



**Labor Market Assessment and Mapping of Şanlıurfa
(COVID-19 Integration with Needs)
Key Findings Report**

Orange – MEAL Department

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Orange's Monitoring and Evaluation Department – January 2021

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I. Executive Summary

Orange elaborated a labor market assessment (LMA) to identify and analyze the economic opportunities and challenges within the scope of future livelihoods projects in Şanlıurfa. The purpose of this assessment is to collect sound quantitative and qualitative data and information on the state of the economy in Şanlıurfa, the recruitment preferences and practices of employers in the region, and the skills required for youth seeking employment. It is highly recommended to read the entire report and approach with a holistic view in order to have a perfect analysis level.

For this comprehensive assessment, the LMA conducted interviews and used desk research that includes public reports of organizations and institutions, and academic publishes. It is expected that the findings and recommendations analyzed in this assessment will be used as a basis for strengthening ongoing and future livelihood programming projects. The importance of the labor market assessment at this point is to create an analysis combination between market demands and the current labor market. It is also a highly remarkable fact that this add value to employers who are willing to hire and retain skilled vulnerable community members and become partners in trainings and support efforts.

The key findings of this assessment elaborate that the Covid-19 pandemic changed everything at every step of life negatively; and reversed all the expectations in terms of economy and labor market. Many expertized reports moot that an economic contraction took place globally and the negative effects of this process will last in the following year as well. In Şanlıurfa, most of the Syrian and Turkish citizens indicated that their income has declined. However, this process of the Covid-19 opened and revived a new way for labor market. Increasing and uncovered huge demand paved the way for local producers to improve their capacity. Especially, there is a huge demand for hygiene and medical products (sanitizers and facemasks), medical products, food and agriculture. Following livelihood and entrepreneurship projects could be directed in these sectors since there is a level of demand.

The general outlook in the market of Şanlıurfa, excepting the ongoing negative facts of the Covid-19, demonstrates that is in a progress. Especially, the sectors of manufacturing, construction, agriculture and textile are in capacity development. However, despite the fact that there are many sectors progressing, it does not carry the labor market along with this progress. There is a huge skilled and qualified labor demand in the sectors. The gap between qualified and non-qualified workers is remarkable, which attracts attention to the importance of education and trainings.

The LMA reports the importance of education and the necessity of trainings throughout Şanlıurfa labor market. Bringing the qualified workforce into Şanlıurfa labor market is the answer to what will be the most useful action taken. Therefore, trainings and workshops under livelihood projects are the most vital important activities that matter for the achievement of development.

The LMA obtained a substantial perspective by conducted interviews with aspirant entrepreneurship, private work owners, and executives of organization and institutions. The outcomes of these interviews showed parallelism with the outcomes of desk research. The biggest challenge of aspirant entrepreneurship was finding the capital while it was the skilled labor for private work owners. For this reason, the aspirant entrepreneurs must be supported financially since in general, it will provide capacity development and employment to Şanlıurfa labor market.

The assessment finds the prospects of the labor market in its current position are closed to unfavourable due to the Covid-19. However, as mentioned above, there are possible areas to create a positive outcome in terms of labor market. Supporting the vulnerable communities by providing trainings are considered as necessary. The network between organizations and institutions will be very useful to achieve this task. The LMA also investigates the fact that the analysis conducted has limitations due to the Covid-19.

II. General Overview

The general consequences of the Syrian crisis in Turkey remain in terms of size and complexity. The country holding the largest number of immigrants; successful steps have been taken in terms of cohesion, education, health and livelihood with the joint efforts of many organization and the state. However, despite this, there are still extensive problems in many issues. The uncertainty regarding the future of immigrants constitutes an important concern. The economic troubles faced by Turkey recently causes more difficulty for Syrian immigrants.

As its name could be seen everywhere now, Covid-19 pandemic has profoundly affected Turkey as well as the entire world. The negative conditions brought by the Covid-19 pandemic could be considered as the main reasons for recent troubles in economic activities. Although sectors such as hygiene and food have turned this crisis into an opportunity, the effects of the pandemic are felt in general and it caused a type of economic recession.

What Turkey's economy has experienced in the framework of macroeconomic problems in the last period have enhanced to be felt ever-increasing in real life day by day. According to a report published by the World Bank, the negative effects caused by the Covid-19 are expected to continue to adversely affect in 2021 as well¹. Unfortunately, general inflation anxiety and the increasing unemployment rates are started to affect the immigrants more who were already experiencing these problems at the place.

When it is focused at the Şanlıurfa, which is within the scope of this assessment, we can see the same outcomes under the shadow of developments mentioned above. The economic contraction caused by the Covid-19 has also negatively affected the business sectors in Şanlıurfa. Nevertheless, the circumstance has provided an advantage to developing regions due to supply shock, especially since the production of intermediate goods of large production mechanisms at global and national scale was disrupted. In particular, the hygiene, food and textile (especially face-mask production) sectors in Şanlıurfa have partly benefited during the period in reaction to excessive demand. However, within the scope of the measures implemented by preventing the spread of the Covid-19, many small and medium-sized enterprises temporarily shut down which created economic difficulties for individuals. In addition to this, due to the Covid-19, the low number of visiting tourists which constitute an important income for the local community also affected these enterprises².

In other respects, many incentives, events and new business channels are created in order to support employment and encourage entrepreneurship against these current adversities. Particularly, these livelihood supports, and incentives include the immigrants in the region. At the same time, many NGOs and institutions provide trainings and supports for entrepreneurship for MSMEs, as Orange Organization does, in order to leverage the development and livelihood of the region.

If the negative outlook caused by the Covid-19 is neglected, there are developments in agriculture, textile and industry at a general level in the region. In particular, the agricultural sector meets the country's many materials needs. In addition, textile-based raw materials also contribute significantly to the development of the region. Although the textile sector is an important source of employment, the sector demands qualification in some fields (such as in the production of gloves for firefighters). The business cycle in the Şanlıurfa region also has started to keep up with the changes in the business world, following the updates with the extraordinary situation brought by the Covid-19, and started to implement these online-based developments such as increasing usage of e-commerce.

¹ The World Bank, *Turkey Economic Monitor*, August 2020, p.87

² Şanlıurfa Chamber of Commerce and Industry, *2019-2023 Strategy Plan*, 2019

III. LMA Approach and Methodology

3.1 Objectives of the LMA

The Labor Market Assessment (LMA) aims at this study to achieve key objectives below:

- Analyze the demographic, economic, and labor market structure of Şanlıurfa,
- Identify the negative effects of Covid-19 on Şanlıurfa,
- Identify a current sustainable growth opportunity in business sectors and employment trends,
- Analyze current employment practices and skills demanded by the local labor market,
- Analyze the main obstacles faced by both Syrian and Turkish MSMEs and beneficiaries.

3.2 Overall Approach and Methodology

The elaboration of this labor market assessment is expected to brief future Livelihood initiatives and TVET projects, including the selection of initiatives, and support for entrepreneurs, MSMEs and cooperatives. The LMA is formed by two core principles:

Market Driven: This assessment exercised a market-driven paradigm in order to identify possible growth and temporary employment opportunities by analyzing the economic outlook and employment of the region. Hence, the findings of the assessment could be a marker on mapping the proposed livelihoods programming. Secondly, the LMA includes an analysis of the job skills of the current labor force and those sought by employers. By this analysis, the assessment ensures that the project's design is shaped by an understanding of the market dynamics that could impact vulnerable communities in their willing of sustainable livelihoods.

Community-Led: Orange Organization has worked with local government agencies and local stakeholders to conduct key informant interviews, gather data and information, and identify local businesses to survey. These practices have ensured the accuracy of future programs to be linked with the needs of the target beneficiaries and the reality of the local market. Additionally, these practices authenticate the interests of employers and employees in terms of vocational training and job placements.

3.3 LMA Tools

Orange utilized multiple tools in order to achieve the objectives of the LMA:

Market Investigation Tools/Desk Research:

Market Investigation Tools provided many information and data for the LMA to elaborate a sound analysis of Şanlıurfa's general outlook on the economy and labor market. Moreover, this tool ensured a comparative analysis to reach the most accurate outcomes. Inside this tool, many reports from public and private institutions and academic publications are taken into consideration and harmonized with the data generated from the survey and interviews. The process of this tool is dominated by desk research.

Business Survey:

The LMA aims to reach an accurate outcome in order to take efficient actions in the ongoing and future livelihood projects. For this reason, this tool provided to capture the perceptions of dynamics in the local businesses and determine opportunities for short-term employment and job placements. Along with market investigation tools, this tool advanced for identifying high potential growth sectors by qualifying their possible contribution to labor market. Thanks to this, the LMA has formed opinions to identify the skills and characteristics that are most desired by employers.

Key Informant Interviews:

In order to determine the larger market environment for employment and self-employment, as well as gathering rich, qualitative data on opportunities for program linkages; we developed key informant interview questions that were administered to the aspirant entrepreneurs, the private sector work owners, and the executives of local and international organizations and institutions. However, due to Covid-19 pandemic, the number of interviews were held low.

3.4 Constraints of the Study

The following points highlight some constraints of this study:

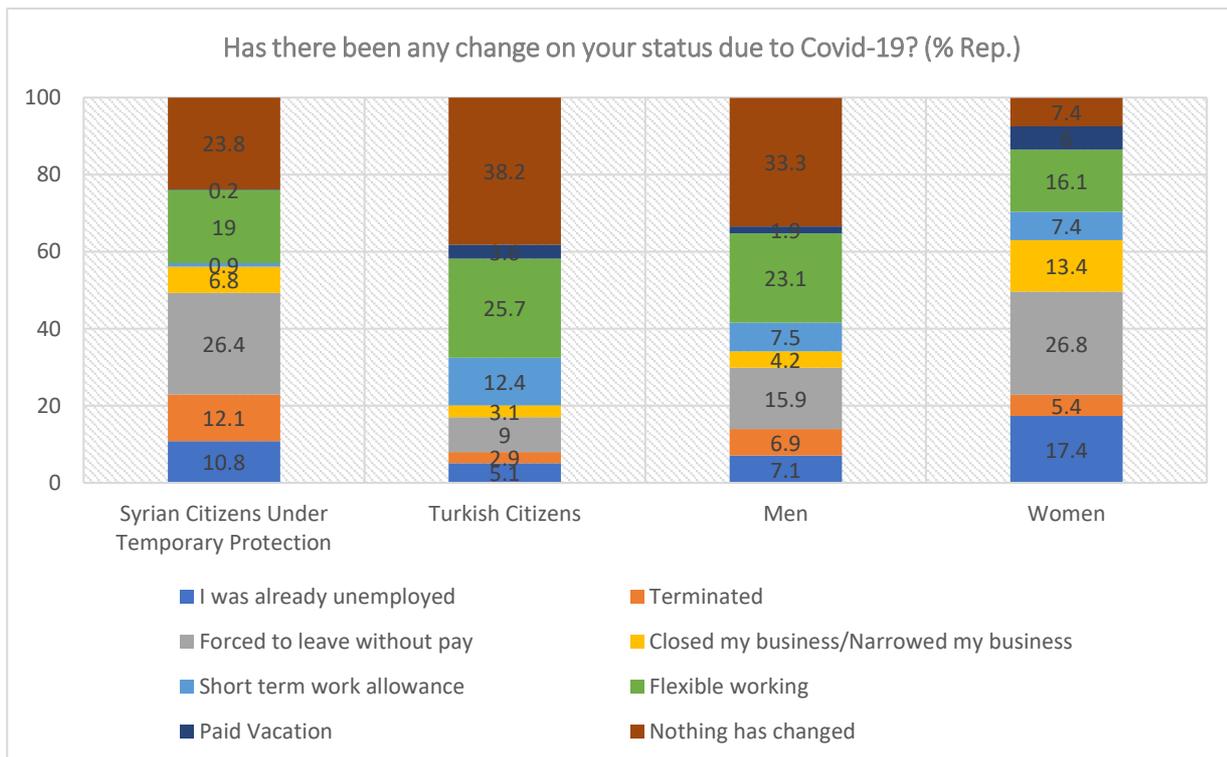
- Obtaining the current and most updated data is dependent on reports published by State Institutions,
- Having troubles on findings specific data for Şanlıurfa basis,
- Lack of most updated data about Covid-19 effects for labor markets,
- Also, fieldwork of this assessment was limited to avoid putting anyone at risk due to the Covid-19.

IV. General Effects of Covid-19

Covid-19, which first appeared in Wuhan, China in December 2019 and caused the World Health Organization to declare a pandemic in March 2020, changed the political and economic priorities of almost all countries in the global context. After the pandemic, protecting public health and preventing the spread of the disease was the priority for all countries. However, it has been inevitable that while social distancing measures taken for this purpose has slowed down social and economic life and has stopped activities in some sectors altogether.

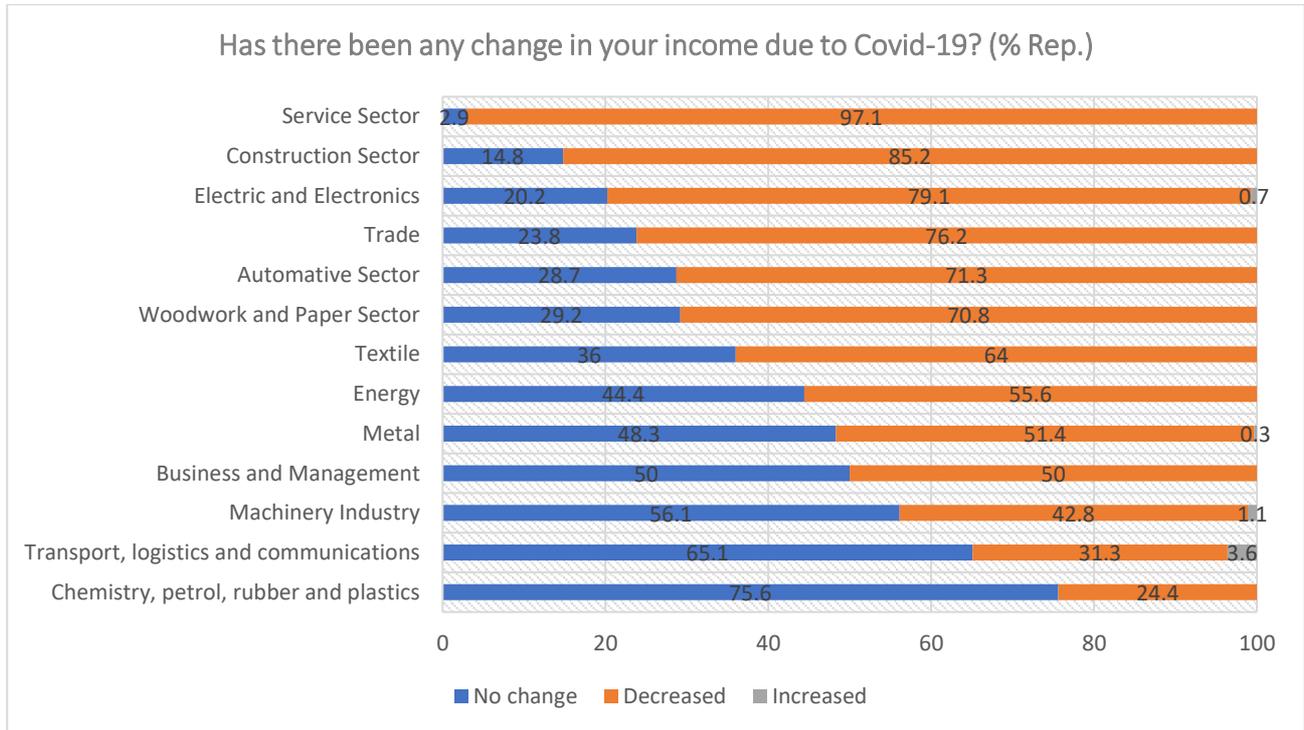
The effects of Covid-19 on global, and thus local as well, economy is ongoing and still distinguishable. The negative effects of Covid-19 measures on domestic demand and global economic slowdown due to pandemic have pulled down the economic growth in Turkey and have been increased the unemployment. For this reason, the LMA took this very subject to the focus in order to analyze the ongoing and aftereffects and to identify risks for livelihood programming.

