

# Improving Syrian Refugee Inclusion in the Turkish Economy

## How Can the International Community Help?

WORLD REFUGEE & MIGRATION COUNCIL RESEARCH REPORT

September 2021

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IGAM  ACADEMY



## Acknowledgements

This research report was produced by the authors below with the IGAM Academy for the World Refugee & Migration Council's [Syrian Refugees in Jordan and the Region](#) project with support from the International Development Research Centre.

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The World Refugee & Migration Council is supported by a partnership with Cuso International.

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## Acronyms

AFAD	Disaster and Emergency Management Presidency, Turkish Ministry of Interior
DGMM	Directorate General of Migration Management, Turkish Ministry of Interior
ECHO	European Civil Protection and Humanitarian Aid Operations
ESSN	Emergency Social Safety Net
EU	European Union
FRIT	Facility for Refugees in Turkey
GC	Global Compact on Refugees
HLFS	Household Labor Force Survey
IGAM	The Research Centre on Asylum and Migration
ILO	International Labor Organization
LFIP	Law on Foreigners and International Protection
QIZ	Qualifying Industrial Zone
TURKSTAT	Turkish Statistical Institute
UNHCR	United Nations High Commissioner for Refugees

## Introduction

In the span of less than a decade, Turkey has become host to the largest refugee population in the world (UNHCR Mid-Year Trends, 2020). Currently, there are close to 3.7 million Syrians under temporary protection (SuTP) status with another 320,000 individuals under international protection (Republic of Turkey Ministry of Interior, 2021) (UNHCR Turkey Operational Update, 2021). Additionally, Turkey over the last few years has apprehended a growing number of irregular migrants, who are not accounted for by traditional durable solutions through local integration, resettlement, and repatriation.<sup>1</sup> In the meantime, refugees in Turkey, especially Syrians, are by default becoming increasingly self-settled and self-integrated. The process is multifaceted, complex, and mostly driven through the acquisition of Turkish language skills, interaction with local community members, sending their children to Turkish schools, inter-marriages, and employment.

This picture is leading to a growing recognition among local, national as well as international stakeholders of the need to move international support from humanitarian to more development-focused assistance. Key to this approach is improving the self-reliance of refugees and the resilience of their host communities in Turkey. Employment and the possibility of becoming self-reliant is recognized as the most important driver of integration and is also seen as an important vehicle for mainstreaming migration to development (Ager and Strang, 2008). In recent years, the Facility for Refugees in Turkey (FRIT), funded by the EU and UN's Regional, Refugee and Resilience Plans (3RP), have increasingly expanded their livelihood projects to draw away refugees from precarious informal employment to more sustainable, formal employment options. These projects have ranged from those focused on improving life skills, provision of language and vocational training for refugees to enhance their employability in the labor market, as well as provision of tax subsidies to employers. These have been accompanied by numerous projects to encourage self-employment and the creation of small businesses.

As much as these projects may have increased the “employability” of their beneficiaries, they have not, in fact, been translated into sustainable formal employment and job creation in any significant manner. Instead, most refugees in Turkey are employed informally, with all the accompanying problems of exploitation, precarity and threats to social cohesion. This is further complicated by the fact that the Turkish economy is nowhere near its level when

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<sup>1</sup> Irregular migration: Movement of persons that takes place outside the laws, regulations, or international agreements governing the entry into or exit from the State of origin, transit or destination. The term is generally used to identify persons moving outside regular migration channels. (IOM- Key Migration Terms)

Syrian refugees first began to arrive in 2011. Its GDP per capita has plummeted from its peak at almost US\$13,000 in 2013 to a little above US\$8,600 in 2019. Furthermore, the country's macroeconomic outlook is not expected to recover soon, following major fluctuations in economic growth as well as the onset of the COVID-19 pandemic.

