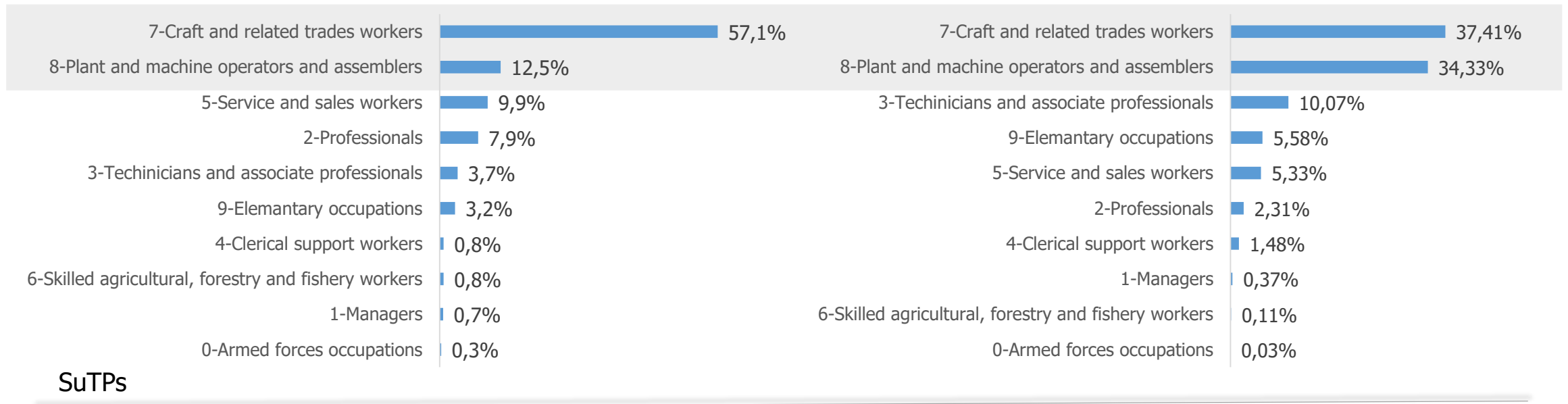


This project is funded by the European Union.  
 Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
 هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# 70% of the respondents has occupations requiring second-level skills according to the ISCO-08 classification

32064 observations; 3% of Turkish citizens and 3,1% of SuTPs stated that they do not have any profession

Turkish citizens



tepav



TOBB





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Construction, social and personal services, footwear, apparel and furniture sectors come to the fore as occupations of SuTPs

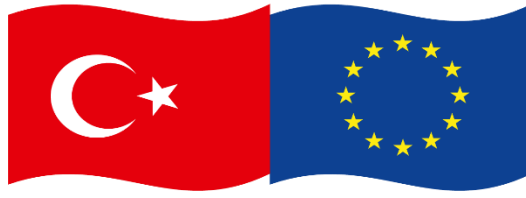
*Vocational qualifications with more than 200 observations*

Qualifications	Share in total, SuTPs
Kuaför / Hair Dresser	6,8%
Çelik Kaynakçısı / Steel Welder	5,3%
Ahşap Mobilya İmalatçısı / Wooden Furniture Manufacturer	4,6%
Elektrik Tesisatçısı / Electrician	3,7%
İnşaat Boyacısı / Construction Dyer	3,7%
Seramik Karo Kaplamacısı / Ceramic Tile Coating Worker	2,8%
Ayakkabı İmalatçısı / Shoe Manufacturer	2,7%
Sıvacı / Plasterer	2,0%
İnşaat İşçisi / Construction Worker	1,7%
Otomotiv Mekanikçisi / Automotive Mechanic	1,6%
Ahşap Kalıpçı / Wooden Molder	1,6%
Elektronik ve Elektrikli Ürünler Servisçisi / Electronic and Electrical Products Technical Service Personnel	1,5%
Duvarcı / Bricklayer	1,4%
Makine Bakımcı / Machine Maintainer	1,2%
Sayacı / Shoe-upper Maker	1,2%

- First 15 qualifications' total ratio corresponds to 42% of total surveyed SuTPs
- 35,5% of SuTPs have no qualifications suitable for VQA vocational certification or their skills & experiences are not enough to be evaluated as exam candidates

tepav





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## Transportation, machinery, automotive, apparel, metal and furniture sectors come to the fore as qualifications of Turkish citizens