It is highly remarkable that negative outlook is remaining in the labor market as well. According to a relevant report published by TEPAV, Syrians compared to Turkish and women compared to men have become more fragile in general of Turkey within this period. It can be observed that the disadvantaged position of Syrians in the labor market has become more evident³.



³ TEPAV, "How did Covid-19 affect labor market?", (Original; Covid-19 işgücü piyasasını nasıl etkiledi?), June 2020

The report consisted of the analysis of a survey that was conducted among 3033 Syrian (1031) and Turkish (1732) citizens. The results, published by TEPAV, demonstrate a bare fact that the most affected communities during the Covid-19 have been Syrian Citizens under temporary protection and women. This report published by TEPAV has a very important place in analyzing the current status of labor market by sectors and regions. According to the same report, most revenue loss has occurred in Şanlıurfa and Hatay. Unfortunately, %91,7 of those who attended to survey in Şanlıurfa indicated that their income has declined while this follows around %60 in the other cities except Hatay. Another important indicator in the report reveals the impact of Covid-19 on sectors. As it could be expected, the income loss has happened mostly in the service sectors due to measures taken against the Covid-19 such as the temporary shut down for cafés, restaurants, barbershops etc. Among the sectors, this is followed in turn by the construction sector, electric and electronic sector, commercial, automotive sector.



Source: TEPAV, “How did Covid-19 affect labor market?”, (Original; Covid-19 işgücü piyasasını nasıl etkiledi?), June 2020

There are somehow uplifting developments in the sectors as well. Disruption of large productions and the lack of capacity to meet the huge demands directed the market to develop regions, even though the general framework of business sectors as well as labor market seems negative. Especially, in this period, sectors such as pharmaceutical, medical devices, chemistry, hygiene products, food and agriculture have become crucial⁴. Demand on the products of these sectors has increased highly which paved the way for capacity development for these sectors. It is no secret that increase of capacity in these sectors will bring new business opportunities which could bring with employment opportunities. On the other hand, this period has underlined the importance of Vocational Education and Trainings since it was indicated by Tepav’s report that income loss was low among those who have Vocational Qualification Certificates.

The biggest problem within this condition created by Covid-19 is the uncertainty of the future. Vagueness over the question of when Covid-19 will come to an end is a matter in question, without any answer yet. That being the case, people have shown the tendency of savings which affects local MSMEs negatively. Planned investments, projects and events have mostly delayed to uncertain “near” future. This unfortunate situation has two important fold in terms of labor market. First, the sectors which had a chance to turn the crisis into

⁴ SETA, “Economy’ Struggle Against Coronavirus”, (Original; Ekonominin Koronavirüsle Mücadelesi), 2020

an opportunity can provide short-term employment in case of increasing capacity development. Secondly, if the normalization process can take a sustainable stage, things can go back to normal slowly.

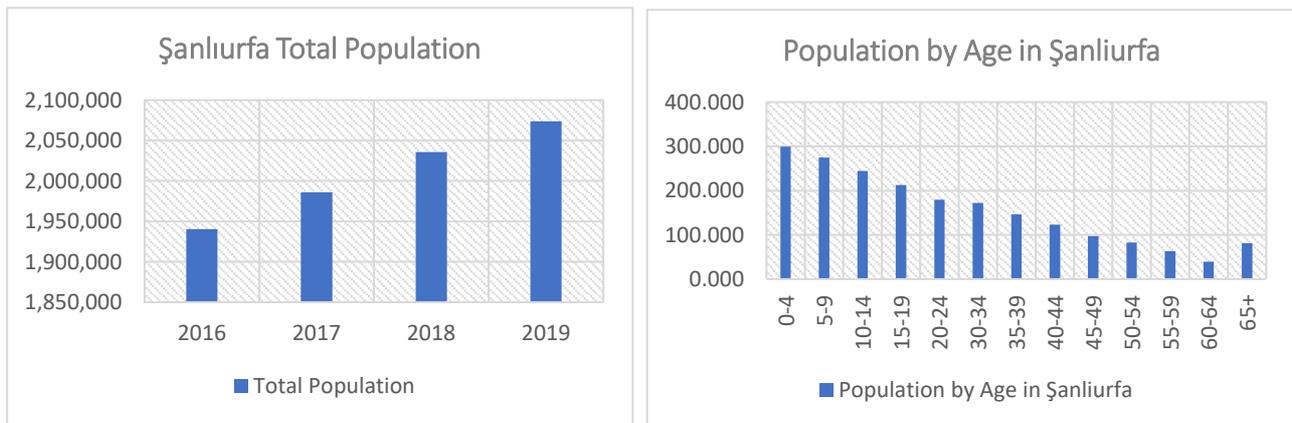
V. Key Findings of the Desk Research

In this section, the overall assessment of the business market in Şanlıurfa will be analyzed by including updates for the effect of the Covid-19. Since March 2020, when the Covid-19 labelled as a pandemic by the WHO, everything related to human life has changed, and all expectations relevant to the economy and labor market have been reversed due to pandemic. The important analyzing point in this context, although it is yet to figure out when the Covid-19 and all these processes end, if the normalization process becomes successful, which does not carry a forecast value, the expectations are expected to return to normal levels again, contrary to a current negative outlook. A detailed analysis of the Covid-19 mentioned above already, thus this section will give a perspective for a general outlook about labor market dynamics within Covid-19 updates in Şanlıurfa.

5.1 General Outlook of Şanlıurfa

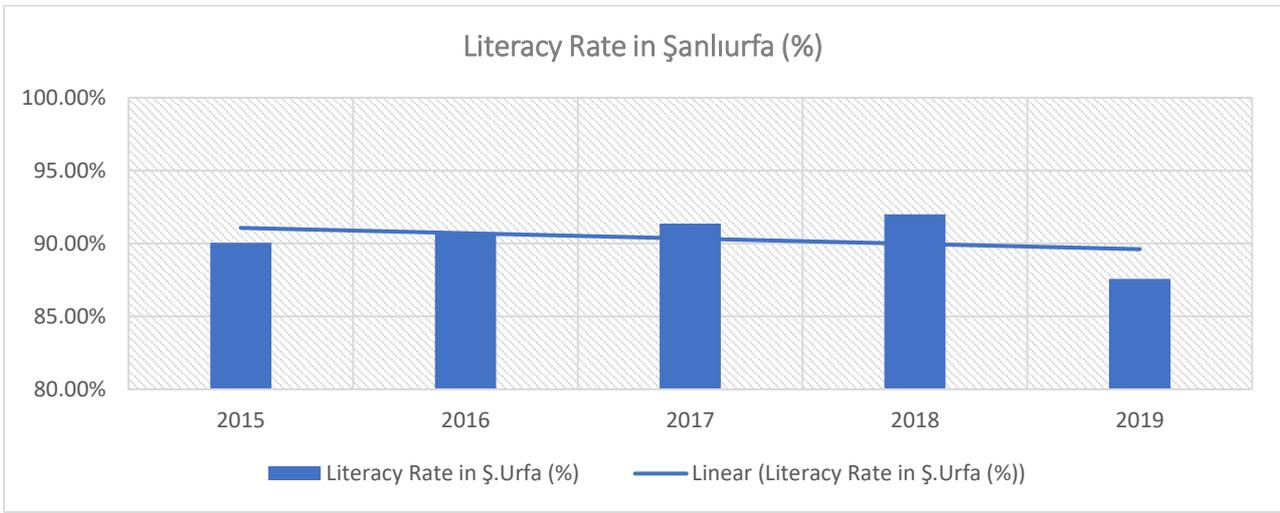
This section will examine the general characteristics and data of the city and the region in order to present a more detailed analysis and a wide perspective opportunity for the dynamics of Şanlıurfa. In this context, the demographic, social and economic characteristics of Şanlıurfa will be examined. The data to be examined in this section is not independent from the scope of this report, and it consists of information that directly and indirectly affects the labor market in Şanlıurfa. In order to keep this report up to date, the latest published data were used as much as possible. In addition, in order to analyze the effects of Covid-19, the effects and updates will be shared.

Located in Turkey's Southeast Anatolia, Şanlıurfa has a population of 2 million people, and it is home to approximately 450 thousand Syrian refugees. When we look at the demographic characteristics of Şanlıurfa in more detail, it is seen that the young population has special importance.



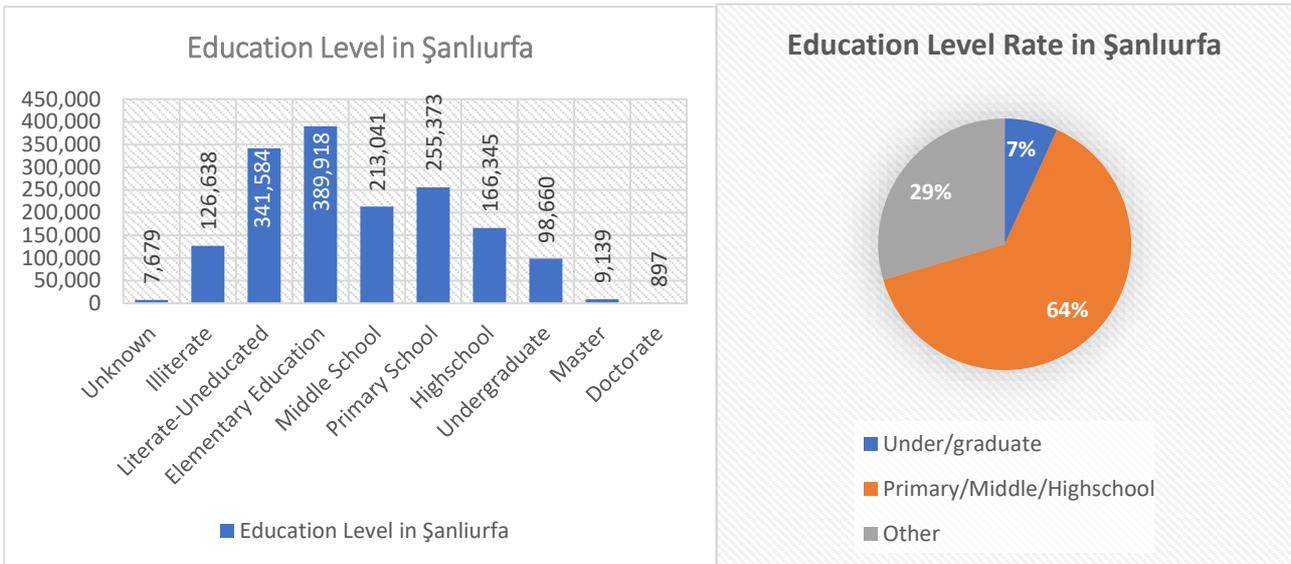
Source: TÜİK

Şanlıurfa in the population growth rate is higher than the average population growth rate in Turkey. Şanlıurfa is suitable for investment due to its high young population and high potential in many business areas. The biggest problem faced by the region in this regard is the low literacy rate and education level. As will be mentioned in the following parts of the report, the main reason for the lack of qualified workforce, which is one of the biggest problems in the labor market in Şanlıurfa, is the low literacy rate and education level. This situation has a parallel trend for Syrian immigrants joining the labor market in the region.



Source: TÜİK

Although there is no empirical data, when the literacy rate is analyzed demographically, it is known that the literacy rate of women is much lower than men. The source of this problem generally lies under cultural reasons. These are also among the difficulties experienced by Syrian migrants, children in particular. Dropout rates are high due to reasons such as early marriage and other cultural behaviors. On the other hand, economic reasons can be one of the main sources of this problem⁵. As can be seen in the table above, the literacy rate shows a downward trend. The gradual decrease in literacy rate is inversely proportional to the rate of child labor. In other words, children who do not participate in educational life participate in labor. This ratio also shows the urgent importance of the education issue in Şanlıurfa.

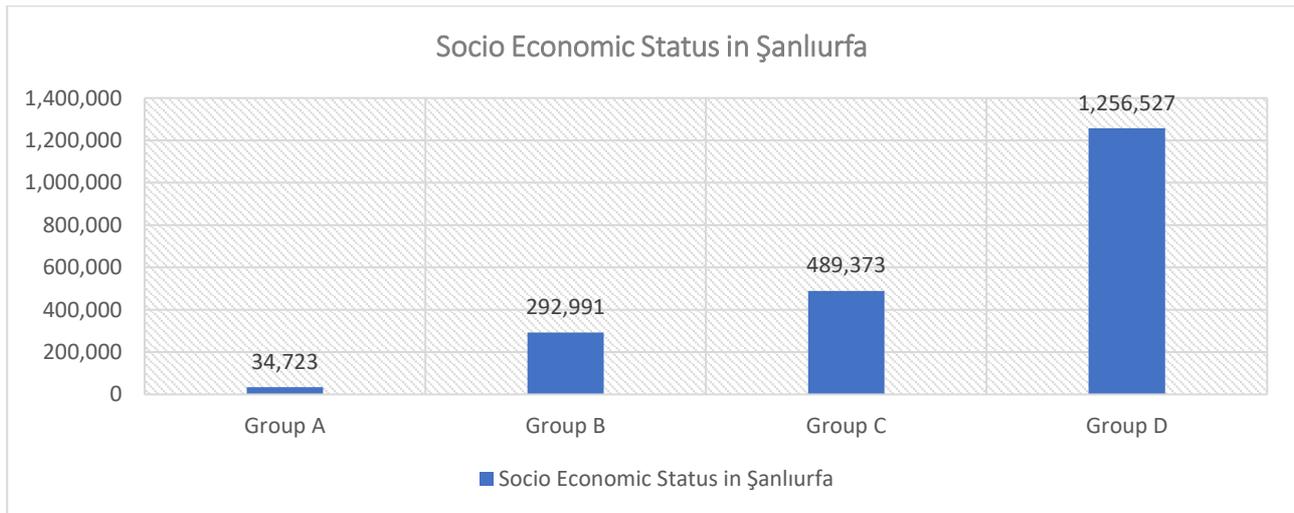


Sources: TÜİK

The fact that the rate of those with a university or higher degree is very low reflects that the labor market in Şanlıurfa mainly consists of labour-intensive production sectors. On the other hand, the high rate of uneducated individuals partially explains the high rate of unemployment in the labor market. In particular, the fact that the literacy rate is much lower for women creates major obstacles to women's participation in the labor market or causes them to turn to informal sectors. In this context, giving importance to education in the Şanlıurfa region requires high priority, especially on the basis of women and children.

⁵ Asylum Information Database, "Country Report: Turkey", 2019

Moreover, looking at the social-economic status in Şanlıurfa, which is in the form of a summary of social dynamics, will create an important level of analysis in terms of economy and provide integrity with previous data. This data can be created by combining many data provided by TÜİK (Life Index, education level, household size, spending habits distribution rates, elderly population ratio, number of workplaces, etc.). The social-economic status data is not currently dated; hence it expresses the general trend. Therefore, this data does not provide a precise and empirical analysis, but only gives an idea about the general level.