The performance of the Turkish economy is volatile and demand-driven in its growth. Periods of strong credit growth are followed by widening current account deficits and high inflation. As the economy is highly dependent on capital inflows, it remains susceptible to sudden stops. Such exchange rate shocks translate into higher inflation rates because of a relatively strong pass-through.<sup>2</sup> The economic picture has been further aggravated by the COVID-19 pandemic. According to the IMF, Turkey's relief strategy stands out as one with one of the lowest rates of direct transfers, and the one of the highest rates of credit expansion (IMF Fiscal Policies Database, 2021).

In such a setting, improvements to the labor market, with its chronic structural problems — such as high informality, low skill sets among the labor force, and low labor force participation rates for women — becomes particularly challenging. It is estimated that currently 3.3 million workers in Turkey earn the minimum wage and that 4.1 million workers earn less than the minimum wage, excluding Syrian refugees for whom no comparable data exist.<sup>3</sup> Formal jobs are more difficult for the workers with relatively lower skill sets to secure, such as young people, women, and Syrian refugees, who face additional restrictions such as meeting residency requirements and obtaining degree equivalence. Furthermore, policies that might protect workers with lower skill sets, such as increasing the minimum wage, provoke shifts from formal to informal employment, resulting in worse working conditions for the very workers for whom these policies are aimed (Bakis, İlhan, Polat, and Tunali, 2020).

In an economy where informality is merely a reflection of the underlying structural problems of the national labor market and accessing formal jobs remains unreachable for a significant proportion of people in host communities, graduating refugees from an informal job market to a formal one will remain a major challenge.<sup>4</sup> As such, the current policy of subsidizing formal employment does not address the underlying causes of informality. Thus, refugees are left to their own means once subsidies run out. As discussed below, the number of formal

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<sup>2</sup> When the exchange rate deteriorates, prices of imported intermediate goods are directly affected, causing increases in the prices of the domestically produced final goods that use them.

<sup>3</sup> Authors' calculations using the Household Labor Force Survey of TurkStat.

<sup>4</sup> Workers who are informally employed in Turkey are working without official labor contracts, and are not registered at the Social Security Institution. Therefore, they are not protected by labor market regulations, such as the minimum wage, retirement benefits, or health and safety measures.

jobs created via this policy remains very limited. This report will argue that it might be more beneficial to adopt an economic development approach to address the underlying conditions that give rise to informality and explore ways in which labor markets can be restructured to minimize informal employment for refugees and host communities alike. One such policy, for example, would be to decrease taxes on labor for all workers. Such a policy would facilitate the transition from informal to formal jobs, with an added benefit of potentially easing public resentment toward the high labor taxes on formal jobs that increase the appeal of the informal labor market.

This report will also advocate to improve the prospects of access to sustainable livelihood for refugees by emphasizing the role of the international community to help to create demand for refugee labor in Turkey in a manner that benefits the host community as well. One starting point would be to explore extending preferential trade arrangements for countries hosting a large number of refugees to help spur employment both for refugees and locals, as advocated by the Global Compact on Refugees (GCR) as well as the World Refugee & Migration Council (UNHCR Global Compact on Refugees, 2018) (WRC, 2019).<sup>5</sup>

One challenge, amongst others, is that the implementation of these policies would imply a formal and public recognition that most of the Syrian refugees would not be returning to Syria and that they have become settled in Turkey for the long-term. How to mitigate this highly politicized issue, as well as the increasingly negative public sentiment against the ongoing presence of Syrian refugees, is a priority for the Turkish government. Hence, the economic gains to the host community as well as the prospective benefits to social cohesion between the refugees and the host community resulting from inclusion, as opposed to the sociopolitical problems that would emerge from the persistent exclusion of refugees, will need to be demonstrated effectively.

