

In-Camp Electronic Voucher Programme in Turkey Market Price Monitoring (PMM) and On-Site Monitoring (OSM) Report Quarter 1: January – March 2020

HIGHLIGHTS

- The average food basket cost in the contracted markets in camps is 148 TRY in March 2020, 48% more than the assistance provided.
- Winter season limited the income opportunities and affected the camp residents negatively. Refugees resorted to borrowing money from others and buying food on credit in non-contracted markets.
- The quota of the electricity distributed in the camps was deemed inadequate, especially for heating in winter.
- The camp managements and markets are implementing measures against Covid-19 outbreak; beneficiaries are also complying.
- The food and hygiene items are available in the camp markets, except for Osmaniye where a decrease in the variety of items has been observed (since remedied).

Q1 Key Figures

15	Contracted shops
74	Price Monitoring Activities

Q1 2020 CONTEXT

- Following the change of the card system to individual bank accounts and WFP take-over of the entire amount of the e-card assistance in Q4 2019, the programme has run as planned through Q1 2020. In January and February, the few problems such as changing PIN codes of cards have been resolved.
- On March 11th, the first case of Covid-19 in Turkey was confirmed. Social interactions were discouraged across the country. Therefore, WFP monitoring has been conducted by monitors working from home, collecting data through phone and internet. For the PMM activities, WFP collaborated with Turk Kizilay for the market price monitoring in contracted shops starting in March 2020.
- A range of precautionary measures were taken to prevent Covid-19 in camps; management limited mobility, increased disinfection activities and implemented sensitization activities about the virus and mitigation measures.



WFP / Didem Akan Ilhan

OUTPUTS

Outputs – Q1 2020	January	February	March
Beneficiaries Reached	54,879	54,700	55,587
Total Value of Assistance (TRY)	5,487,000.00	5,470,000.00	5,558,700.00

REFUGEE CAMPS IN TURKEY – Q1 2020



1. OBJECTIVES

Objective: This report summarises all in-camp monitoring activities from January to March 2020. The market monitoring allows analysis of:

- 1) The performance of the partially restricted¹ e-voucher programme;
- 2) Current price trends in WFP contracted and non-contracted shops comparing to previous periods.
- 3) Key issues noted in shops during the reporting period and whether these issues have been resolved or are still outstanding;

Market Price Monitoring: Every month, WFP/ TK (Turk Kizilay – Turkish Red Crescent) visit the shops contracted for the e-voucher programme and a similar number of non-contracted shops for price comparison. This allows WFP and TK to monitor the programme closely, ensuring shops are honouring their contractual requirements, and that prices are following local trends.

¹ Since December 2019, WFP provides 100 TRY for each refugee at camps, with 80 TRY of it restricted for food and 20 TRY for non-food items. Previously, WFP used to provide 50 TRY only for food with DGMM covering the other 50 TRY for food and non-food items.

On-Site Monitoring: On-site monitoring activities are conducted every month during the camp visits and provide information about the context in the camps and shops, tracking any developments and changes which are relevant to refugees and have a potential impact on the programme.

This report summarises the findings of the shop monitoring activities, price analysis of key commodities, including issues noted by the field teams relevant to the programme and overall developments in the camps.

2. METHODOLOGY

WFP monitoring teams visit the camps unannounced every month, often during the week of the assistance upload. During their monitoring visits, WFP staff check the shops for:

- overall shop condition;
- availability of food items;
- quality of food items;
- prices of food items;
- issuance of itemized receipts to beneficiaries;
- shop staff practices/behavior towards beneficiaries;
- visibility of programme information material/posters;
- compliance with programme rules;
- programme awareness of shop employees;
- beneficiary feedback.

In Q1 2020, a total of 74 market monitoring activities were conducted. While WFP staff visited the markets regularly in January and February, field activities were suspended in March due to the Covid-19 outbreak. Close collaboration with Turk Kizilay (TK) enabled the collection of market price data from the contracted markets. WFP staff reached out to the non-contracted markets through phone calls or benefited from the websites of the non-contracted markets that offer online shopping. For OSM, the March data was collected through phone calls.