Source: TÜİK

In this data, the classification is made as Groups A, B, C, and D. Group A; It consists of large industrialists, senior executives and famous self-employed groups such as doctors and lawyers. Group B; It consists of top management of the newly labeled public and medium-large tradesmen. Group C; It consists of white-collar employees and small business owners consisting of professional professionals and managers. Group D; It consists of workers with the lowest income and education level, blue-burning workers, workers in labor-intensive sectors, unskilled workers and the unemployed. In this context, the weight in the Şanlıurfa job market is generally in group D, that is, business classes with low-income levels. However, the fact that workers and unemployed people in the informal economy are entering the class D class makes the data unhealthy. On the other hand, the ratio of C and B group classes is at an important level, underlining the sectors and initiatives that can develop in Şanlıurfa. Unfortunately, most of the Syrian immigrants in the city are also included in the D group.

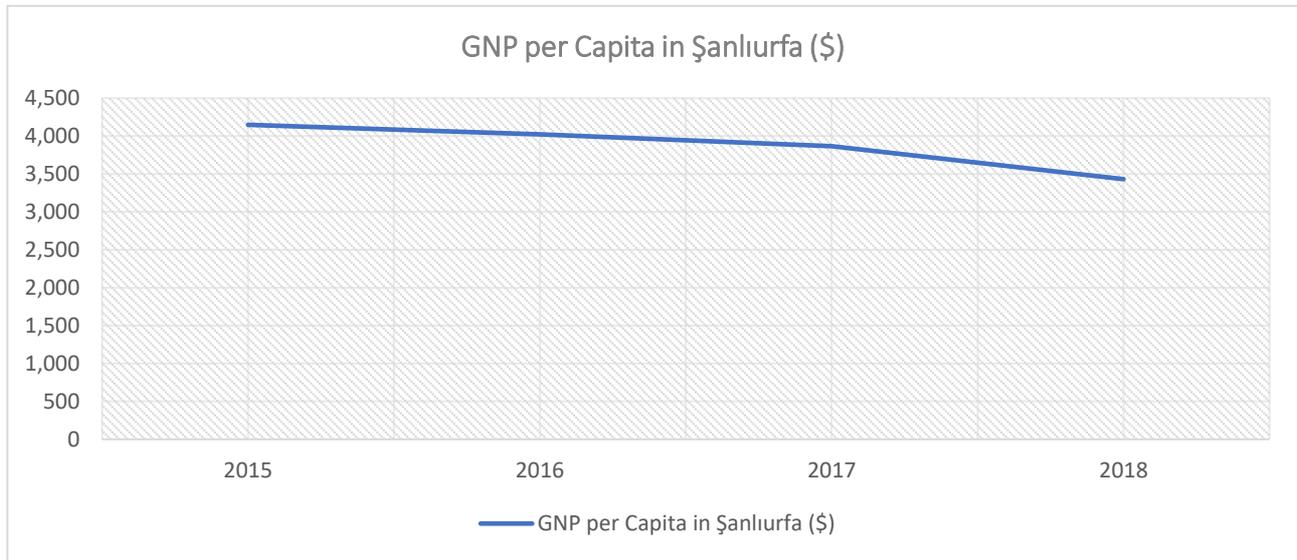
The data provided within the scope of the general evaluation make a significant contribution to this report about the city of Şanlıurfa. In particular, the analysis of these data will be used in the evaluations to be made on the Şanlıurfa Labor Market Assessment. It is important for the research that the general structure and characteristics of the region would contain more detailed data. However, this requires a more advanced and comprehensive field study.

Covid-19 Update - With the start of the Covid-19 process, it was felt intensely in Şanlıurfa as same as throughout the country. Especially as the employment structure of the city is clustered in labor-intensive sectors and home-office was not being carried out has caused to increase the number of Covid-19 cases throughout the city.

5.2 Economic Outlook of Şanlıurfa

One of the most important analysis points of the labor market assessment is under this section. In this section, the economic resources of Şanlıurfa region and how healthy the economic outlook of Şanlıurfa is will be examined. In this context, the report will be based on empirical data and analysis. It is recommended that the information and data given under this section should be taken into consideration under a holistic approach. Generally, the data consists of up-to-date data shared by official institutions. In addition, the major effects of the Covid-19 process that emerged in 2020 are observed in this context. However, since most of the data are 2019, the analysis of Covid-19 effects consists of field studies and observations.

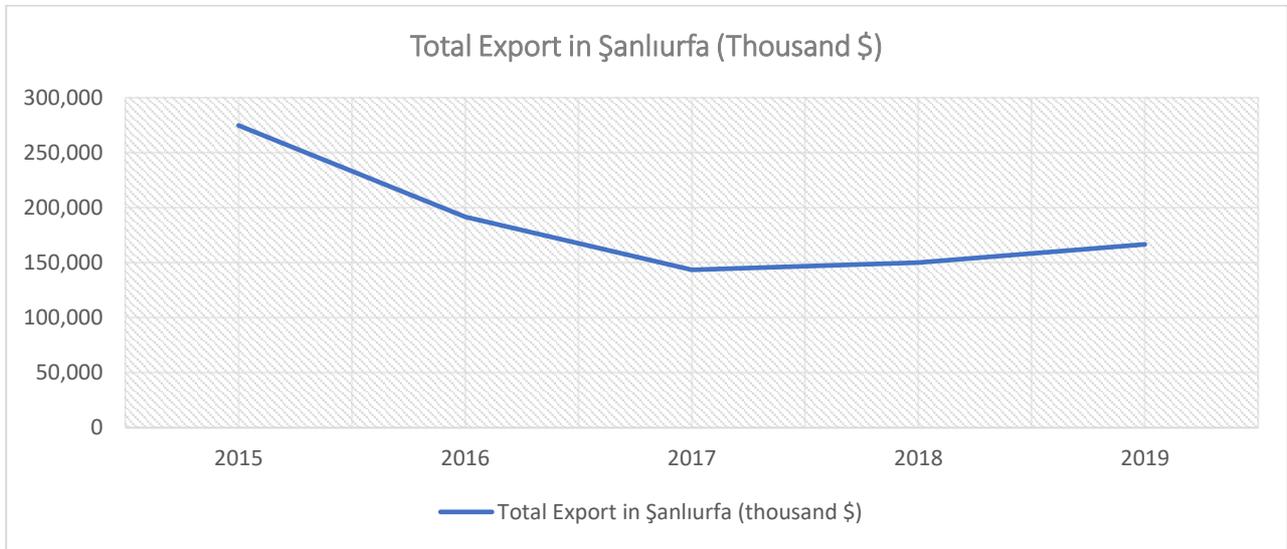
To give information about the general economic outlook, first looking at the rates of the gross domestic product will provide a level of technical analysis for the report. The share of Şanlıurfa in Turkey's GDP rate is 0.90%, while the rate of GDP per capita by the year 2018 is 3431\$ in Şanlıurfa.



Source: TÜİK

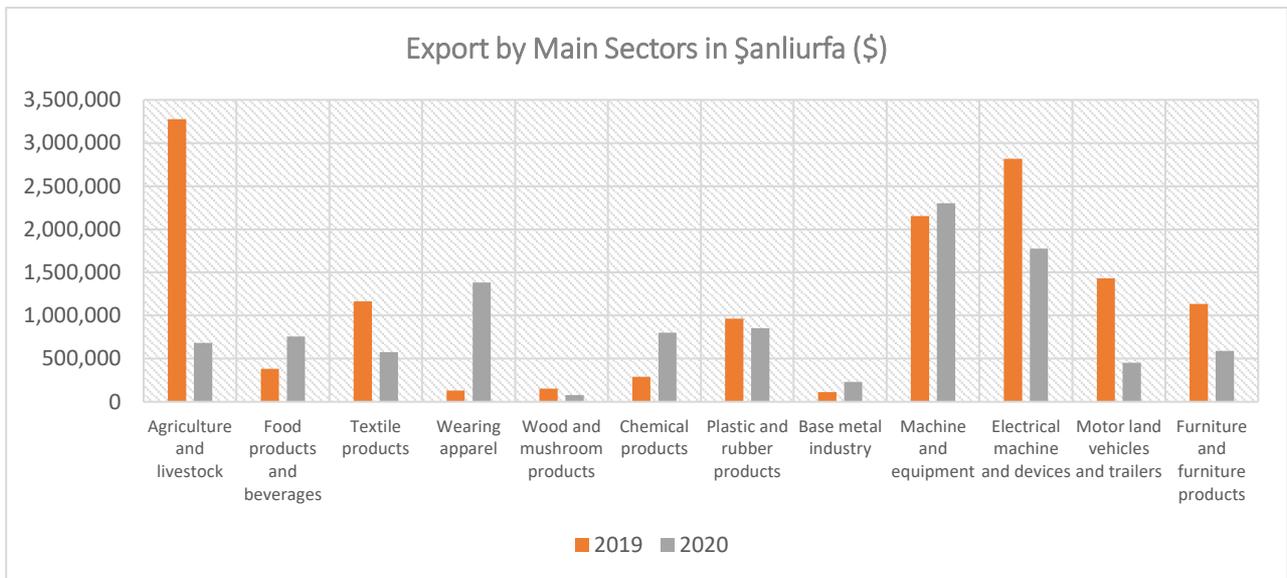
Considering the country-wide data in recent years, this amount will come out even lower currently. The main reason for this is the excessive appreciation of the dollar exchange rate against the Turkish Lira. In other words, per capita GDP increases on TL basis, but this rate decreases with the dollar rate calculation. The same problem can be seen in export data. Even if the depreciation of TL against the dollar was an advantage for export inputs, it had a negative effect on the current account balance.

Before looking at the sectoral developments in Şanlıurfa, examining the export data of the sectors will provide information from a wider perspective. Even though the export rates in Şanlıurfa are improving, its rate across the country is very low. The reason for this is that the production in Şanlıurfa is directed towards the domestic market. However, in recent years, there have been developments in the foreign market, especially with the network provided by Syrian investors.



Source: TÜİK

Just like the GDP, the rise in the dollar exchange rate has actually pulled the stable Şanlıurfa export rates to low levels. The export indicators of Şanlıurfa have parallels with the globe due to the Covid-19 with the extreme decrease in export rates worldwide and as it followed at low levels. In addition, the excessive demand in the domestic market caused by the Covid-19 process has been to the advantage of Şanlıurfa. Although many sectors have difficulties in this context, many sectors have also benefited from this situation.

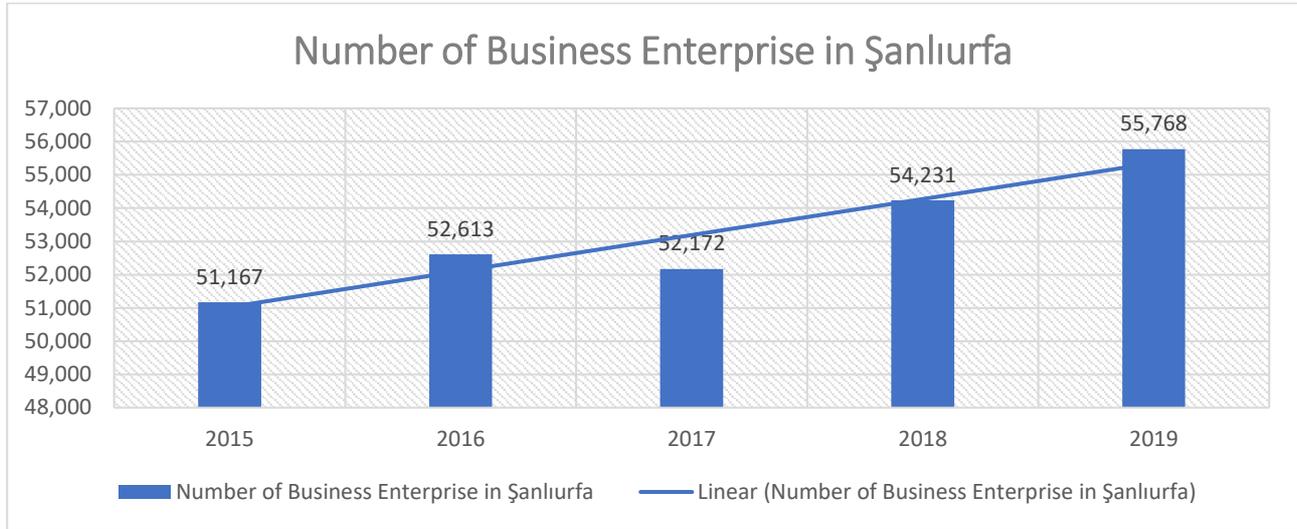


Source: TÜİK

The export data based on sectors in Şanlıurfa do not provide a healthy analysis level for just the year of 2020. There are two main reasons for this; firstly, the year 2020 is not yet complete, that is, the data includes the period until September 2020; and secondly, the markets are heavily affected by the Covid-19 process and exports have declined excessively in this context. Therefore, in terms of the overall outlook for 2020, if the expected normalization in the markets in 2021 is achieved, the overall rates can be considered as an exception

On the other hand, Şanlıurfa is a region with high investment potential and open to investment. It is included in the 6th region within the scope of incentives. Therefore, the incentive rates are quite high. This is a factor that motivates entrepreneurs and attracts investors to the region. In this sense, the only drawback of non-

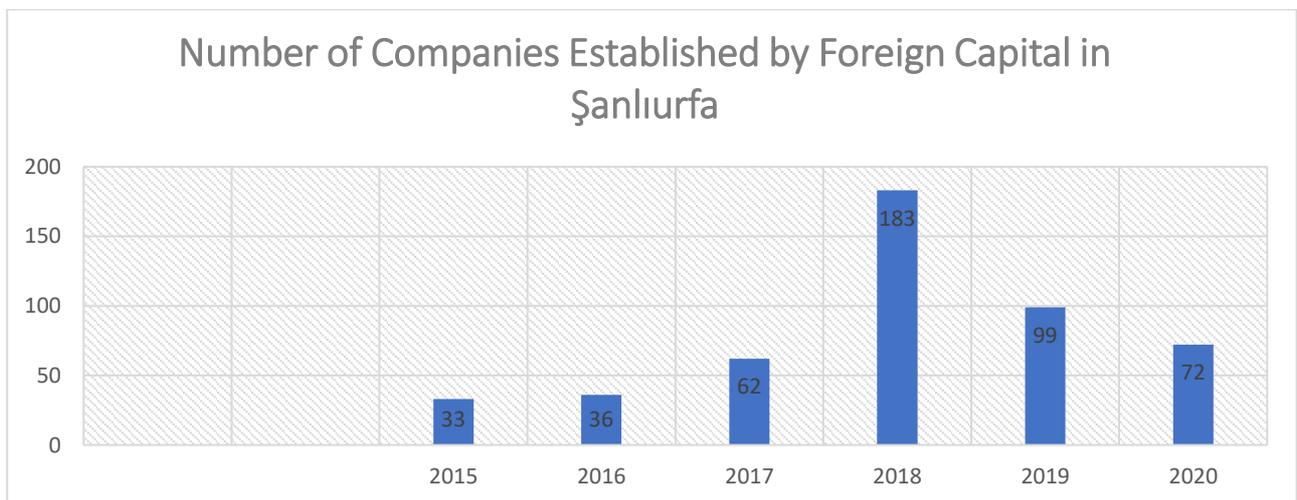
Şanlıurfa investors is the lack of sufficient technological and physical infrastructure. However, especially in recent years, infrastructure developments have gained momentum. Yet, more investments should be made, and technological opportunities should be increased in this field, especially to attract investors. In this context, agriculture-based industry, textile, food, logistics, construction materials and chemicals, renewable energy and tourism are advantageous investment areas in Şanlıurfa.