This is where the other policy suggestions from the GCR become important, ranging from revamped resettlement, including advocacy for a “comprehensive plan of action” for resettling Syrian and Afghan refugees in substantial numbers, to exploring avenues of voluntary and safe return, as well as continued funding for humanitarian assistance for refugees in Turkey and for IDPs amassed on the Turkish border. This report will argue that incorporating these policies into developing an international response might best emerge in the context of a revision of the EU-Turkey statement of March 2016, as well as exploring the idea of establishing a “qualifying industrial zone” (QIZ) near the Syrian border for companies prepared

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<sup>5</sup> The World Refugee & Migration Council was originally known as the World Refugee Council (WRC).

to employ refugees formally in order to benefit from preferential trade to developed countries beyond the EU.

The report is divided into four sections. The first section offers a brief review of the current state of the Syrian refugees in Turkey and the macroeconomic environment of the Turkish economy in which they find themselves. The second section surveys government policies towards refugees with respect to the legal status of refugees as well as access to public services and the labor market together with evolution of public opinion towards refugees. This section also discusses the impact that refugees have had on the Turkish economy (labor market, public expenditures, inflation, housing market, etc.). The third section discusses the impact of international assistance programs, such as FRIT and 3RP, on the government's ability and willingness to support refugees, and pays particular attention to expanding their social and economic inclusion and efforts to support social cohesion. The final section assesses the long-term prospects for Syrian refugees in Turkey and offers policy recommendations for Turkey and the international community to improve the integration of refugees and provide support to Turkey with the increasing burden of hosting refugee populations.

This report is based on primary sources of data as well as secondary sources of analysis. The primary sources are the latest data provided by Turkish state institutions, such as the Turkish Statistical Institute (Turkstat), the Directorate General of Migration Management (DGMM) and Household Labor Force Survey (HLFS) and UN agencies, such as the ILO, UNHCR and UNDP, as well as the European Commission's regular FRIT monitoring reports. However, one important caveat is that data on refugees in Turkey remains limited. Furthermore, data from different sources can sometimes be incompatible. As such, we report the statistics and clearly indicate their sources, and further prioritize using official statistics whenever available. The scarcity of data makes it difficult to design evidence-based policies.

Secondary sources include reports by Turkish academia, government agencies, and civil society. Analyses from these sources are supplemented by past interviews with government officials and representatives of civil society as well as international agencies held by the authors of this report. The report also benefits from the findings of the most recent as well as earlier public opinion surveys concerning Syrian refugees and the Turkish public published in Syrians Barometers (Erdoğan, M., 2020). One major caveat concerning Turkish government data is its limited nature especially with respect to local integration figures, work permits issued for refugees and labor force statistics for refugees. Therefore, data from other publicly available sources as well as expert estimates are also used to give a wider picture.