Number of Shops Monitored – Q1 2020			
Month	Contracted shop	Non-contracted shop	Total
January 2020	16	9	25
February 2020	13	11	24
March 2020	15	10	25
Total	44	30	74

The table above shows the number of contracted and non-contracted shops monitored during the reporting period. Many of the issues explained below are also raised internally in the Gaziantep Area Office reports and WFP's MEDs (Monitoring Evaluation Database system) to ensure programme issues are logged and tracked to resolution.

3. PRICE MONITORING

As of December 2019, WFP had fully taken over payment of the additional 50 TRY previously provided by DGMM, making a total transfer value of 100 TRY. From this, 80 TRY was reserved only for food items and the remaining 20 TRY were set as non-restricted.

Price monitoring activities help determine the average food basket cost in the camps. The standard food basket is comprised of specific commodities determined using the food consumption habits of the refugees, as explained in the Q1

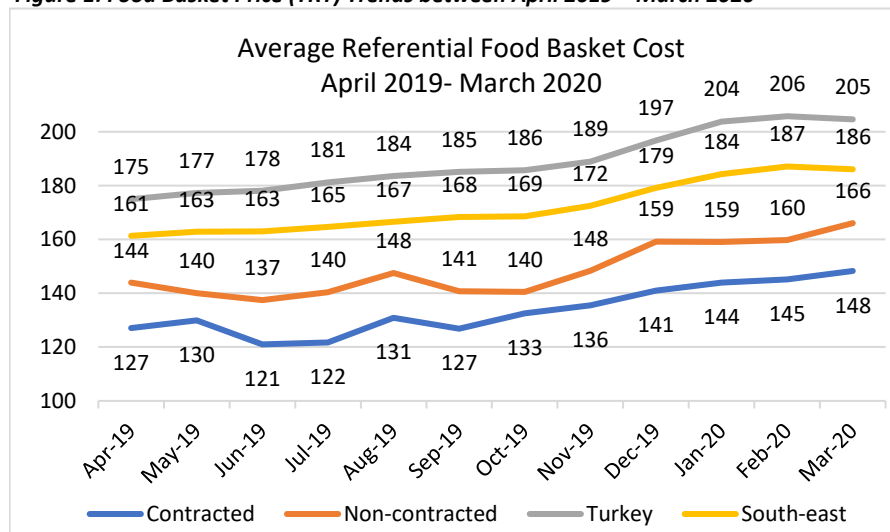
Monthly Food Basket		
Item	Quantity	Unit
Bread	7.5	kg
Rice	3	kg
Bulgur	1.5	kg
Beans	1.5	kg
Eggs	30	piece
Yoghurt	1.5	kg
White Cheese	1.5	kg
Tomatoes	0.9	kg
Cucumber	0.9	kg
Sunflower Oil	0.75	kg
Sugar	1.5	kg
Salt	0.15	kg
Tea	0.15	kg

2018 report². The food basket provides 2,100 kcal per person/day, in line with Sphere standards.

In January and February, the market monitoring activities were conducted as usual. However, in early March, due to the Covid-19 outbreak, there were changes in the methodology as mentioned above. In case some item prices were missing, the average price of the item in the given province were calculated and used instead. Alternatively, for the contracted markets, the prices from the closest markets in terms of price range was used.

The food basket cost is monitored at four levels: The first is Turkish Statistical Institute (TurkStat) data at national level (grey line in Figure 1); the second is TurkStat data for the South-east of Turkey (yellow line); the third relies on data collected by WFP and TK field monitors within the shops contracted in camps where refugees redeem their e-vouchers (blue line); and the fourth is also data collected by WFP staff, but from non-contracted shops within the camps and nearby (orange line), which serve as comparators for the in-camp contracted shops.³

Figure 1: Food Basket Price (TRY) Trends between April 2019 – March 2020



² The details can be found here: <https://reliefweb.int/report/turkey/revising-food-basket-minimum-expenditure-basket-analysis-calculate-realistic-cost>

³ TurkStat data is collected for higher quality products/brands, reflecting Turkish preferences: http://www.turkstat.gov.tr/PreTablo.do?alt_id=1014#. WFP price data is collected for the commodities selected by refugees - usually the cheapest brands available.