Source: TÜİK

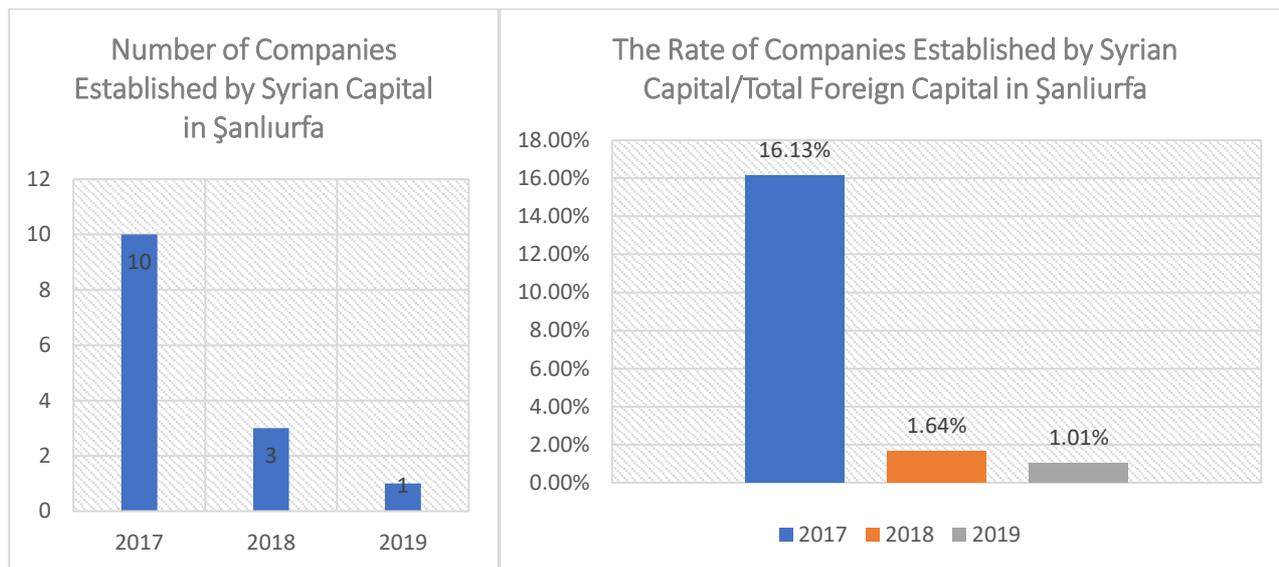
As can be seen in the graph, the number of enterprises in Şanlıurfa is increasing compared to years. The high and motivating incentive rates of the region and the high potential business sectors of Şanlıurfa are the main reasons behind this increasing trend. The upward trend in this case is a positive development in terms of the development of the region and the decrease in the high unemployment rate. In this context, initiatives should continue to be supported and efforts should be made to meet the need for qualified workforce required by the enterprises.

In this context, looking at investments from outside the Şanlıurfa region will provide an important point of analysis. There is significant foreign investment in Şanlıurfa, but this rate has been decreasing in recent years. Especially neighboring Gaziantep attracts more attention from foreign investors. Investments with Syrian capital have attracted attention among foreign capital investments in Şanlıurfa recently. In particular, the large Syrian population in the city and its geographic advantage for the Middle East market led investors with Syrian capital to turn to Şanlıurfa.



Source: TOBB (The Union of Chambers and Commodity Exchanges of Turkey), 2020

The above data for companies established with foreign capital does not only indicate foreign capital or foreign investment, but also common foreign capital with Turkish shareholders. In fact, almost all of the companies established given in this data taken from TOBB (The Union of Chambers and Commodity Exchanges of Turkey) include a joint venture of Turkish foreign capital owners. Reading this data with the data of the number of enterprises in Şanlıurfa given above will give a healthy analysis. Şanlıurfa is currently a center of attraction for foreign capital investments for many sectors. It is possible to see this in the increase from 2015 to 2018. The downward trend from 2018 to 2020 should be analyzed at the macro level, that is, within the framework of the national economy. In particular, the recent emerging risks and vulnerabilities experienced in Turkey's economy directly affects the situation. Thus, the fall in foreign capital investment, not only in terms of Sanliurfa but for all of Turkey, is seen in general.



Source: TOBB, 2019

The rates shared in the above data show the Syrian capital investments in Şanlıurfa. These data received from TOBB present the official statistics of registered companies. As in the previous data, these companies also have Turkish capital owners in their structures. In general, this projected statistic is the creation of the data collected in industry sectors. Therefore, it does not include registered shops established in Şanlıurfa, especially for the service sector. In this context, the region chosen by Syrian businessmen as the investment is generally Gaziantep. However, factory investments that will provide employment opportunities are expected by Syrian businessmen, especially in the industrial zone, in Sanliurfa in the future ⁶.

5.2.1 Sectoral Outlook

When the economy of Şanlıurfa is examined on a sectoral basis, agriculture comes first. In addition, the industrial sector, service, tourism and animal husbandry have an important place in Şanlıurfa. Especially the industrial sector in Şanlıurfa has been making a breakthrough in recent years. If the sectors are examined in detail, the area of focus in the agriculture sector is based on crop production and animal production. In the industry and manufacturing sector, there are textile and apparel, food, chemical and plastic, ceramic products, glass products and non-metal products, metal goods and machinery industries⁷.

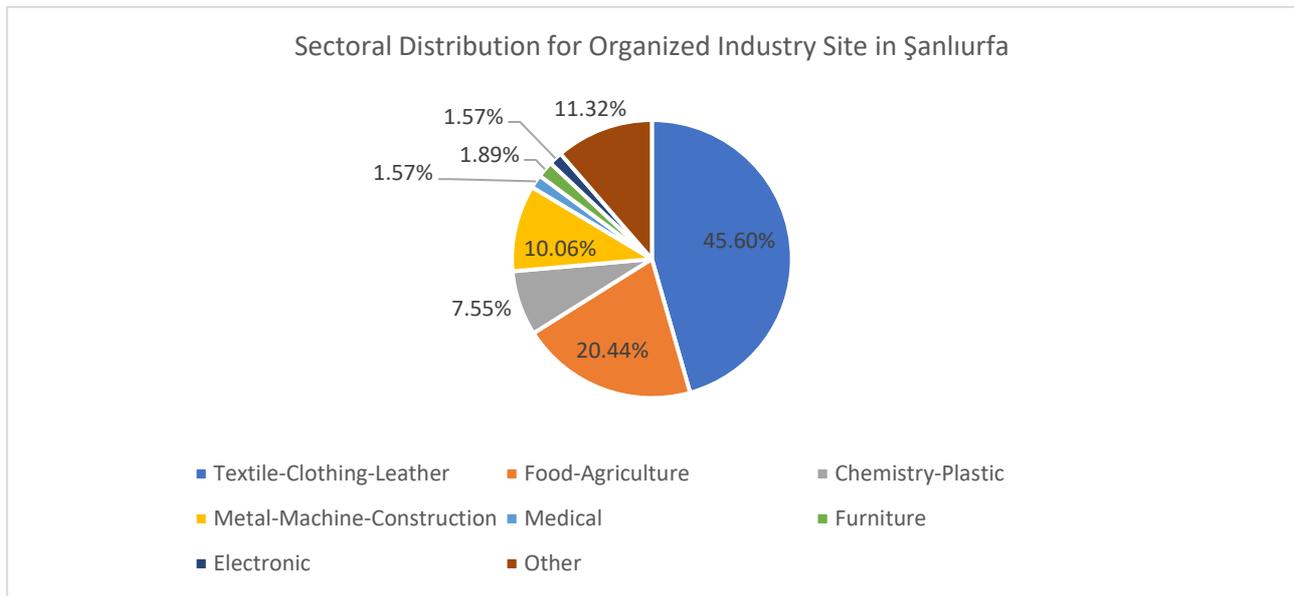
Sanliurfa, as being the 4th biggest agricultural land in Turkey, is the main supplier of many agricultural raw materials in the country. Even though the annual agricultural activity income of Şanlıurfa, which has a very high potential in the field of agricultural activity, is approximately 6 billion TL, the city is experiencing difficulties due to the insufficiency of infrastructure in the agricultural sector and the lack of sufficient

⁶ Hurriyet, 2018 "Syrian businessmen to invest in Turkey", (<https://www.hurriyet.com.tr/ekonomi/suriyeli-is-adamlarindan-turkiyeye-yatirim-40979216>)

⁷ <https://www.investsanliurfa.com/sektorler/sanliurfada-ihracatinin-sektorlere-gore-dagilimi--82>

technological development in this field⁸. Şanlıurfa a significant portion of the total effective area to be irrigated in Turkey have alone. Sanliurfa, as a leader in cotton and lentil production in Turkey and ranked as first in oilseed and grain production and second in peanut and corn production, is a center of attraction for vegetable, fruit and greenhouse investments⁹.

Industry in Şanlıurfa has developed mainly based on agriculture. The share of the Textile and Food sector in the total manufacturing industry is 64%. Especially with the textile sector, great strides have been made in the field of shoemaking recently. The leading shoe companies in the country have determined Şanlıurfa as their factory base and made their investments¹⁰. As stated in the meeting with the Governate of Şanlıurfa, approximately 5000 people are employed only in the shoemaking sector. In this context, industry supply cannot meet the demand. In addition, effective incentive systems, which have been applied in the industrial sector in recent years, have made Şanlıurfa, which already has great potential, very attractive for investments and accelerated industrial investments from outside. In addition, there is a limited diversity and potential for the mining industry in the region.



Source: Karacadag Development Agency, "TRC 2 Monthly Economic Outlook", 2020

Organized industrial zones are the areas where the industrial sector is most concentrated in Şanlıurfa. The sectoral distribution in these regions is concentrated in the fields of textile and food, as can be seen in the graphic above. Especially in the textile sector, shoemaking has made significant progress in recent years as mentioned above.

5.2.2 Sub-provinces

- *Akçakale*: The economy of the district is generally based on agriculture and animal husbandry. In the arable lands; wheat, barley, corn, cotton, etc. crops can be cultivated.
- *Birecik*: Livestock, especially sheep and goat breeding, is the main source of income for an important part of the population. The industry is composed of small enterprises in the district and consists of small workshops that utilize agricultural inputs. In the district where trade is in a more important position than industry, the service and construction sectors are also important economic fields.

⁸ Karacadag Development Agency, (www.karacadag.gov.tr/yatirim/)

⁹ The Ministry of Industry and Technology, "Turkey: City by city" (original: Şehir şehir Türkiye), 2019

¹⁰ Hurriyet, 2018 "Urfa becomes a shoe-making base", (<https://www.hurriyet.com.tr/ekonomi/urfa-ayakkabi-ussu-oluyor-40994065>)

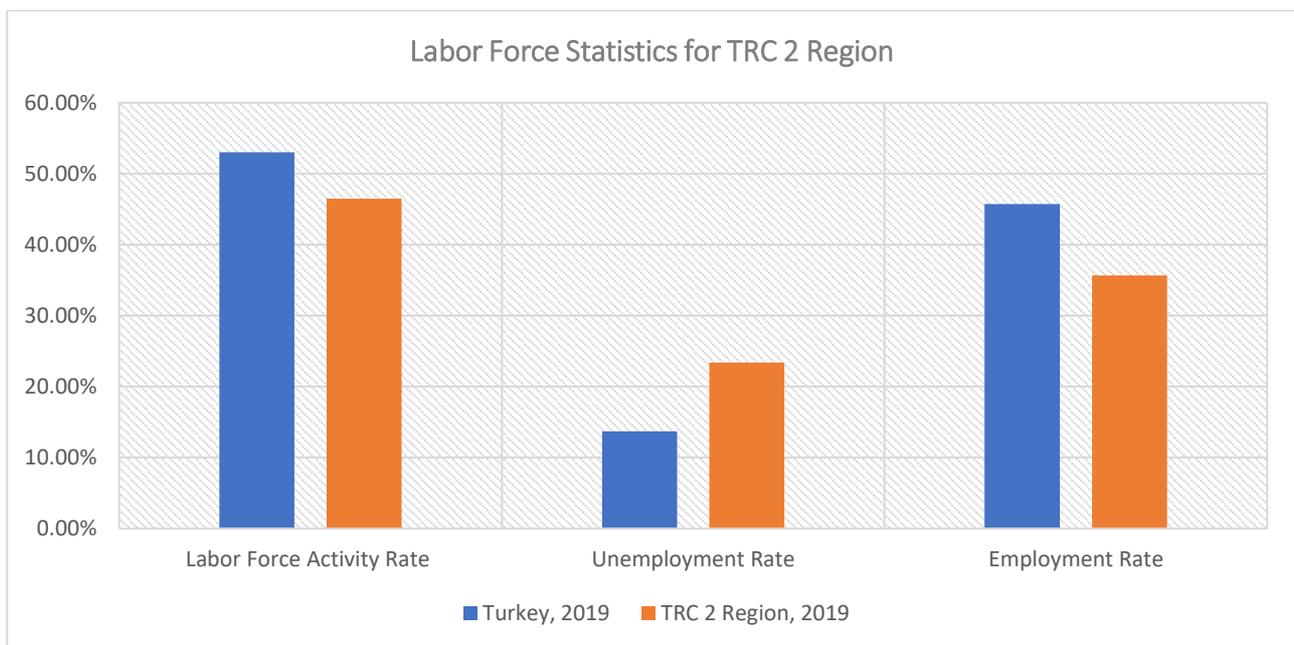
- *Bozova*: Livestock is the primary source of income for the people of the district, and with the introduction of irrigation projects, great developments have occurred in the field of agriculture.
- *Ceylanpınar*: Since most of the lands belong to the General Directorate of Agricultural Enterprises, job areas were created, but the migration to the district stopped due to the lack of new business areas. Most of the people work as workers in the Agricultural Enterprise.
- *Harran*: Since the people of the district have difficulties in finding jobs, the majority of the population go to metropolitan cities and work. The rest of the population works in the arable fields and various places. Greenhouse cultivation has also started to spread and develop.
- *Halfeti*: District economy is generally based on agriculture and animal husbandry. Its main products are wheat, barley, lentil, pistachio, vineyard and olive.
- *Hilvan*: The main source of income in the district is agriculture and animal husbandry. Projects such as the development and encouragement of fruit growing, vegetable growing, greenhouse cultivation, viticulture, ornamental plants, alternative cultivation; increasing the cultivation of pistachios, olives, almonds and the use of certified seeds in the second and third class stony agricultural lands; encouraging the cultivation of crops such as corn and soybeans as the second crop after wheat and barley; incentives for forage crops in order to improve livestock farming, are being implemented in Hilvan.
- *Siverek*: 80% of the population of the district earns a living by working in agriculture, animal husbandry and seasonal jobs. 10% are tradesmen, 5% are self-employed and 5% are unemployed.
- *Suruç*: A large part of the population of the district is unemployed and goes to seasonal jobs. The most important economic occupation of the region for many years has been smuggling at the border. The economy of the district is mostly agriculture.
- *Viranşehir*: The foundation of the economy has been agriculture and animal husbandry. Thanks to intensive cotton cultivation, the agricultural industry has been formed. Due to the high demand for pesticides and chemical fertilizers, it has been possible to increase dealerships and increase business opportunities.