*Vocational qualifications with more than 200 observations*

Qualifications	Share in total, HCMs
Şehir İçi Toplu Taşıma Otobüs Şoförü / Urban Public Transport Bus Driver	7,5%
Köprülü Vinç Operatörü / Bridge Crane Operator	7,4%
Çelik Kaynakçısı / Steel Welder	6,6%
Kent İçi Raylı Sistemler Tren Sürücüsü / Urban Rail Systems Train Driver	6,6%
Servis Aracı Şoförü / Service Vehicle Driver	5,8%
Motorlu Kara Taşıtları Alım Satım Sorumlusu / Motor Vehicles Trading Supervisor	4,8%
Sorumlu Emlak Danışmanı / Supervisor Real Estate Consultant	4,0%
Ahşap Mobilya İmalatçısı / Wooden Furniture Manufacturer	3,0%
Elektrik Tesisatçısı / Electrician	2,6%
Plastik Enjeksiyon Üretim Elemanı / Plastic Injection Production Personnel	2,5%
İplik Bitim İşleri Operatörü / Yarn Finishing Operator	2,5%
Kuaför / Hair Dresser	2,4%
Makine Bakımcı / Machine Maintainer	2,3%
NC/CNC Tezgah İşçisi / NC/CNC Machine Worker	2,0%
Otomotiv Mekanikçisi / Automotive Mechanic	1,3%

- First 15 qualifications' total ratio corresponds to 61% of total surveyed Turkish citizens
- 6% of Turkish citizens have no qualifications suitable for VQA vocational certification or their skills & experiences are not enough to be evaluated as exam candidates

tepav



TOBB





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## Overall assessment: SuTPs

- As of today, they are in Turkey and it looks like 80% will stay here in Turkey
  - %66 of those fall between the ages of 25-44
  - Higher education, higher tendency to stay in Turkey
  - I had the opportunity, but I did not go to Europe - a religion-based approach
  - Doesn't want to start from scratch in a new country or Syria
- Unskilled and inexperienced employees - neither able to attend training nor attend short-term courses
- Disinformation is too high - tendency to associate every setback with being Syrian

tepav





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## Overall assessment: Turkish citizens

- 59% of TC citizens (4178 people) who participated in the comprehensive survey stated that they know a Syrian (neighbor, colleague, employee)
- 43% of Turkish citizens, answered the question on what they feel about Syrian presence in Turkey as «It does not matter»
  - 36% of them stated in consecutive questions that they find it difficult to find work because of the Syrians.
- The rate of those who stated that they are uncomfortable with the presence of Syrians is 15%
  - 55% does not know any Syrian
  - Economic reasons -> Made it difficult for me to find a job, they do not give taxes, reason of the increased inflation
  - Cultural differences and security -> They make noise, young ones have bad habits, harassment and so on
  - Political issues -> I'm not happy they're here while their country is in war

tepav



TOBB



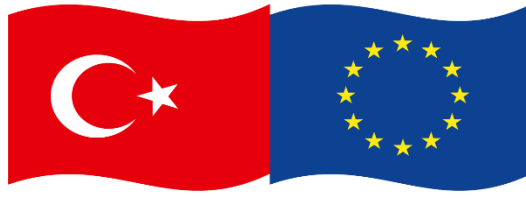


This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Descriptive Statistics on Demand Side Analysis

tepav





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Method

- In-depth interview - TEPAV
  - 75 company interviews: sectors like footwear, machinery, leather, iron casting, plastic, automotive
- Survey company was in the field b/w August – December 2019
  - 1537 questionnaires were completed by the end of December 2019
  - Data cleaning process was completed by the end of February 2020
- Sector selection
  - Filters: Average number of employees, increase in sales revenues, share in total exports, change in the number of employees
  - Control question: Are VQA vocational qualification exams available?
  - Manually adding of areas where Syrians are often observed to be working
  - Selected sectors: Food, leather, plastics, fabricated metal products manufacturing, construction, furniture, repair of motor vehicles, garment

tepav







This project is funded by the European Union.  
Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