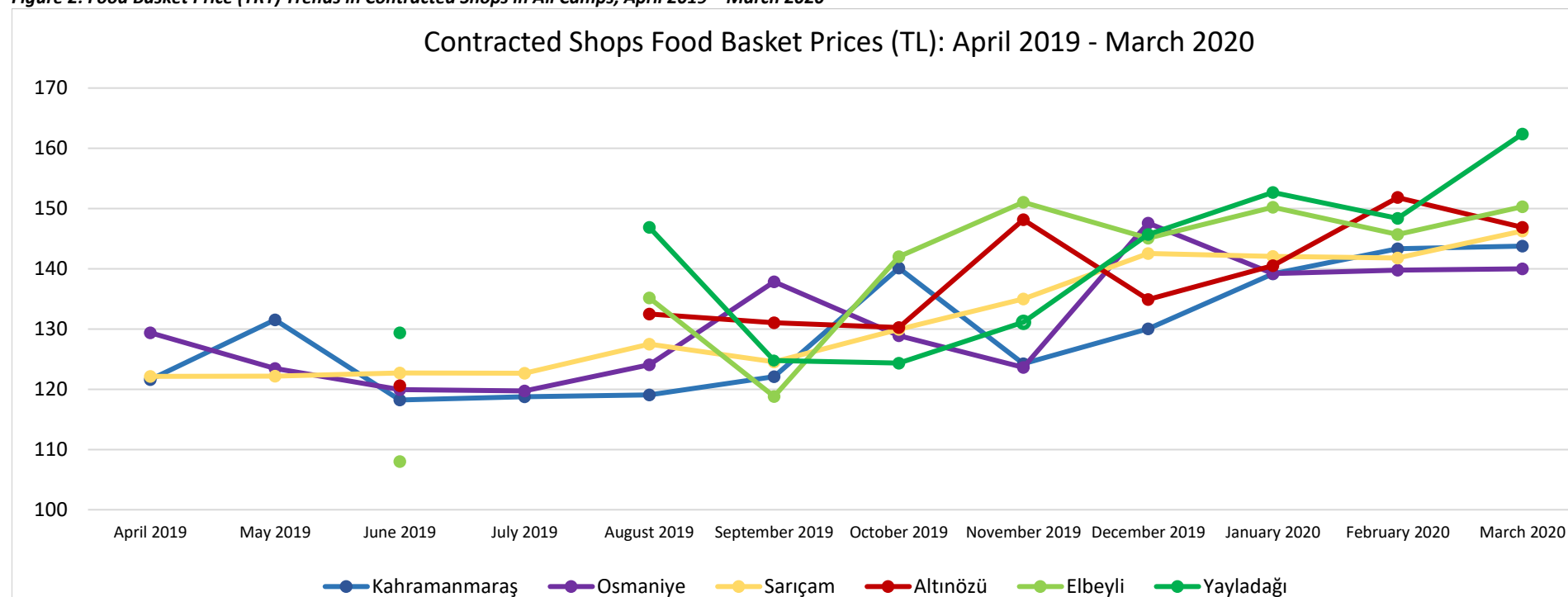
After a considerable increase in Q4 2019, the Food Basket price in Turkey and the South-east remained stable through Q1 2020. However, there were small price increases at contracted and non-contracted shops in the latter part of Q1 2020. The average Food Basket cost in the camps, including both the contracted and noncontracted shops, was 151 TRY in January, 152 TRY in February, and reached 157 TRY in March 2020. Between February and March, the food basket cost increased by 3 TRY in contracted shops compared to 6 TRY in non-contracted shops. The inclusion of other non-contracted shops (in addition to those regularly visited) due to the change in the data collection modality may have played a role in this increase. This will be further examined using Q2 2020 monitoring data.

The food basket cost in the contracted shops over the last 12 months is shown in **Figure 2**. Except for Yayladağı and Elbeyli, the price range in the other camps started to narrow down in March 2020, converging between 140 TRY and 147 TRY. The contract for one of the cheapest markets in Yayladağı camp expired in March

affecting the average price for the contracted markets. However, March food basket prices in the contracted markets should be viewed with caution as the data excluded tea and bean prices which are part of the food basket. The average prices of these items in the non-contracted markets were used in the calculation, as the items and the brands offered by the shops and preferred by the refugees might differ.