Covid-19 Update - As a result of the measures taken within the scope of Covid-19, the service sector was most affected. Problems were experienced due to the hours regulation and temporary closure of businesses such as cafes, restaurants and barbers. In addition, the decrease in global exports has also negatively affected the export rates in Şanlıurfa. In this context, the textile, food and hygiene sector has experienced job and capacity development as a result of excessive demand. In order to meet the needs of the domestic market in Turkey, and as a result of this; Şanlıurfa, especially the textile and food sector has started to develop. At this stage, techniques such as e-commerce and e-marketing were developed in many business areas, and a positive development was experienced in terms of modernization of the business process. According to the information obtained from the meeting with the governate, 500 million TL support has been given to Şanlıurfa by the state under the Social Protection Shield since the beginning of Covid-19. However, it was stated that Şanlıurfa economy, which is already fragile, needs more support in order to overcome this process.

5.3 Şanlıurfa Labor Market

The main target this report tries to reach is the analysis of the labor market assessment in Şanlıurfa. The demographic, socio-cultural and economic structures of Şanlıurfa, which the report has examined in the previous sections, have vital importance for the level of analysis. The purpose of the report is not just to focus on one subject, but to obtain a holistic analysis. In this context, both the data of official institutions and Orange's own studies were used as sources.

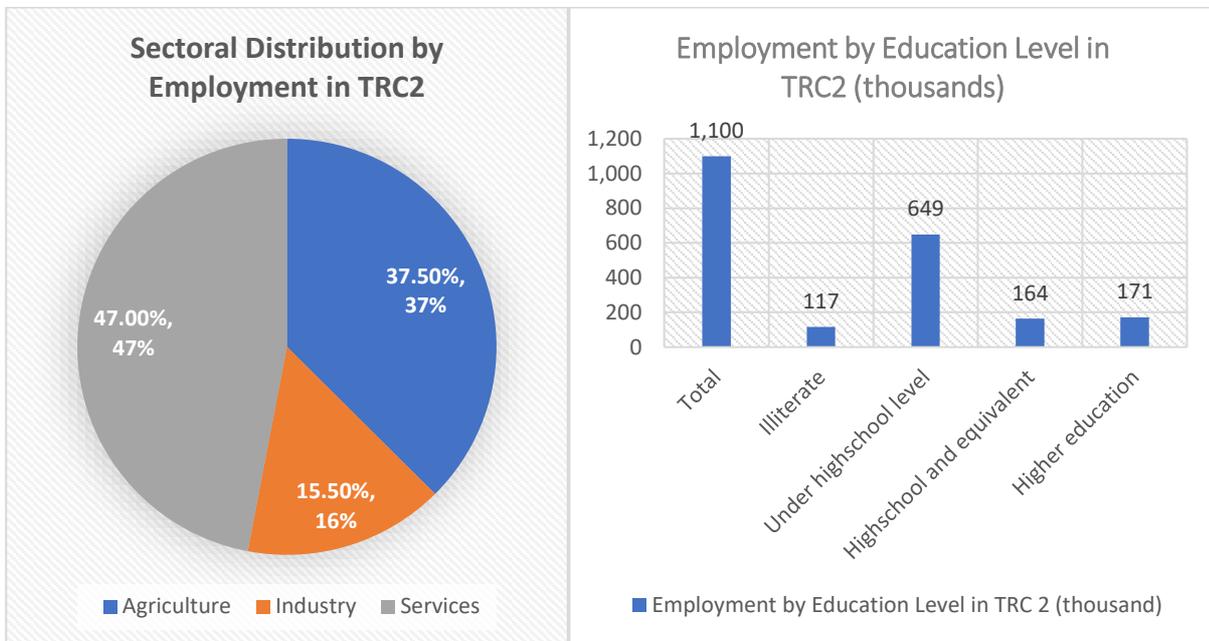
The labor market in Şanlıurfa is generally concentrated in agriculture, service, industry and other sectors. Employment in the industrial sector is increasing, especially as a result of the investments that have been increased with the incentives made recently. However, the unemployment rate in the city is also high. Even though the city has potential in terms of employment opportunities, the biggest problem related to this is the very low levels of education and the shortage of qualified and skilled labor, which is also mentioned above in the report. Especially in the industrial sector, there is a huge problem in terms of a qualified workforce. Same as Turkish labor workforce, one of the biggest problems in the employment of Syrian migrants in the city is the low rate of education and qualified workforce. In addition, the expected rate of increase in employment in Turkey is 19.3% while it is followed by 15.9% in Şanlıurfa¹¹.



Source: TÜİK

In the Labor Force Statistics published by TÜİK (Turkish Statistical Institute), data are published on a regional basis, not on a province basis. Therefore, it is believed that the healthiest data are regional statistics. In this context, the labor force statistics of Şanlıurfa and Diyarbakır, which are shown as TRC2 region, are available above. These rates are almost the same for each province. One of the remarkable details in the chart above is that the unemployment rate in the region is higher than Turkey's average unemployment. Likewise, the employment rate is below the average in Turkey. In this context, one of the biggest problems experienced in the region is high unemployment. Particularly, female labor force participation rates are very low in the region for cultural reasons. This statistic is expected to change positively for the region with the increase in the level of education and the increase in the rate of a qualified workforce.

¹¹ İŞKUR, "Şanlıurfa: The Labor Market Assessment Report", (Original: Şanlıurfa İşgücü Piyasası Araştırma Raporu), 2019



Source: TUIK

One of the first striking elements in the Şanlıurfa job market is the concentration of employment in labor-intensive sectors. Even though the education level is gradually increasing in the new generations, the education level of the majority of employment is below high school. This result creates difficulties due to the need for qualified workforce in sectors other than labor-intensive sectors. Even if the most important sectors of the region are concentrated in the labor-intensive area, investments and developments in more qualified areas are also required for the development of the region.

When we look at the data on Şanlıurfa basis, the most important data source is obtained from İŞKUR statistics, reports published by other state institutions and field studies. However, these data are likely to be detailed rather than showing general rates. As mentioned above, regional statistics and provincial statistics show a balanced similarity. Many sectors in Şanlıurfa create long-term development plans thanks to the advantage of investment incentives. However, since these plans will be effective in the long term, their reflection on employment will spread over the long term. More, the labor market in the city needs structural reforms. Therefore, in parallel with the long-term planning in the sectors, the labor market should also be modernized in the long term. The sectors where the most employment is provided in Şanlıurfa consist of manufacturing, construction, agriculture and textile. On the other hand, when we look at the details of the Şanlıurfa job market, the first striking statistic is the increasing unemployment in the city.

The main reason for this is the lack of a qualified workforce, as it is repeated many times in the report. Although the unemployment rate has increased on a provincial basis compared to the previous years, according to a report published by the UNDP, Şanlıurfa's capacity rate to fill the projected labor gap is higher than nearby provinces¹². The crucial factor here is remarking the importance on the high rate of attendance to the trainings, especially in vocational and on-the-job trainings. Nevertheless, the traditional businesses for Syrian citizens such as shoemaking, furniture, jewelry should be promoted. Besides, these sectors established by Syrian citizens should be channeled modern business models such as e-commerce and online shopping in order to build sustainability by increasing export opportunities.

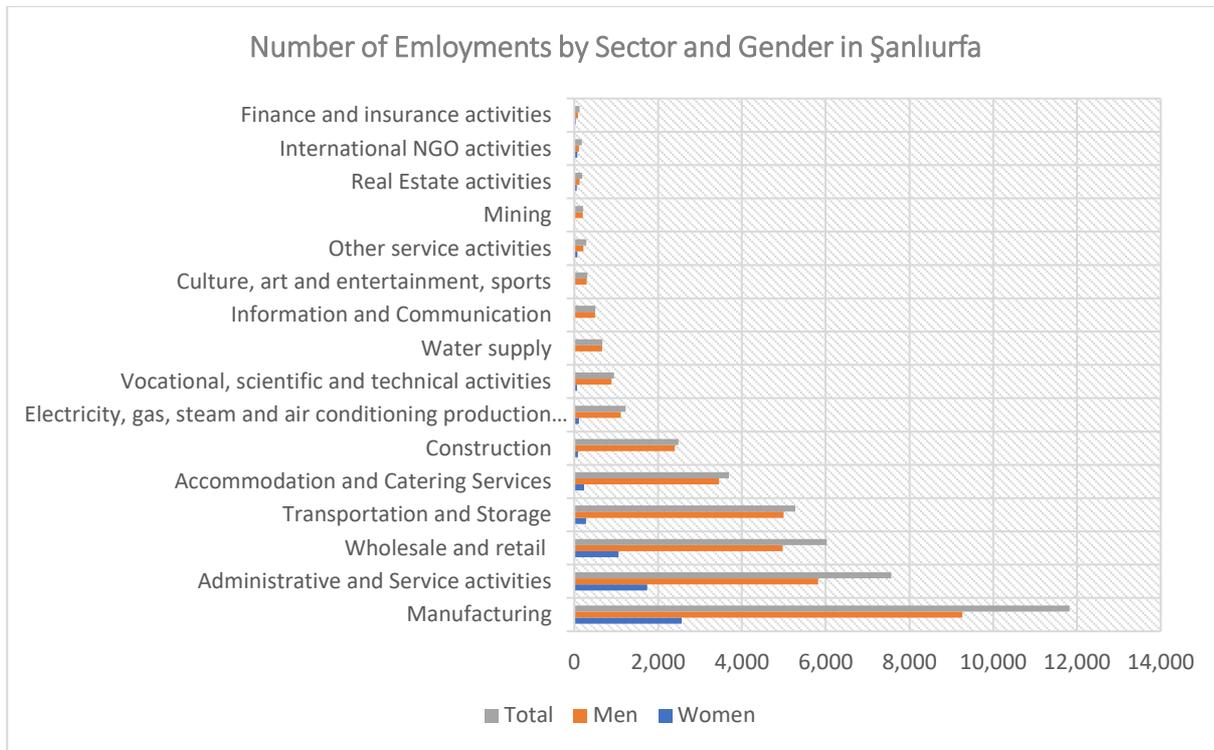
¹² UNDP, "Absorptive Capacity and Potential of Local Labor Markets: The Case of Gaziantep, Hatay, Kahramanmaraş, Kilis, Şanlıurfa", 2016

2019 Labor Force in Şanlıurfa	Women	Men	Total
Registered Labor Force	61.267	105.547	166.814
Registered Unemployment	46.232	53.494	99.726

Source: İŞKUR, *Şanlıurfa: The Labor Market Assesment Report*, (Original: Şanlıurfa İşgücü Piyasası Araştırma Raporu), 2019

In the above data, the numbers of working and unemployed people who are registered with İŞKUR residing in Şanlıurfa are given. Data does not cover all workforce in Şanlıurfa. Even though the enrollment to İŞKUR has increased as a positive development recently, the number of workforces not registered in İŞKUR is high. However, the data is an important source of analysis in terms of giving a general impression.

In another study carried out by İŞKUR, the number of employees in enterprises employing more than twenty was shown by sectors and gender. In this data, the total number of employees for enterprises with more than twenty employment has been determined as 45.446¹³.

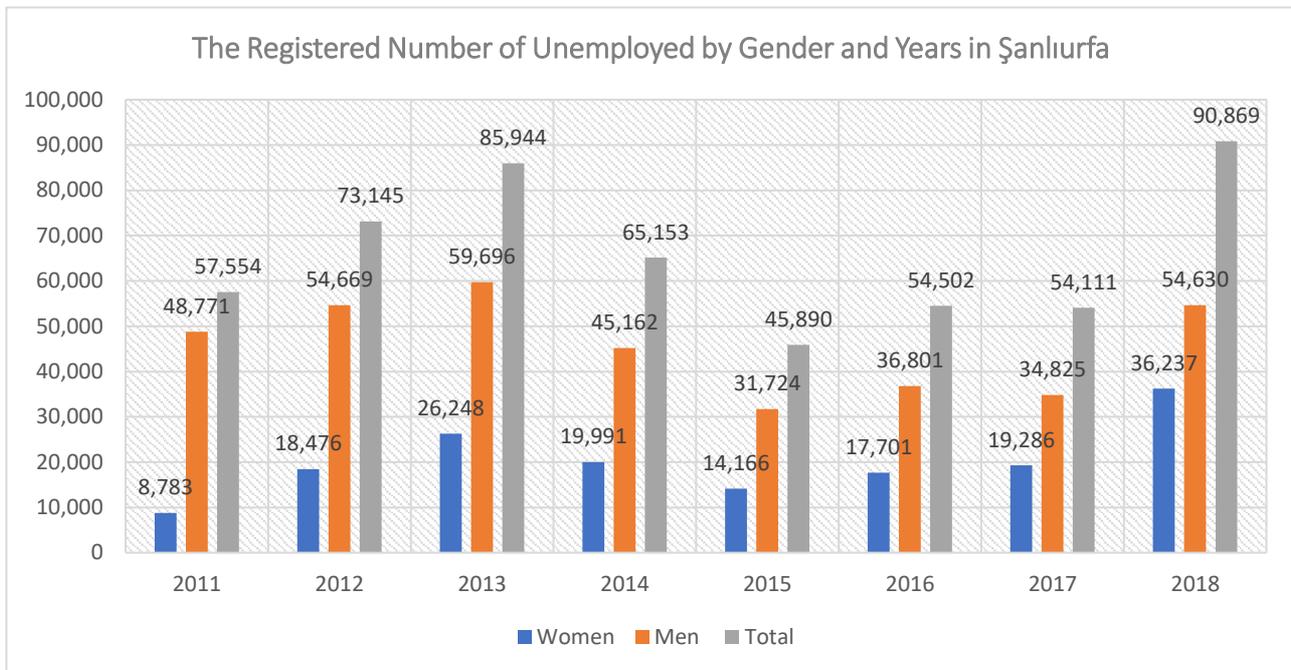


Source: İŞKUR, 2019

In this context, it is possible to see that a significant part of the employees among the enterprises providing employment for more than twenty are manufacturing and administrative and support service activities. As is evident here, the area where employment is concentrated in Şanlıurfa is labor-intensive sectors for both men and women.

When looking at the unemployment data in the labor market in Şanlıurfa, high figures are encountered. In this context, when the number of registered unemployed people in Şanlıurfa province is examined, the field with the highest number of registered unemployed in both men and women is the manual labor occupation group.