# Syrian and Other Refugees in Turkey: Overview

## Syrian Refugees under Temporary Protection

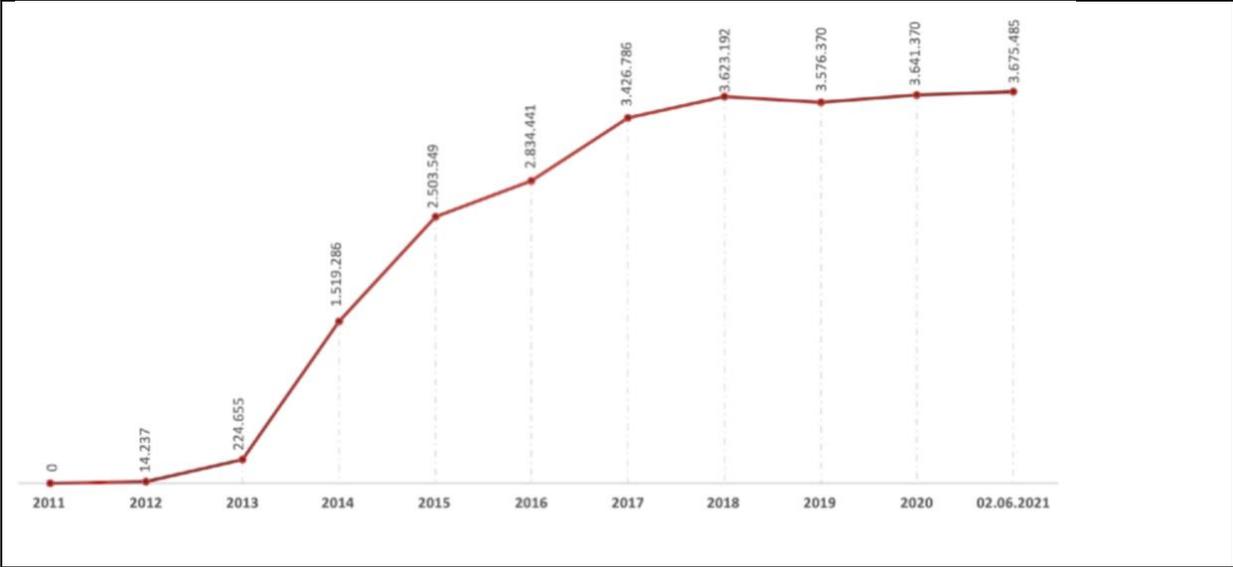
On April 29, 2011, the first group of Syrian refugees – totaling 252 – arrived in Turkey. As the Turkish government adopted an open-door policy there was a belief that the displacement would be a short-term crisis and Syrians, there under the status of temporary protection,<sup>6</sup> would return to their country shortly. By the end of 2011, the number of Syrians reached 14,000 and then shot up to 224,000 by late 2012. The arrival of ISIS (Islamic State of the Iraq and Syria) to Syria in 2014 and the subsequent escalation of the conflict led to a massive increase in the number of Syrian refugees in Turkey, as shown in Figure 1. The numbers had stabilized at around 3.6 million by 2018 and since then increases have been driven primarily by births of around 270 Syrian children per day, culminating to a population growth of about 650,000 Syrians since 2011. There have also been repatriations to Syria, though the voluntary nature of these returns has been contested and the relevant data are opaque. Repatriation has occurred in three pockets in northern Syria controlled by the Turkish military and its local allies. According to the Turkish Ministry of Defense, as of the end of 2019 more than half a million Syrians have gone back to these three areas (Republic of Turkey Ministry of National Defence, 2019).<sup>7</sup> The Ministry of Interior, however, puts the figure at closer to 420,000 as of early December 2020, whereas the UNHCR places the number of returns at just over 101,000 as of the end of 2020 (Mülteciler Derneği, 2021) (UNHCR Syria Regional Refugee Response, 2021). Turkey has also issued citizenship to Syrians since 2017 – the most recent declaration puts the figure at 150,000 Syrians naturalized (Milliyet, 2021). According to recent data, there are 94,803 Syrians living in Turkey with residence permits as of June 2021.

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<sup>6</sup> Turkey applies geographical restrictions for asylum seekers and refugees and these status assignments can be granted only to those who come from Europe. Turkey grants "conditional refugee" or "secondary protection" status to those coming from outside Europe. Turkey has granted "temporary protection" status for Syrians, both because they are from outside Europe and come *en masse*. This protection is a de-facto asylum-seeking status, but legally, it has different content.

<sup>7</sup>According to this source, 380,000, 135,000, and over 65,000 Syrians returned to the Euphrates Shield, Peace Spring Shield, and the Olive Branch operation zones, respectively (figures cited at 4:59; 5:45 and 10:11 minutes into the podcast.)

**Figure 1** Distribution of Syrians under Temporary Protection by Year in Turkey



Source: DGMM: <https://en.goc.gov.tr/temporary-protection27> (Access: 12.06.2021)