## Most surveys were conducted with companies in Istanbul and those operating in construction sector

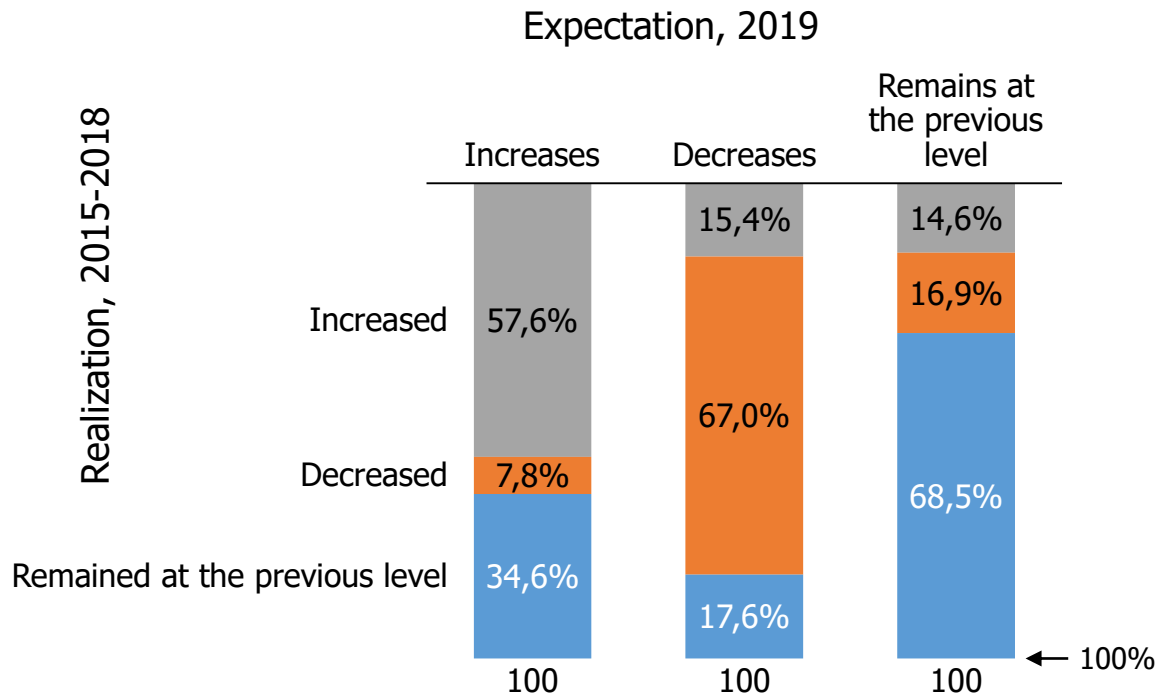
- 55.6% of surveyed companies are micro-sized
- 36.3% of surveyed companies are small-sized

Province / NACE Code - Sector	41	45	14	43	25	10	31	22	15	29	Total
	Bina inşaatı / Construction	Motorlu kara taşıtlarının ticareti ile onarımı / Repair of motor vehicles	Giyim eşyalarının imalatı / Garment	Özel inşaat faaliyetleri / Specialised construction activities	Fabrikasyon metal ürünleri imalatı / Fabricated metal products manufacturing	Gıda ürünlerinin imalatı / Food	Mobilya imalatı / Furniture	Kauçuk ve plastik ürünlerin imalatı / Plastics	Deri ve ilgili ürünlerin imalatı / Leather	Motorlu kara taşıtı, römork imalatı / Manufacture of motor vehicles, trailers etc.	
Adana	15	8	5	6	5	5	5	5	5	5	64
Bursa	28	13	8	14	12	5	11	5	5	6	107
Gaziantep	12	10	5	5	5	5	5	3	6	5	61
Hatay	11	6	5	5	5	5	5	4	5	5	56
İstanbul	259	103	104	93	71	29	26	27	18	8	738
İzmir	55	20	11	21	13	11	7	6	5	4	153
Kayseri	11	8	7	4	9	5	6	5	3	7	65
Kilis	8	10	8	5	4	5	3	5	2	2	52
Konya	14	13	5	5	5	5	5	5	5	4	66
Mardin	10	17	6	1	3	9	3	5	-	1	55
Mersin	16	7	5	6	5	6	5	5	3	5	63
Şanlıurfa	9	6	6	4	4	8	5	5	5	5	57
Total	448	221	175	169	141	98	86	80	62	57	1537

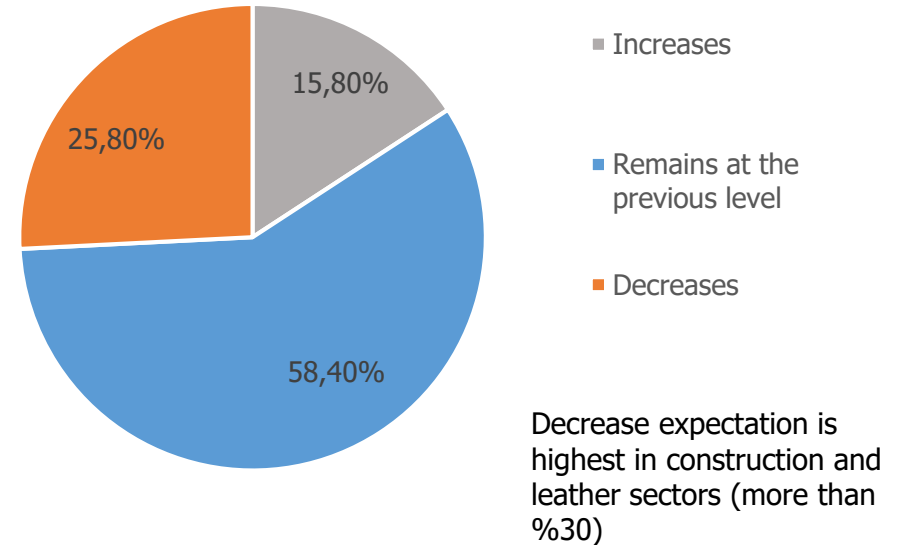


This project is funded by the European Union.  
 Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
 هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Employers are not optimistic about the future of their business



How will your company's employment capacity change by the end of 2019?