¹³ İŞKUR, *Şanlıurfa: The Labor Market Assesment Report*, (Original: Şanlıurfa İşgücü Piyasası Araştırma Raporu), 2019

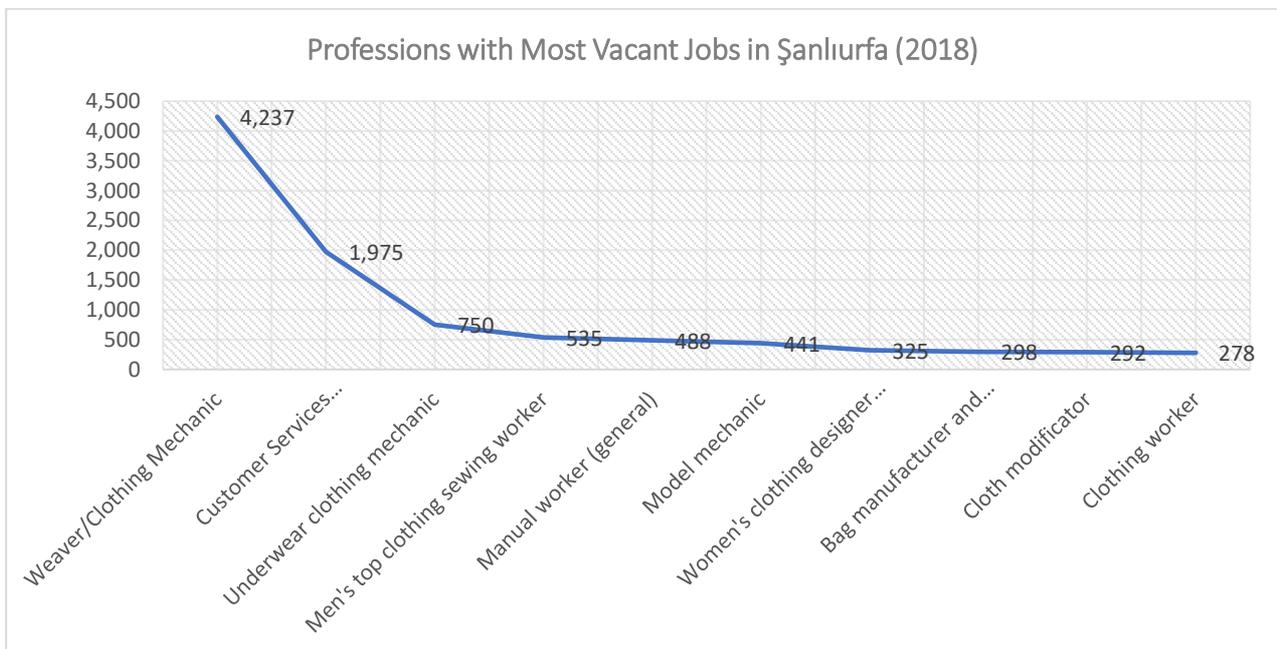
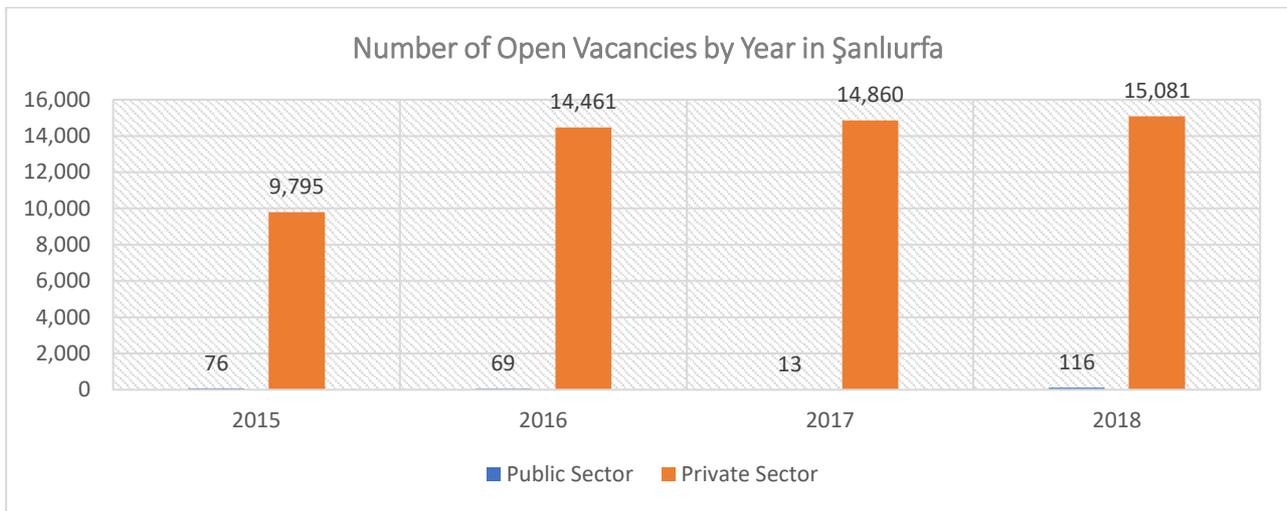


Source: İŞKUR, 2019

The registered unemployment rate in Şanlıurfa is shared by gender in the graphic above. It is seen that the registered unemployment rate has increased in recent years. The main reason for this is the increasing number of registrations in İŞKUR over the years, even though this is a very important development for the job market. The other point to be noted here is that this data is not unique to Şanlıurfa. In particular, the overall unemployment rate in the context of the problems experienced by Turkey's economy has increased in recent years. Therefore, the same reflection of this can be seen also in Şanlıurfa. Another striking factor here is that there are more male registered unemployed than female registered unemployed. Since the participation rate of women in the labor force is very low, it is normal for the rate of registered unemployed men to be higher than women.

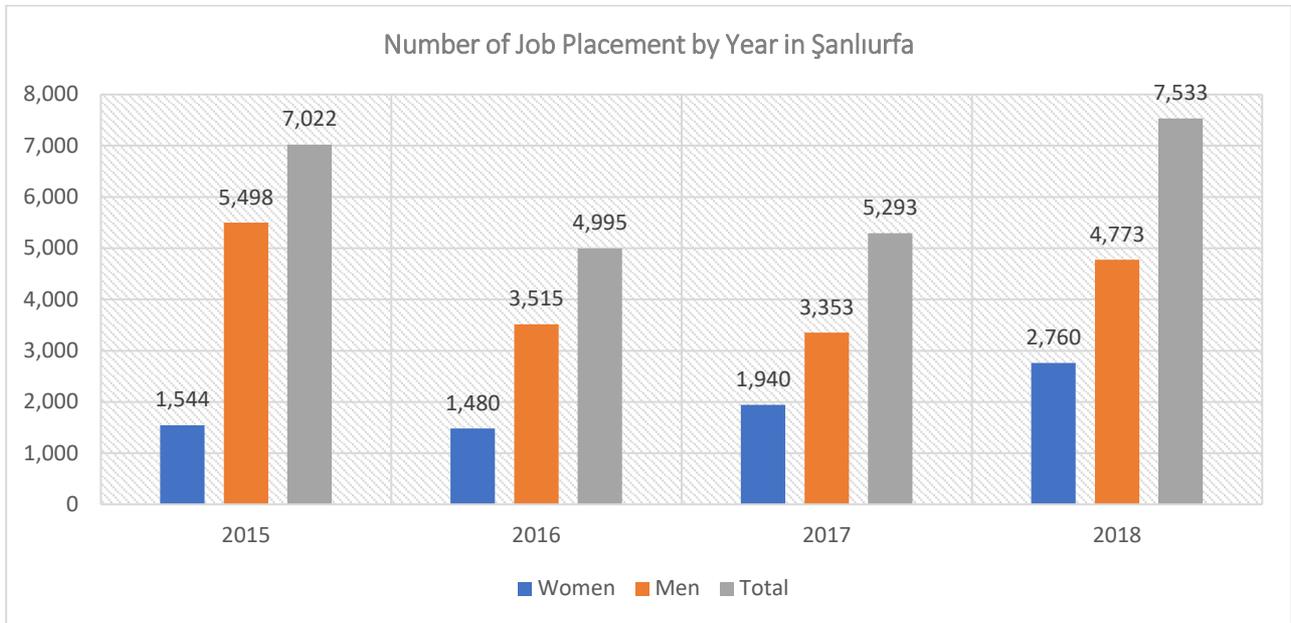
Again, according to the UNDP's report, decreasing the labor gap for Syrian and Turkish citizens is based on the capacity development in the sectors of agriculture, livestock, food, textile and machinery, which in total could create about thirty thousand employment opportunity. Particularly, in order to provide livelihood opportunities to the vulnerable communities, it is consulted by the UNDP that the capacity development of businesses established by Syrian entrepreneurs in the region should be supported¹⁴. For instance, shoemaking, one of the traditional lines of business especially owned by Syrian citizens, is one of the leading sectors that are currently developing in Şanlıurfa. In this framework, the necessary vocational training should be provided, the capacity increase should be supported, and the integration of Syrian citizens into the labor market in the shoemaking sector in Şanlıurfa should be ensured.

¹⁴ UNDP, "Absorptive Capacity and Potential of Local Labor Markets: The Case of Gaziantep, Hatay, Kahramanmaraş, Kilis, Şanlıurfa", 2016



Sources: İŞKUR, 2019

The data about job vacancies available under İŞKUR in the Şanlıurfa job market are shared above. As a positive development, business placements are more successful within the scope of open jobs, especially as businesses are registered with İŞKUR after 2015. When it is looked at the graph in which vacant jobs are shared according to occupational groups, it is seen that there are mostly vacant jobs in the textile sector and sectors dependent on textile. However, when we compare it with the previous data, there is a big difference between the number of employment that enterprises demand from İŞKUR and the number of registered unemployment under İŞKUR. From this analysis, it can be seen that the employment supply in Şanlıurfa cannot meet the demand for employment. In order to overcome this, business capacities should be increased as mentioned above. In this context, another important data is the difference between the number of open jobs and the number of job placements.



Source: İŞKUR, 2019

The difference between the number of vacancies and job placements is almost half. The main reason why open job demands cannot be fully met is that employers demand qualified labor. The most striking factor in this graph is the increase in the number of women over the years. This can be described as a very important development on the basis of Şanlıurfa province. As stated in the data of İŞKUR, this development has been achieved by the intensive regulation of World Bank projects.

Looking at the general assessment of the Şanlıurfa labor market, it can be seen that the unemployment rate is high and the labor market is generally concentrated in labor-intensive sectors. However, even if the female labor force participation rate is increasing, it is yet low. Looking at the labor market, employment supply cannot meet the demand for employment. Therefore, capacity should be increased in Şanlıurfa, especially in areas where employment is concentrated. On the other hand, one of the biggest problems experienced by the employment supply is the shortage of qualified workforce in the labor market. The low level of education and the shortage of qualified workers have led to the concentration of employment in the labor-intensive sectors. In this context, vocational trainings and developments should be supported and increased in number. Especially these trainings should be created by determining the qualification demands of the employment supply. Each qualified employee recruited supports the development of other sectors in Şanlıurfa and therefore regional development.

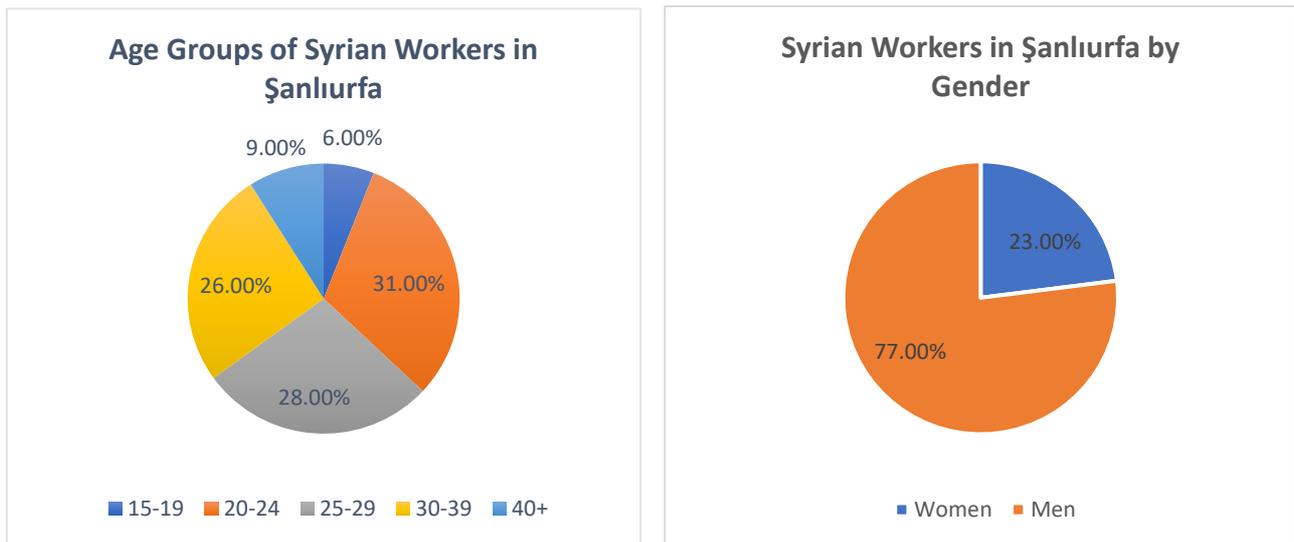
On the other hand, looking at the informal economy, it is not possible to reach any data. However, within the framework of the meetings with the Governate, it is stated that the informal economy is concentrated in the agriculture, construction, daily affairs and service (hookah cafe, etc.) sector. In this context, employers and employees have been informed about the informal economy for the law and regulations. Nevertheless, it has become a reason to be preferred by employers due to the low costs. And in the long run, the informal economy causes great damage to the development of the region.

5.3.1 Syrians in Şanlıurfa Labor Market

Şanlıurfa has been one of the cities most affected by the Syrian Migration due to its geographical location. There are approximately 450 thousand Syrians living in Şanlıurfa. Syrians who live in urban areas across the country have no choice but to work to survive. However, their livelihood options that can make a room for them in a new country and labor market are limited. The labor market in Şanlıurfa becomes very difficult, especially when the financial difficulties of Syrian citizens are added to a city like Şanlıurfa, where the unemployment rate is high. Difficulties in the labor market direct Syrian citizens to livelihoods with low

wages. Among them, the density mostly occurs in the informal economy. In this context, increasing livelihood support for Syrian citizens and offering labor market trainings is an essential requirement.

Before going down to a detailed Syrian workforce analysis, analyzing the demographic characteristics of Syrian working citizens based on the province of Şanlıurfa will make an important contribution to the achievement of this report. In this context, the research conducted by the International Labor Organization within the scope of Şanlıurfa, "The Perspective of Employers and Workers on Syrian Employment in Şanlıurfa" will be used. The report does not contain up-to-date data, nevertheless, there is no other data source prepared in detail within this scope. Even though it presents the general idea of four years ago, it is crystal clear that there was not a major change in this perspective up to current, which is why it did not make an issue of using this data on the report.

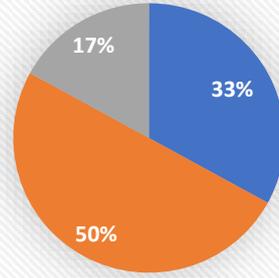


Source: ILO¹⁵, "The Perspective of Employers and Workers on Syrian Employment in Şanlıurfa", (Original: Şanlıurfa'da İşveren ve İşçilerin Suriyeli İstihdamına Bakışı), 2016

When the demographic characteristics are examined, it is seen that among Syrian employees, males by gender and between the ages of 20-24 by age group are frequently employed. The positive feature that draws attention in age group data is that the population participating in employment is densely young. But this also shows that the elderly and children suffer from a lack of regular livelihoods. Apart from being in an already fragile community, they are becoming more vulnerable because of their lack of access to the labor market. The other graphic shows the gender distribution. It can be seen that men take place in the labor market much more than women. Even though the participation of Syrian women in the labor market increases every year according to the data published by İŞKUR, its low levels still show that women have difficulties in reaching their livelihoods. Therefore, in livelihood projects, women should be supported in order to ensure their participation in the labor market.