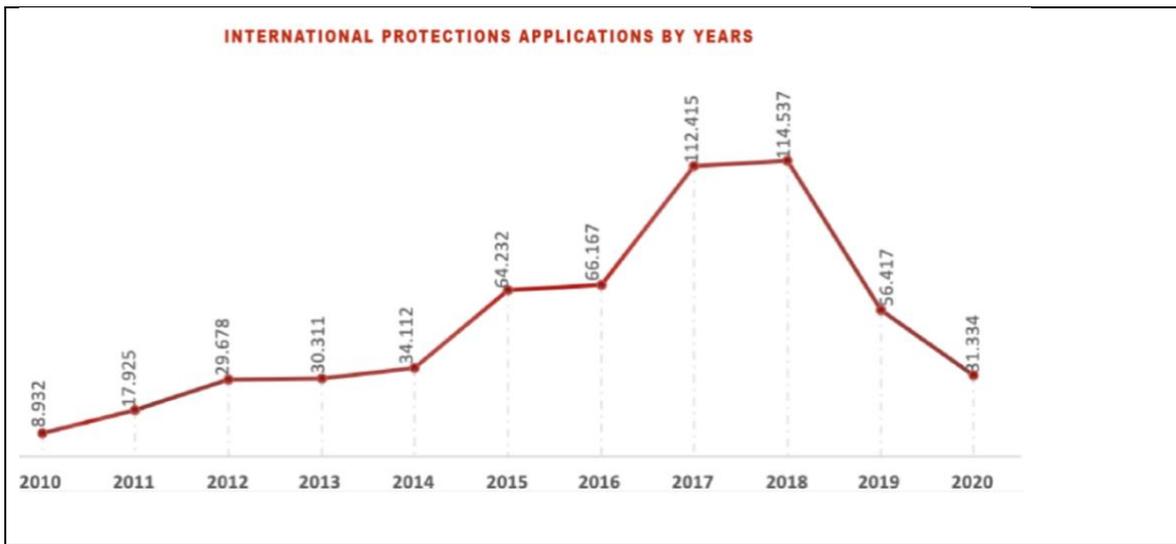
### Migrants in Turkey

Besides the Syrian refugees who first began to arrive between 2011 and the end of 2020, Turkey had received close to 560,000 asylum applications (see Figure 2) (Republic of Turkey Ministry of Interior, 2021). As of early 2021, the top three countries of origin were Iraq, Afghanistan and Iran, respectively, with 173,000, 116,000 and 27,000 asylum seekers granted protection (UNHCR Turkey Fact Sheet, 2021). In accordance with the “geographical limitation” that Turkey maintains to the 1951 Geneva Convention and in line with the provisions of the LFIP, these asylum seekers whose cases have been adjudicated and accepted are granted “conditional refugee” status until their resettlement to third countries.<sup>8</sup> So far Turkey has granted fully-fledged refugee status to only 28 persons (Bulur, 2019). However, the shrinking number of resettlements from Turkey culminates in an ever-growing number of “international

<sup>8</sup> Turkish authorities do not provide data regarding individuals granted “conditional refugee” status nor details of the number of cases accepted or rejected, or their breakdown by nationality.

protection holders or applicants,” including conditional refugees, in Turkey.<sup>9,10</sup> According to the UNHCR, as of January 2021, there are 320,000 persons benefitting from “conditional refugee” status. UNHCR transferred its long-standing refugee status determination task to the DGMM in September 2018 (UNHCR Turkey Operational Update, 2018).

**Figure 2** International Protection by Years in Turkey (2010-2020)



Source: DGMM: <https://en.goc.gov.tr/international-protection17> (Access: 12.06.2021)