To calculate the kilogram price for bread, the weight of the Arabic pita bread packages is taken into account. Previously the packages were 825 grams on average, yet, in Q1 2020, with the recent information provided by the field monitors, the weight of the average package was 700 grams. Therefore, the bread prices were calculated based on this recent update. Turkish style bread loaves continue to be considered as 230 grams per loaf where Arabic bread is not available.

Figure 2: Food Basket Price (TRY) Trends in Contracted Shops in All Camps, April 2019 – March 2020



4. ON-SITE MONITORING

Administrative/ management issues

Camp populations

As of January 2020, families that left for Eid holidays had returned to the camps. There were also returns of seasonal workers to the camps in January and February given the lack of jobs during the winter season. In March, Adana camp management re-admitted around 1000 people who had previously been dropped from the system as 'non-returnees', having exceeded the permitted for period staying off-camp; this was explained by losing their jobs due to the Covid-19 outbreak.

In Kilis, two men whose IDs were registered in the camp but had been residing in Istanbul until the stricter ID control were not readmitted to the camp; when asked, TK staff stated that only the Provincial Governor can give permission for readmission.

Five families that had left Malatya camp when it to live in Malatya city centre were admitted to Kahramanmaraş camp as they were not able to cope with the off-camp living conditions.

On the other hand, 2 families in Kilis and 100 People in Osmaniye, opted to leave and settle off-camp and were provided with information about the ESSN.

E-card related developments

In Kilis, in January, TK officers in the camp checked all the family lists and detected 58 individuals in different families who were not registered in the camp management system. TK took action to register them and they started benefiting from the e-card assistance in February.

Following the switch to the individual card system for this camp assistance, Halkbank staff were assigned to the camps to help beneficiaries with password management and prevent the risk of misuse in case of loss or theft. The bank staff were assisted by TK staff and the camp management made frequent

announcements. Despite this, few households changed their passwords, and it was observed that some residents scratched off the last four digits on the cards as a preventive measure, as these were the default passwords. In March, the Halkbank POS machines were enabled to change the passwords if needed.

The refugees stated they would prefer to check their balance on the POS receipts as it was before the new card system, indicating that the new method (calling 168) is possible but inconvenient.

Electricity supply

Camp residents in Kahramanmaraş and Kilis reported issues in electricity supply. In Kahramanmaraş, this was resolved following the Deputy Governor's visit in January when he ordered an increase of 25 KW per container. The issue however persists in Kilis, affecting beneficiaries' ability to heat the containers during winter.

In-kind assistance

In Kahramanmaraş, 150 food baskets were distributed to the widows, elderly, and people with disabilities in late December 2019. In January, some 225 boxes of food and hygiene items were delivered to the most vulnerable by Turk Kizilay (TK). TK also distributed 10,000 pairs of socks to the residents. Camp management delivered blankets and rugs to the families in need. In February, TK distributed 9,450 small packs of milk to schools in Kahramanmaraş camp and 4000 in Kilis camp. In March, in Kilis, Qatar Charity provided 1550 food baskets, which was enough to cover the entire camp. TK also started delivering 2 food baskets and 1 hygiene kit per family, starting from those who have issues with e-cards.

In Kahramanmaraş, TK reached out to WFP's protection unit requesting wheelchairs for 10 disabled persons. WFP contacted Dünya Doktorları (Doctors of the World) who accepted to support this request and delivered 5 wheelchairs in March 2020. Upon the camp management's request, the NGO also agreed to provide 50 commode chairs for the disabled and elderly based on reports proving their need.

Camp Facilities

In Kilis camp, each household can only use the washing machines in the camp once a week. The residents stated that this is not enough for their families and they end up handwashing. The issue will be followed up with the management.

Shop regulations, conditions and maintenance

Regulations

In Kilis camp, the market staff used to permit underage children to use the e-cards, which gave rise to issues about the purchase of items without the knowledge of their parents. Residents were thus reminded via an announcement about the age restrictions on use of the card. The children of the disabled or elderly were provided with a permit by TK to do the shopping on behalf of their households.

It was found that market staff were sometimes using POS machines for banks other than Halkbank, resulting in blocked e-cards. Affected refugees would then need to go to the Halkbank branch in the city centre to unblock their cards resulting in a loss of time and money. In Kahramanmaraş, the market management acquired new Halkbank POS machines which were due to be installed after the monitoring visit.