¹⁵ ILO – International Labor Organization

Income levels of Syrian Workers in Şanlıurfa



■ Under 1000 TL ■ 1000-1500 TL ■ Above 1500 TL

Source: ILO, “*The Perspective of Employers and Workers on Syrian Employment in Şanlıurfa*”, (Original: Şanlıurfa’da İşveren ve İşçilerin Suriyeli İstihdamına Bakışı), 2016

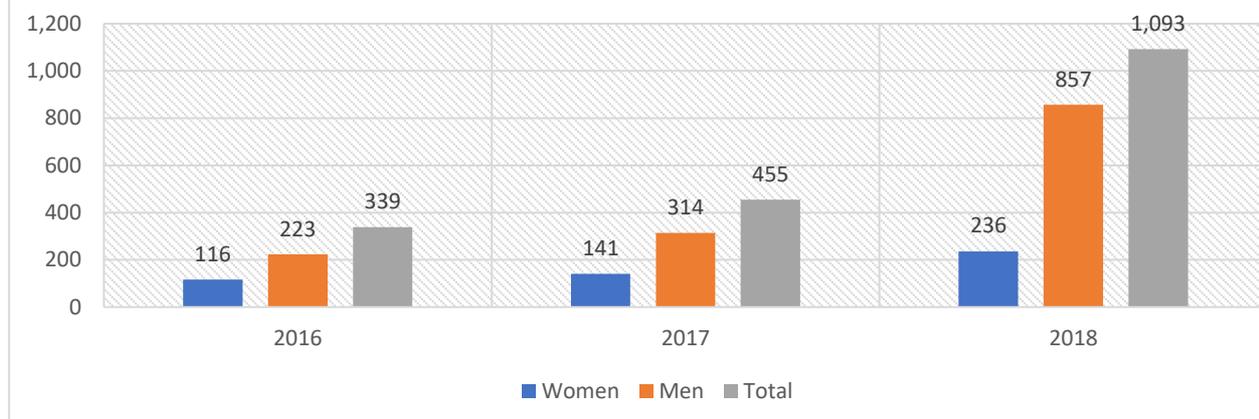
The chart above shows the income levels of Syrian workers in Şanlıurfa. The following should not be forgotten about the data provided by the ILO; these data do not constitute a general level of analysis as they were created within the scope of focus group studies, however it reflects the general level. In this context, many Syrian workers earn income levels far below the poverty line, although they have a means of livelihood. These income levels are far below the amount that many Syrians need in order to survive. The main reason for these low-income levels is that they involve in informal sectors.

The lack of sustainable livelihoods and therewith high costs of living bring a poverty problem for Syrians who live in Şanlıurfa, despite many supports offered by the government of Turkey. In this context, it is very important to create sustainability in the livelihood projects. In addition, the participation of women into labor market should be encouraged in order to overcome the problems mentioned above. The economic empowerment projects thus should target much more women and further studies should be conducted in this framework. According to a relevant report published by TEPAV, Syrians compared to Turkish and women compared to men have become more fragile within the period of Covid-19¹⁶. It can be easily observed that the disadvantaged position of Syrians in the labor market has become more evident. Therefore, separate support should be provided due to the negative effects of Covid-19, in addition to the current livelihood supports.

The healthy integration of Syrian citizens into the labor market in Şanlıurfa passes through obtaining a work permit. Temporary or indefinite work permits constitute a guarantee for both the labor market and Syrian citizens. Syrian workers in the informal economy are both wages below the minimum wage and lack of security. In addition, the difficulties experienced by these people are unknown unless they express themselves or be reached.

¹⁶ : TEPAV, “How did Covid-19 affect labor market?”, (Original; Covid-19 işgücü piyasasını nasıl etkiledi?), June 2020

Number of Syrian Work Permits by Gender and Year in Şanlıurfa

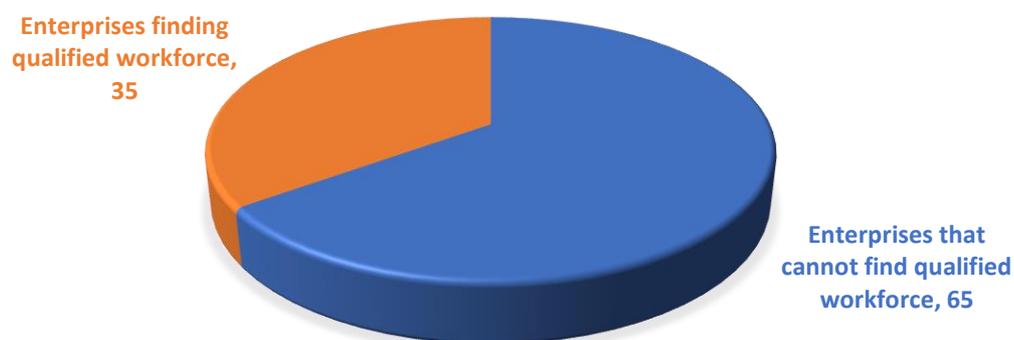


Source: The Ministry of Labour, Social Services and Family, “*Work permits of foreigners*”, 2018

Considering the data of the annual work permits report provided by the Ministry of Labor, Social Services and Family, a high increase in the number of work permits has been observed recently in Şanlıurfa. The increase in applications for the work permit and the corresponding increase in the number of work permits is indeed an important positive development. However, when compared to the number of Syrian citizens in the city, it can be analyzed that the numbers are yet low and thus, Syrian citizens still need support for their livelihoods.

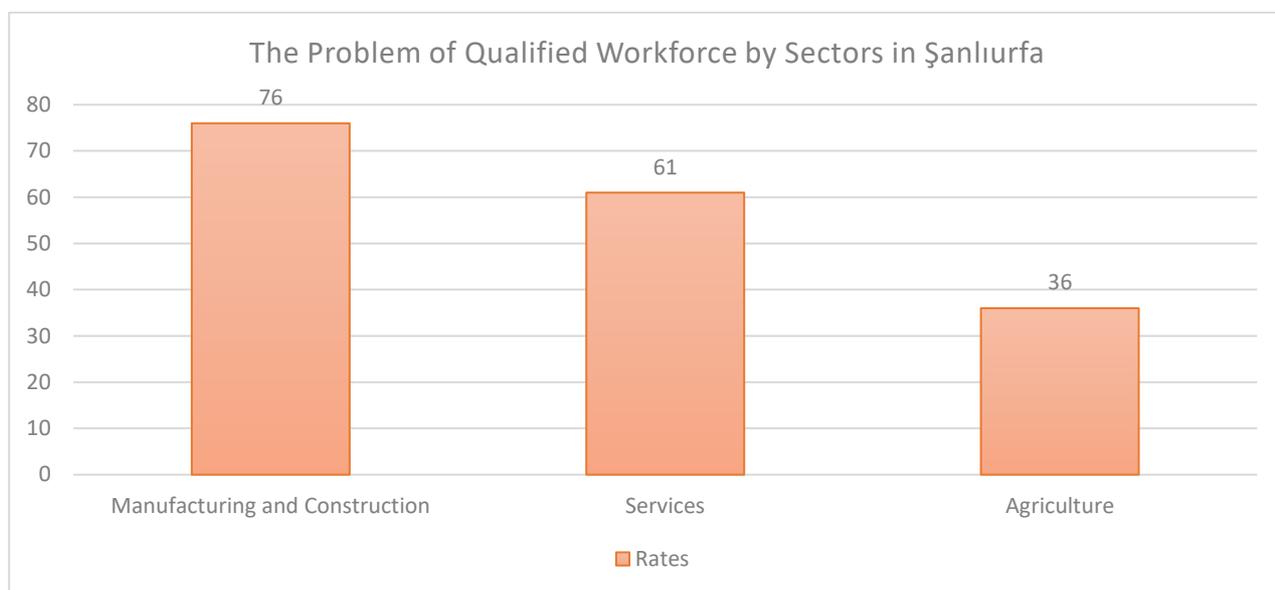
The biggest problem that Syrian citizens face in joining the labor market is their low education level and their lack of job-based qualifications. In the job processes, Turkish citizens are preferred firstly compared to Syrian people that have the same level of qualifications. In this context, especially Syrian citizens with qualified workforce should be supported. In this context, offering entrepreneurship supports seem a coherent option. Nonetheless, in the research conducted by the ILO throughout Şanlıurfa, Syrian employment was evaluated from the perspective of employees and employers. In this context, from the perspective of employers, it has been evaluated that the biggest problem in Syrian employment is the non-qualified workforce.

THE PROBLEM OF QUALIFIED WORKFORCE BY EMPLOYERS IN ŞANLIURFA



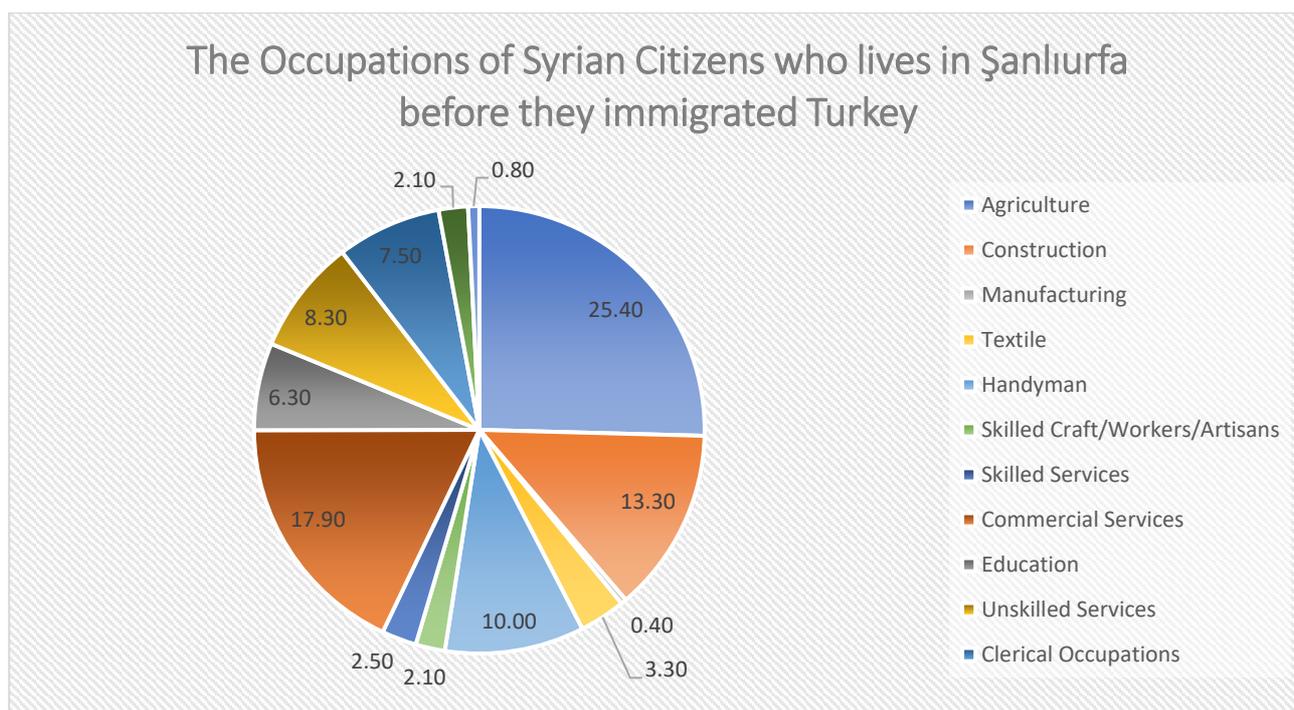
Source: ILO, 2016

As can be seen in the graphic above, 65% of the employers participating in the research stated that they could not find a qualified workforce. In this context, the best development that can be done is to determine the market needs and to train vocational and language skills for the qualifications to be sought.



Source: ILO, 2016

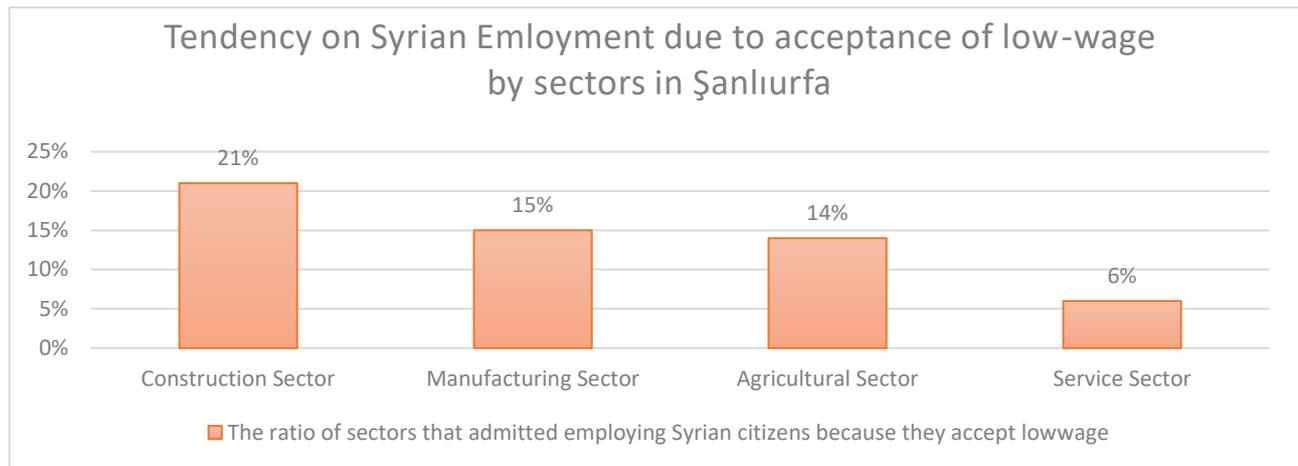
In the distribution of the same problem by sectors, the same problem is mostly experienced in the manufacturing and service sectors. In this context, sectors such as shoemaking, which is one of the traditional branches of work in Syria, provide an advantage. Footwear production has made significant strides under the textile and manufacturing sector in Şanlıurfa. Among the Syrian citizens, those who have this qualification should be integrated into this sector in Şanlıurfa or the necessary training should be given to ensure this integration.



Source: Turkish Red Crescent, "Livelihood Transition of the ESSN", August 2020

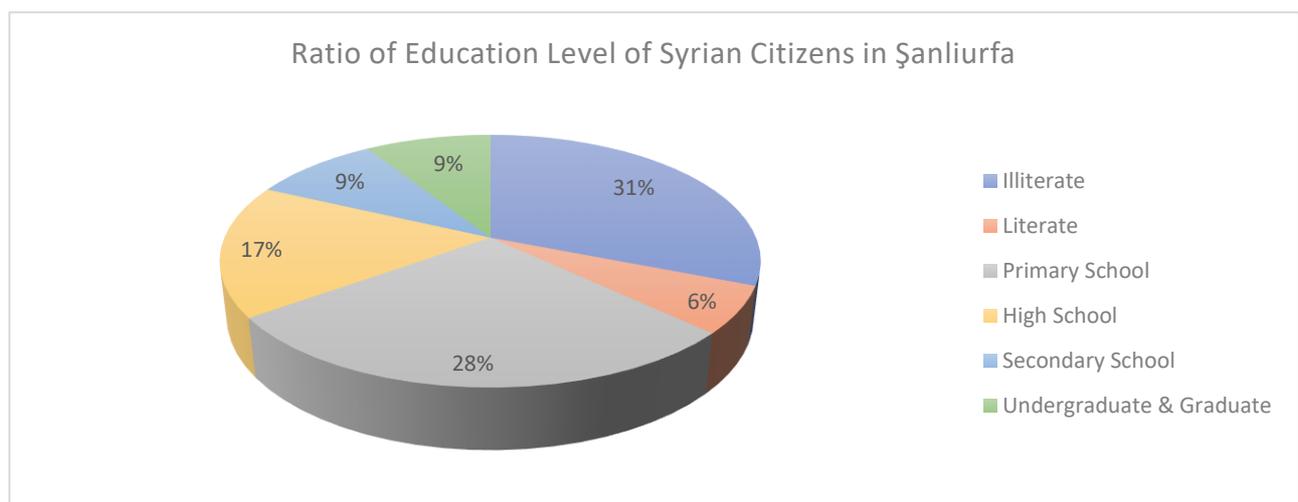
This chart presents a good point by showing the occupations of Syrian citizens who live in Şanlıurfa before they immigrated Turkey. This study was carried out by forming a focus group study by the Turkish Red Crescent. In this context, intensity can be seen especially in the fields of agriculture, construction and trade.