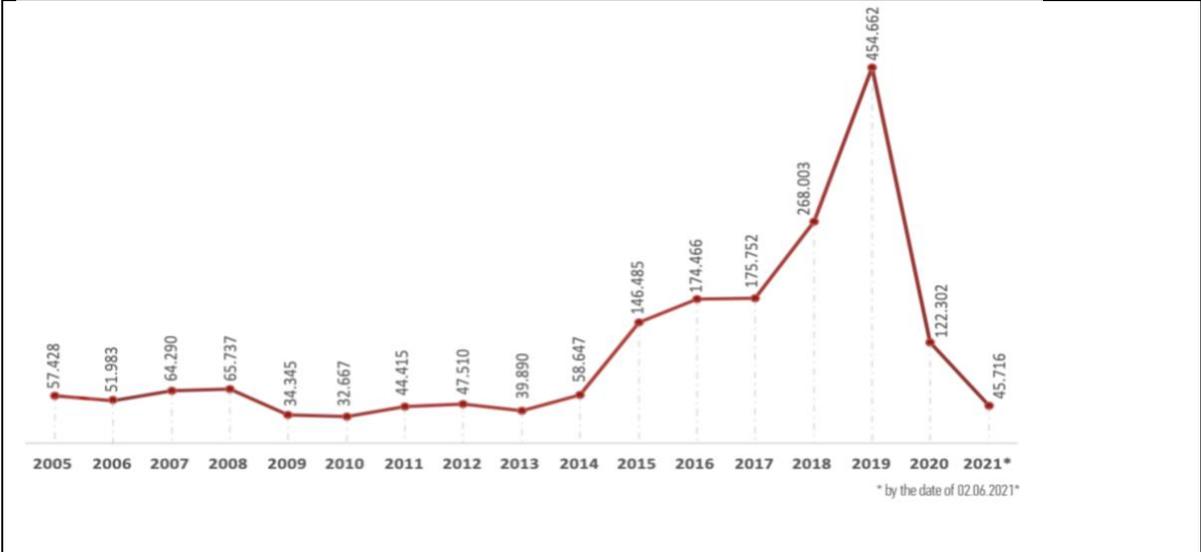
This picture is further complicated by the pool of irregular migrants, whose size is naturally difficult to estimate. Especially since 2014, the most important reason for the influx of irregular migrants has been the instability in the region after 2011 and the weakened border security. The second important reason is Turkey's positive policy implementations toward immigration, both as a state and as a society. A third factor is that Iran does not prevent

<sup>9</sup> Conditional Refugee: (LFIP Article 62) A person who as a result of events occurring outside European countries and owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his nationality and is unable or, owing to such fear, is unwilling to avail himself or herself of the protection of that country; or who, not having a nationality and being outside the country of former habitual residence as a result of such events, is unable or, owing to such fear, is unwilling to return to it, shall be granted conditional refugee status upon completion of the refugee status determination process. Conditional refugees shall be allowed to reside in Turkey temporarily until they are resettled to a third country.

<sup>10</sup> Between 2017 and May 2021, the UNHCR made 60,000 submissions for resettlement. Only 40,000 refugees were resettled, <https://www.unhcr.org/resettlement-data.html>. The EU-Turkey statement of March 2016 had referred to the prospect of 72,000 Syrian refugees being resettled from Turkey of which, as of March 2020, only 27,000 had been realized. It is not clear if this figure is included in the one declared by the UNHCR, “EU-Turkey Statement Four years on,” March 2020, p. 2, [https://ec.europa.eu/home-affairs/sites/default/files/what-we-do/policies/european-agenda-migration/20200318\\_managing-migration-eu-turkey-statement-4-years-on\\_en.pdf](https://ec.europa.eu/home-affairs/sites/default/files/what-we-do/policies/european-agenda-migration/20200318_managing-migration-eu-turkey-statement-4-years-on_en.pdf).

immigrants who want to go to Turkey. As can be observed from Figure 3, there were more than 1.5 million irregular migrants apprehended by Turkish authorities between 2011-2021. The trend has been upward reaching an impressive peak in 2019 in spite of a 1000 km long border wall. Subsequently, the numbers in 2020 have fallen partly as a function of the COVID-19 pandemic. Based on the number of apprehended irregular migrants and interviews with government officials, one expert estimated that in February 2020, the number of irregular migrants in Turkey to be “no less than one million” (Erdoğan, M. in *Perspektif*, 2020). He cautiously notes that the government may have been able to send back only about 20 percent of irregular migrants to their countries of origin.