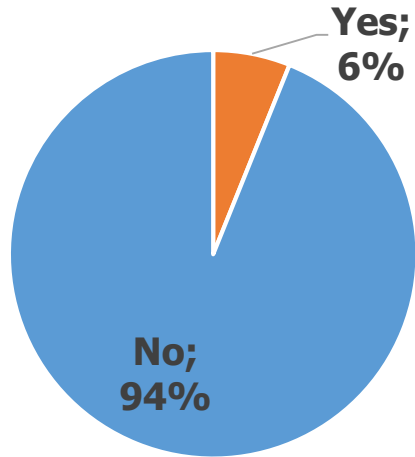


This project is funded by the European Union.  
 Bu proje Avrupa Birliği tarafından finanse edilmektedir.  
 هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

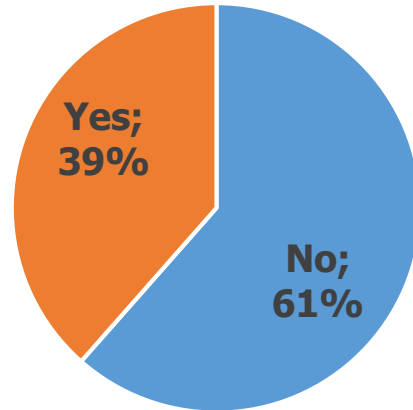
# The number of employees who already have VQA certification is quite low

- Lack of information / awareness is one of the most important reasons

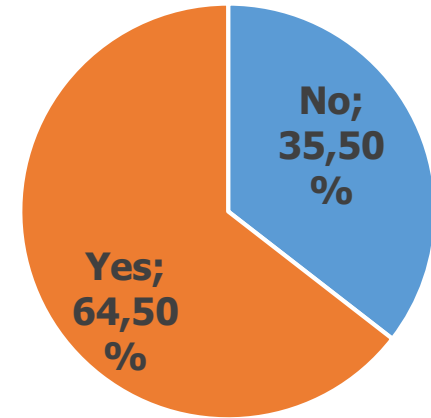
Share of employees have VQA Vocational Qualification Certificate



Share of employers have detailed information about VQA Vocational Qualification Certification



Do you consider VQA Vocational Qualification Certification as a part of your company's hiring criteria?



Experience cannot be measured by certification, having technical skills is enough, 56%

Evidence of experience and technical skills, 89%



This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Conclusion

## ■ Difficulties - I

### → COVID-19

- SuTPs have been affected more than Turkish citizens
  - 36.5% of SuTPs, 11.9% of Turkish citizens lost their jobs or taken on unpaid leave
  - 88% of SuTPs, 50% of Turkish citizens have suffered income loss
- Among the survey participants, those living in the southeastern provinces (especially Hatay, Urfa and Mardin) were more affected by the pandemic than others.
- The rate of layoffs in construction sector is higher than in the other sectors

### → Macroeconomic conjuncture

### → Lack of willingness to hire SuTPs for open positions, if any (demand side)

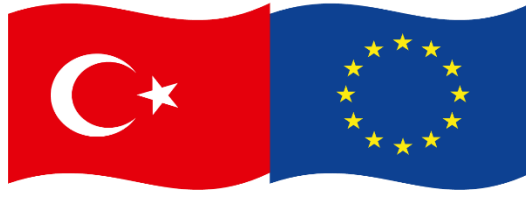
### → Lack of willingness to be employed in the formal sector (supply side)

tepav



TOBB





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# Conclusion

## ■ Difficulties - II

- Capacity of Authorized Certification Bodies
- The success rate of the first vocational certification exams is below the target (%31 for SuTPs, %46 for HCMs)
- Lack of certification in some occupations that we have received many applications
- Lack of awareness of the importance of certification
- Trainings in projects that are focused on vocational education do not get the person sufficiently ready for the labor market

## ■ Value added areas, opportunities

- At the end of the project, a significant increase in capacity will be achieved for both firms and Authorized Certification Bodies
- Opportunity to cooperate with international projects, with vocational training centers of Bursa Chamber of Commerce and Industry, Gaziantep Chamber of Industry

tepav



TOBB





This project is funded by the European Union.  
Bu proje Avrupa Birliđi tarafından finanse edilmektedir.  
هذا المشروع تم تمويله من قبل الاتحاد الأوروبي

# THANK YOU

tepav