Shop Conditions

In Kilis camp, in January, the market was very cold as the management did not turn on the heating. The market staff were warned verbally by WFP staff and no further issues were detected in the following visits.

Kilis market staff had also noted that refugees now buy more fresh products since the shops started to sell these items loose rather than packed. However, while there were no issues with availability of food items in Kilis, in Osmaniye some residents stated that they could not find what they want and buy whatever they find to finish their credits. The hygiene items are available on the shelves, yet there was not any particular increase in purchase reported.

More cashiers were recruited in Kahramanmaraş in February to resolve the problem of crowding that had been a running issue.

Availability of food items

There were no food availability issues in the markets reported in Q1 2020. In January, Kilis BIM changed the bread supplier and the beneficiaries are happy with the quality of the bread from the new company.

Purchasing power

The refugees in the camps stated that their purchasing power has greatly deteriorated. The current food basket cost in the contracted markets (148 TL) is 48% more than the actual assistance provided (100 TRY) which they also use for non-food items.

Since there are fewer job opportunities in winter, refugees resorted to coping strategies such as spending from savings, borrowing money from relatives and friends, or buying part of their groceries from non-contracted markets on credit. A few people also mentioned having sold their cell phones for cash to meet urgent needs. During conversation, refugees said they rarely consume meat, chicken or fish as they are not affordable. Instead, consumption of bread has increased as it is cheaper and filling.

Some camp residents go outside the camps daily to earn cash and meet their needs. In Kahramanmaraş camp, for instance, around 3000 people work off-camp. However, the elderly and small households struggle more than the others as they do not have working members and rely on the assistance they receive. One household in Kahramanmaraş stated that with their assistance they can only buy a pack of tea, a small bottle of oil, as well as the sugar and bread they consume in a month.

In Kilis, the camp residents were happy that they were permitted to run small scale businesses within the camp and generate income during the winter.

Covid -19 impact in the camps

After the first case of the Covid-19 pandemic was confirmed in Turkey on March 11th, a range of preventive measures were taken in the camps including: disinfection of facilities such as health centres, schools, mosques and markets; disinfection of containers; provision of masks for the staff; suspension of new

admissions and visits to the camps; reduced mobility of residents in and out of camp with a change of exit and entry hours from 9:00 - 22:00 to 9:00 - 17:00; body temperature checks at entry and exit points; and general information to beneficiaries to raise awareness through flyers, mukhtars, and others.

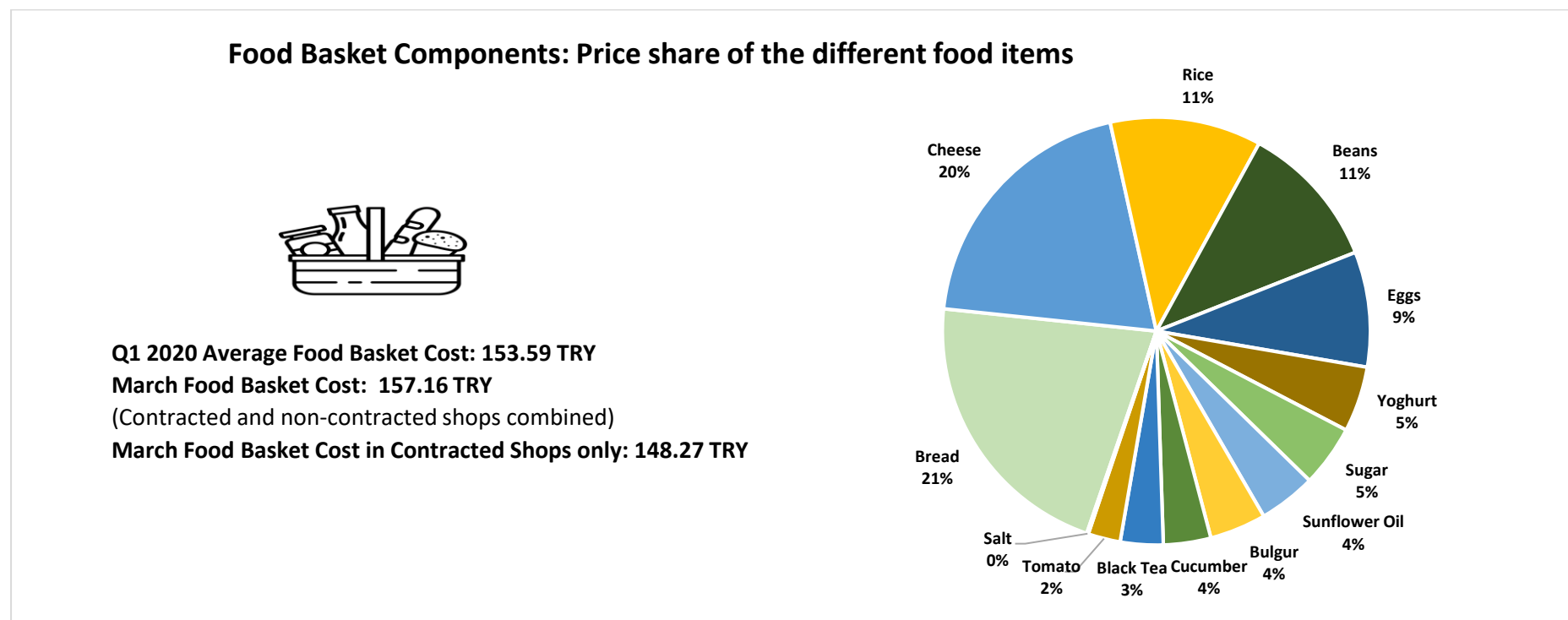
Camp managers stated the need for hygiene and protection materials such as masks for camp residents to ensure adherence to prevention measures in place. Accordingly, WFP was requested to support with hygiene kits for beneficiaries. These were distributed in Q2.