On the other hand, the motivation behind the Syrian employment for enterprises is based on the low costs as stated in the ILO’s report. These conditions cause the formation and having a tendency of informal sectors. The most effective ways to prevent these formations are to increase the support and incentives to raise awareness, improve vocational skills, and thus keep the labor market in a formal framework.



Source: ILO, 2016

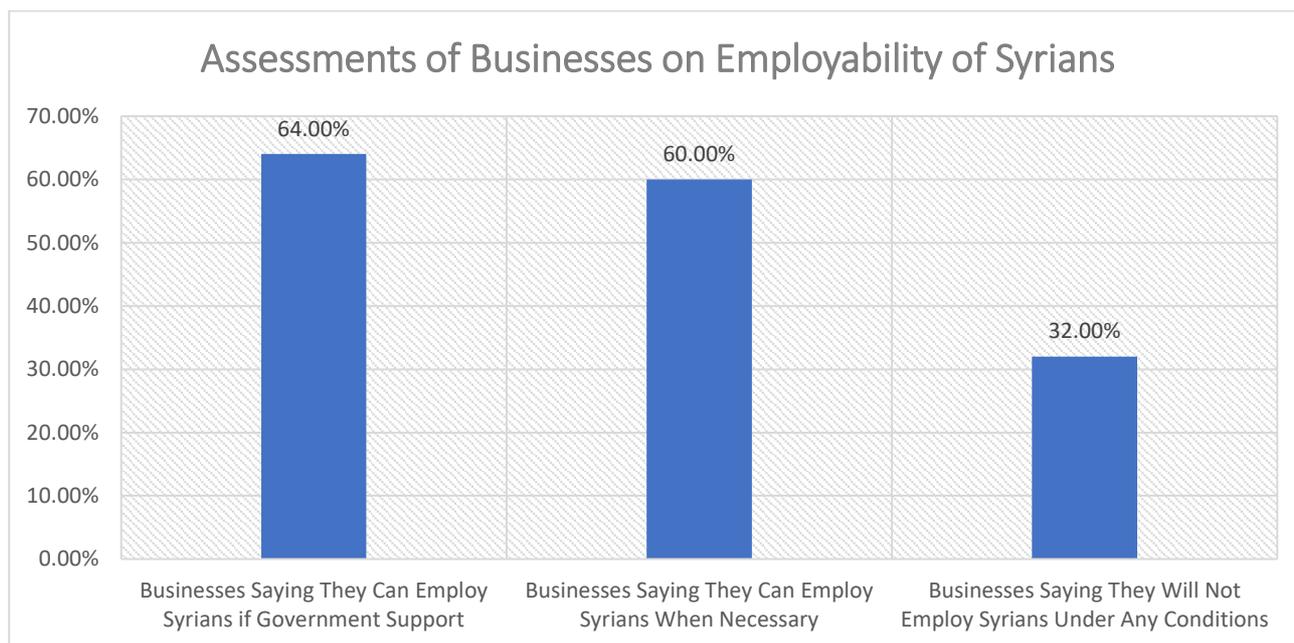
The data above brings an important analysis point. The sectors given in the chart above are those that tend to employ Syrians with low wages. In a way, it might reflect a shadow of the informal economy and sectors data of Syrian employment in the Şanlıurfa labor market. Apart from this, the reasons why Syrians tend to accept low wages are the lack of their livelihood options and the idea of not being able to perform skilled jobs. In a focus group study conducted by Turkish Red Crescent, it is revealed that most of the Syrian citizens living in Şanlıurfa are having the level of illiteracy. In this context, the effectivity of the livelihood projects to be planned in the future is based on forming an educational and skills training structure in the projects.



Source: Turkish Red Crescent, “Livelihood Transition of the ESSN: Capacity Mapping and Understanding the Potential”, 2020

Again, as a remarkable element in the report published by the Red Crescent, the education levels of Syrian citizens residing in Şanlıurfa provide an important level of analysis. It can easily be seen that there is a directly proportional relationship between education level and job wages. Education level should be clearly understood that is very important for the sustainability of livelihoods. As can be seen in İŞKUR data, there are many labor deficits that can be filled in many sectors for instance.

On the other hand, one of the most important resources for increasing Syrian employment is state support and incentives. In this context, the support of local and international non-governmental organizations is also carrying a crucial factor. Again, in the research conducted by the ILO, it is demonstrated that employers view Syrian employment positively if there is state support.

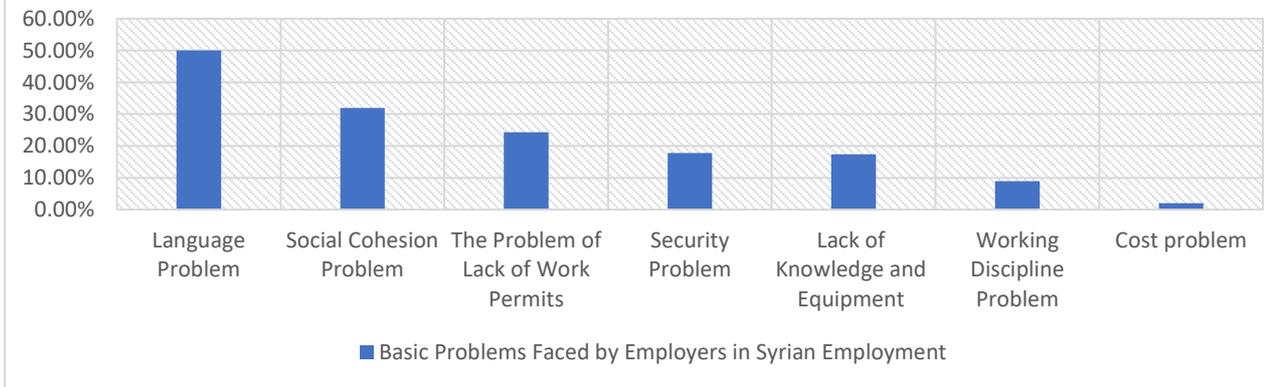


Source: ILO, 2016

As a result of the interviews made within the scope of the focus group study conducted by the ILO, 64% of the enterprises stated that they look favourably on Syrian employment if they have government incentives and support. Another noteworthy element in this graph is the 32% rate of enterprises that do not favor Syrian employment under any circumstances. In this context, state support becomes very important. Therefore, local and international institutions should work with the state in this framework in order to successfully support the labor market.

Moreover, the problems faced by businesses regarding Syrian employment, apart from the education level and qualified workforce issues, provide important content analysis for future livelihood projects. In this context, the most common problem is the language and social cohesion problem.

Basic Problems Faced by Employers in Syrian Employment



Source: ILO, 2016

Many training programs for Syrian citizens are currently being held on in order to overcome the basic problems faced by businesses in Şanlıurfa. The biggest supporters of these processes are surely non-governmental organizations. However, especially with the Covid-19 process, trainings were interrupted or delayed. In this context, online trainings should be maintained since the problems mentioned above yet encountered in the labor market. There is still a problem especially on the language problem and social adaptation problem. The ability to practically overcome this issue depends on the work and support of non-governmental organizations.

Covid-19 Update – The labor market difficulties have been experienced in Turkey took place in a more intense way in Şanlıurfa since the beginning of Covid-19. Especially, the concentration of workforce in the labor-intensive sectors has been maximized the risks of Covid-19 for employees, which is not a small number. More, it is observed that decreasing business volumes in many sectors have led to many layoffs. Even if approximately 500 million TL of support has been provided by the government since the beginning of the process, the labor market could not benefit from this entirely. In this framework, employers have applied for short-term work allowances in order to prevent layoffs. However, the uncertainty, which is the very nature of pandemic in every aspect, in the business markets has prevented new employment formations, and hence hiring processes has come to a stopping point. In particular, Syrian citizens, who are already in a position of a vulnerable community, were affected more by this situation and had huge difficulties in accessing sustainable livelihood sources. For this very humanitarian issue, they need urgent and sufficient support.

VI. Key Findings of Field Research

6.1 Key Informant Interviews

Orange Organization conducted limited field studies within the scope of Şanlıurfa labor market assessment. In this context, important perspectives and analyses were obtained that ensures sound understanding of the dynamics of labor market in Şanlıurfa. However, the field research could not be done comprehensively and remained limited due to Covid-19. In this context, very useful meetings that provide significant perspectives were held with international institutions, non-governmental organizations and government institutions that have field of working in Şanlıurfa. In addition, studies were carried out on aspirant entrepreneurs and surveys were conducted with 22 people in this context. In total, the surveys were conducted with 5 Syrians and 17 Turkish, and 8 women and 14 men by gender took part in this focus group study. The content of surveys consisted of the difficulties faced in the labor market and the effects of the Covid-19. In this context, the general difficulties experienced in the labor market stated by the interviewees are mostly as following;

- Income shortage,
- Their work experiences not being considered as sufficient,
- Lack of capital,
- Lack of knowledge about Turkish law and regulations for business,
- Language problem (especially for Syrian interviewees),
- Patronage relationships in the labor market,
- Salary imbalance.

When the effects of the Covid-19 process were investigated, it was mostly stated that there was a general decrease in the income level. Moreover, the currently performed high unemployment rate in the city has deepened with the Covid-19 period. In this context, the main factors that the interviewers stated within the scope of the effects of the Covid-19 processes are mostly as following;

- Difficulty in finding a job,
- Non-payment of wages,
- Uncertainty,
- The labor market coming to a standstill,
- High risks of being infected,
- Insufficient supports.

It should be taken into consideration that most of the interviewers for both Syrian and Turkish citizens involved in the food and textile sectors. Many of the aspirant entrepreneur interviewers stated that they can establish and maintain their own businesses if the required supports are made.

Orange Organization also held interviews with private work owners. In this context, employers stated that they were negatively affected by the Covid-19 process in every sense and they also stated that their income has decreased. General difficulties that private work owners face in the market are mostly as following;

- Absence of a stable financial situation,
- Lack of qualified workforce,
- License and registration procedures,
- A high amount of rents,
- Marketing strategies,
- Unstable currency,
- High taxes.

6.2 Business Survey

Orange Organization obtained very important and useful information in the meetings with the Governate of Şanlıurfa, Şanlıurfa Metropolitan Municipality, İŞKUR, Chamber of Artisans, Chamber of Commerce, Karacadag Development Agency and many non-governmental organizations in Şanlıurfa. In the interviews held in the general context, the negative effects of the Covid-19 in Şanlıurfa labor market is stated always and pointed out the necessity of support. However, it was also stated that during the Covid-19 period, the health, hygiene and textile sectors turned the crisis into an opportunity and gained huge momentum. During the meetings with these institutions, the general problems experienced in the Şanlıurfa market were expressed as follows;

- Lack of qualified workforce,
- Insufficient physical and technological infrastructure,
- Slow regional development,
- Insufficiency of the nonindustrialized agriculture sector,
- Problems faced in logistics and transportation,
- Lack of digitalization,
- Lack of foreign investments despite high incentive rates.

On the other hand, the sectors that are developing and expected to develop within the scope of the incentive rates in Şanlıurfa are as following;

- Agriculture and agriculture-based industry,
- Textile,
- Food,
- Logistics,
- Construction materials and chemicals,
- Renewable energy,
- Tourism.

The service mapping in Şanlıurfa was also created in the field research carried out by the Orange Organization. According to this, most active non-governmental organizations which work under livelihood projects are as following;

DRC	World Vision	Turkish Red Crescent	Concern
RIZK	Care	UNDP	IOM

Moreover, many other organizations supported by these organizations are also working in the Şanlıurfa field in the framework of livelihood. Establishing communication channels with these organizations, organizing joint studies and exchanging information will ensure the effective implementation and success of future livelihood projects within the scope of the labor market. Even though communication channels have been limited due to the Covid-19 process, Orange Organization maintains these efforts in order to strengthen relations and provide opportunities for more people.

Information on companies that employ Syrians was also obtained during the field research. In this context, establishing communications with these companies listed below will provide important data and analysis opportunities for future livelihood projects. The names of companies employing Syrians obtained in the framework of research are listed below;

- Maxi Milano Tekstil,
- Miray Tekstil,
- Mosi Tekstil,
- Decent Moda Tekstil,
- Adil Konfeksiyon,
- TR Denim Tekstil,
- Termosan Çelik,

- Eylül Medya Tekstil,
- Akipek Polyester,
- Bera Tekstil,
- Glamour MYM Tekstil,
- Pinteks Tekstil,
- Karbel Tekstil.

VII. Guidance for Future Programming

The data are given in this assessment, which serves as a guide for the livelihood projects that are aimed to be implemented in the future, constitute an important level of analysis. When the entire report is examined, the factors to be considered for the targeted projects become clear. The key findings analyzed in this Labor Market Assessment can inform the livelihood programming of ongoing and for the future in Şanlıurfa. Based on quantitative and qualitative data collected, the Covid-19 updates, market research tools, business surveys, key informative interviews are key points to be evaluated while developing a programme.

When this report is analyzed in a holistic approach, the first clearly striking analysis regarding the Şanlıurfa labor market is the difficulties experienced in the education and qualified workforce. Therefore, support is needed for education, vocational training and skill trainings. In addition, support should be given to capacity building efforts of developing sectors.

Suggestions that this assessment finds useful are as below;

- Supporting the job market for those negatively affected by the Covid-19 period,
- Enabling the sectors to increase their capacities by implementing modern digitalization processes,
- Increasing support for SMEs that are open to Syrian employment,
- Developing vocational trainings in areas where women can be employed regularly outside of traditionally women's professions (such as sewing, cooking, hairdressing, etc.)
- Providing trainings about Turkish law and regulations,
- Integrating Syrian employment into developing sectors in Şanlıurfa,
- Identifying the qualifications required by labor market and opening training programs accordingly,
- Providing support and grants to successful aspirant entrepreneurs,
- Trainings of high-level business skills such as CV preparation, computer and software
- Establishing a networking system for Syrian citizens to have easy access to the Şanlıurfa labor market

Apart from this, especially in the data published by İŞKUR, it is analyzed how important the content of the Economic Empowerment training organized by the Orange Organization is. It is recommended that such trainings should be maintained at least until an improvement in the labor market is achieved.

This assessment combined theoretical perspectives with practices and reached useful and practical key findings and provided important analyzes for the Şanlıurfa Workforce assessment. From these key points, livelihoods programs are expected to achieve successful results. It is recommended to hold one-on-one interviews and consultations on the labor market, when deemed necessary, to obtain more information and to reach analysis.

The network, trainings, workshops, briefings and interviews focusing on developing skills and professionalism are expected to assist especially the young population in finding employment. Entrepreneurship is an important investment that must be supported by livelihood projects. The key point in entrepreneurship is to provide the ability to analyze the relationships between product and market from a technical point of view. These skills provided in trainings can promise capacity development and employment for the labor market. Last but definitely not the least, increasing financing devoted to humanitarian needs in the framework of livelihoods has carrying out definitely vital importance. The Covid-19 pandemic process is changed almost everything in Turkey as well as in everywhere. In most of the countries, the economic recession is expected to take a place in the following year. As it is mentioned above in the findings of the Covid-19, the uncertainty of the future carries a vagueness for all. For this basic reason, all kind of support should be maintained also in the post-Covid-19 period.