**Figure 3** The Number of Irregular Migrants – by Years in Turkey



Source: DGMM: <https://en.goc.gov.tr/irregular-migration> (Access: 12.06.2021)

## The Macroeconomic Picture

Turkey, with a population of 83 million, has hosted more than 5 million Syrian and other refugees and irregular migrants since 2015. This number is more than 5 percent of Turkey's population, a significant figure to manage and integrate into Turkey's economy considering that it is greater than the population of several European countries, such as Latvia, Lithuania, Slovenia, and Albania (European Commission Demographic Balance, 2020). Providing humanitarian aid to a group of this magnitude poses a colossal economic burden on the host community despite being mitigated by the international support.<sup>11</sup> Unsurprisingly, more emphasis has been and continues to be placed on enabling refugees to become self-reliant through employment. However, labor market integration can also prove challenging in a developing country that struggles with its own macroeconomic problems.

Turkey's capacity to manage migration and enable Syrian refugees to access employment and possibilities for livelihood is intimately tied to the state of the Turkish economy. The basic economic indicators of the Turkish economy are provided in Table 1. The data pertains to three different time periods: 2011 provides a brief outlook of the economy at the beginning of the Syrian mass migration; 2019 summarizes the macroeconomic situation preceding the pandemic; and 2020 is the most recent data available. Most striking in this table is the decline in GDP per capita in Turkey from US\$11,200 in 2011 to US\$8,600 in 2020.

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<sup>11</sup> Official statements from Turkey indicate that more than \$40 billion has been spent on Syrians since 2011. However, no specifics are given. The most important external financial support to Turkey came from the EU after 2016. After 2011, it is estimated that the total foreign resource coming to Turkey for refugees is around 7-8 billion dollars. According to the 2016 agreement, another 2 billion euros is expected from the EU.

**Table 1** Basic Macroeconomic Indicators

Indicator	Unit	Value		
		2011	2019	2020
Area	Thousand km <sup>2</sup>	770		
Population	Millions	75	83	84
GDP	Billions (current US\$)	839	761	720
GDP	Billions (PPP-current international \$)	1,454	2,472	2,546
GDP per capita	Thousand (current US\$)	11.2	9.2	8.6
Exports (goods+services)	Billions (current US\$)	193	249	
Unemployment rate <sup>12</sup>	Percent	8.8	13.7	13.2
Labor force participation rate	Percent	49.3	53.0	49.3
Absolute poverty <sup>13</sup>	Percent	4.0	2.2	

**Source:** International Monetary Fund, World Economic Outlook Database, April 2021, and World Development Indicators, <https://www.imf.org/en/Publications/WEO/weo-database/2021/April/select-subjects?c=186>, <https://databank.worldbank.org/source/world-development-indicators>

At this point, it is important to note that Syrian refugees are absent from these macroeconomic statistics.<sup>14</sup> The population statistics exclude Syrians, and so do various macroeconomic measures. For a brief glimpse of its effects on these statistics, consider the following: the nominal GDP per capita is US\$8,600 (Turkish Statistical Institute, 2020). If we were to include approximately 4 million Syrians under temporary protection in Turkey, the GDP per capita would fall to US\$8,200.

The Turkish economy's growth performance has been volatile in the past decade as it has suffered from sizeable booms and busts. This was caused by a set of macroeconomic policies dominating the past decade that relied predominantly on stimulating domestic

<sup>12</sup> The labor market statistics for 2011 and 2019 are taken from the World Bank Indicators database. The 2020 statistics are taken from the Turkstat's website. <https://data.tuik.gov.tr/Bulten/Index?p=Labour-Force-Statistics-February-2021-37487>, accessed on May 3, 2021.

<sup>13</sup> The absolute poverty statistics are taken from the World Bank Indicators database. They represent the share of the population that has less than US\$3.20/day. The relative poverty statistics and the Gini coefficients are taken from the TurkStat's website. They represent the share of households with household income equivalent to less than 50 percent of the median. <https://data.tuik.gov.tr/Bulten/Index?p=Income-and-Living-Conditions-Survey-2019-33820>, accessed on May 3, 2021.