The markets are implementing social distancing rules; in Kilis camp market, which is quite large, only 80 people are allowed in the market at a time. The number of cashiers were also decreased as a precautionary measure. Unlike the off-camp markets open for shorter periods, the working hours remained the same in the camps. In Adana, hand sanitizers are offered by the market at the entrance, and market staff clean the market with detergents even more frequently.

ANNEX 1: WFP REFERENTIAL FOOD BASKET COMMODITY PRICES, Q1 2020

The food basket is designed to be nutritionally balanced, corresponding with the consumption habits of the refugees in Turkey, and for the most affordable cost possible. Conventionally, bread had the highest cost share (21%) among the food items in the food basket. The cost share for cheese (20%) is close to the share of bread. The share of rice and beans are both 11%, followed by eggs (9%). The five top items reflect a dietary diversity.

Figure 14: Percentages of Food Basket Components and Total Food Basket Cost

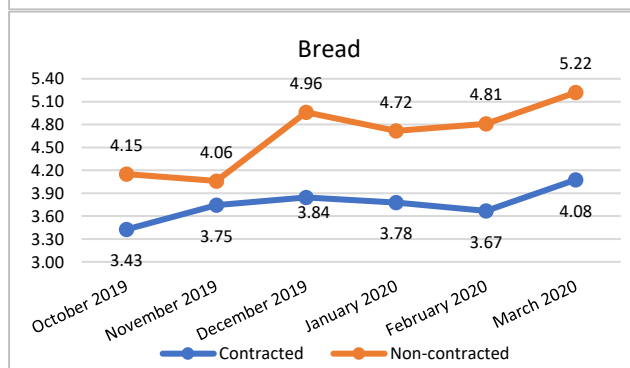
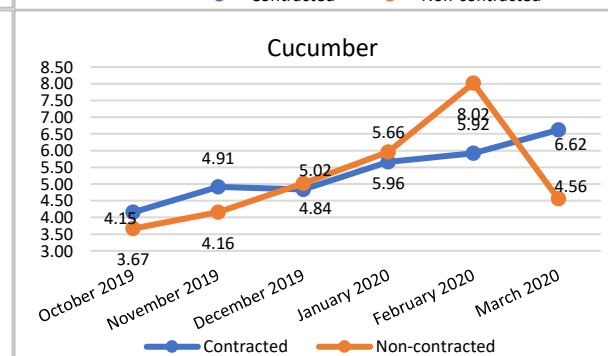
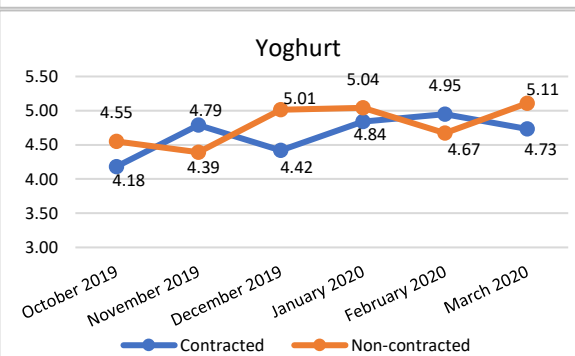
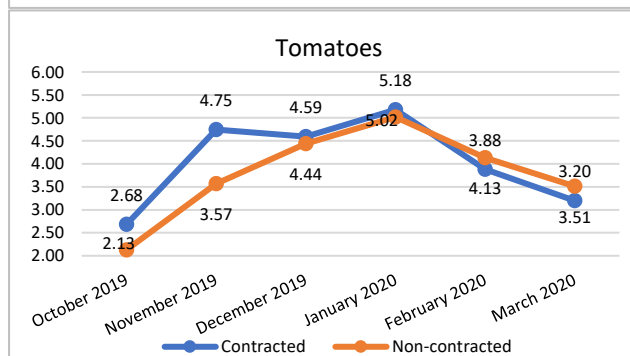
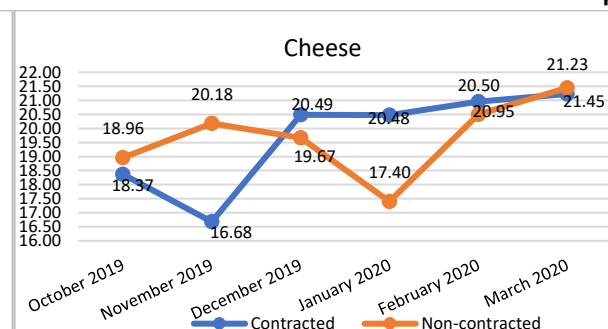
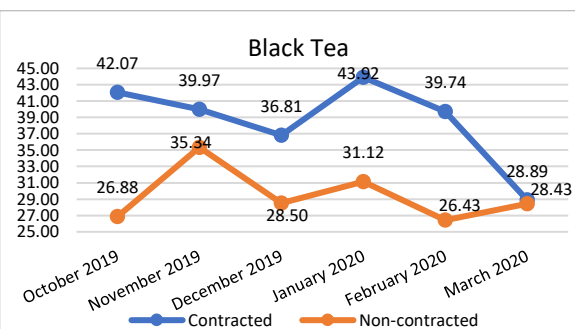
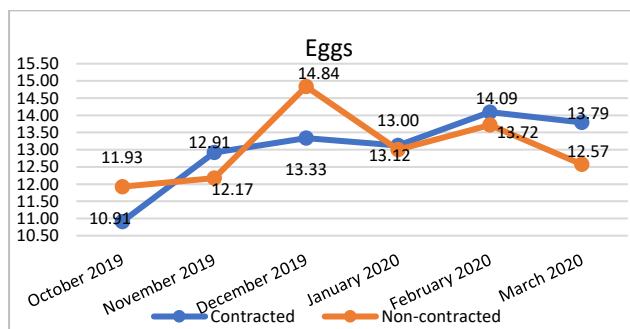


Below are the price trends for each item in the food basket for the last six months. In Q1 2020, there has been some fluctuation observed in the item prices. While the prices in both contracted and non-contracted markets were close to each other, at the end of Q1, the prices of bread, rice and salt were quite higher in the non-contracted markets. The high bread prices are due to the availability of only Turkish bread in the non-contracted markets, whereas the rice and salt might be a result of selling different brands. Cucumber and eggs were the only items that are more expensive in the contracted markets than the non-contracted.

Kızılay's market data was used for March 2020. But they do not collect data on the bean and tea prices. The figures below reflect the average cost in the non-contracted markets for these items, except for two contracted markets reached through phone. TK will include those items in their list for the future monitoring visits.

Figure 15: Divergent price trends (TRY/Kg) for WFP Referential Food Basket items in contracted and non-contracted shops





For More Information



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