<sup>14</sup> Syrians who have become Turkish citizens and individuals with residence permits in Turkey are included in the official statistics. Note that their numbers are relatively few.

demand. This growth policy has benefited from generous capital flows following the Great Recession of 2008, lowering borrowing costs considerably, and thereby financing a massive credit expansion as well as surges in consumption and government spending (Acemoğlu and Üçer, 2020) (Yazgan, 2020). This growth strategy, however, failed to create total factor productivity growth and resulted in increasing inflation rates and a widening current account deficit (Acemoğlu and Üçer, 2020) (Pamuk, 2020). As the economy remains highly dependent on capital inflows to finance its growth, interventions in monetary policy as well as domestic and international political events translate into sudden jags, exchange rate fluctuations, and adversely affected inflation rates, given that production in Turkey relies on imported intermediate goods (Yeşilada, 2020).<sup>15</sup>

The failed coup attempt in the summer of 2016 caused a deep recession in the Turkish economy. Once again, various policies, including credit expansion and government subsidies to firms, were enacted to stimulate domestic demand, which helped bring down unemployment rates in 2017 and 2018. As expected, the economy overheated, the current account deficit expanded, and inflation exceeded 20 percent by 2018. A severe exchange rate shock hit in August 2018 (Yazgan, 2020). Even though domestic demand remained relatively weak, this exchange rate shock translated into relatively high inflation rates, reaching 25 percent in the period that followed because of the relatively high import content of the production processes in Turkey, that is, the pass-through (Demiralp, 2020). The economy entered a recession in the last quarter of 2018; meanwhile, banks had a relatively high percentage of non-performing loans that were masked (World Bank, 2021).

The grim macroeconomic outlook took its toll on the labor markets as employment plummeted, first in the construction sector and later in the manufacturing and the service sectors. Unemployment rates rose to 11 percent in 2018 and 13.7 percent in 2019 (Turkish Statistical Institute, 2021). Persistently high levels of unemployment rates also led an increasing number of people to drop out or to be discouraged from trying to enter the labor market.

In short, the Turkish economy was already suffering from relatively low growth rates due to intensifying macroeconomic imbalances and their repercussions on the labor market when the pandemic hit in early 2020. The government's response to the pandemic was marked by a relatively low amount of direct transfers (1.1 percent of GDP), and a relatively high share of

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<sup>15</sup> The international political events one might call to mind involved the downing of the Russian jet in 2015, the failed coup attempt in July 2016, the presidential elections followed by local elections that had to be repeated in Istanbul, the diplomatic rift focused on the American pastor, Andrew Brunson.

credit (9 percent of GDP) (IMF Fiscal Policies Database, 2021). In other words, the government engaged in massive credit expansion, once again, eventually causing the inflation rate to soar and the current account deficit to widen (World Bank, 2021).

Even though Turkey succeeded in achieving a positive growth rate of 1.8 percent in 2020, this was mainly because of a relatively large contraction during the pandemic (Bakış and Dilek, 2021).<sup>16</sup> The low interest rates caused further dollarization and a weaker exchange rate that had depreciated by 30 percent by the end of 2020 (World Bank, 2021). The response of the Central Bank was not to tighten the monetary policy, but rather to sell its dollar reserves, increasing the risk premium of Turkey in international financial markets as well as the vulnerability of the Turkish economy (Demiralp, 2021).

The labor market was also adversely affected by the pandemic. Though the official unemployment rate came down from 13.7 percent in 2019 to 13.2 percent in 2020, this was primarily driven by a collapse in labor force participation rates that had started in 2019 and that were exacerbated in 2020. As of February 2021, 4.2 million people are unemployed and another 3.7 million people are no longer searching for jobs and thus remain out of the labor market even though they would like to work.<sup>17</sup> These figures do not include the Syrians under temporary protection and undocumented migrants.

Overall, the labor market effects of the pandemic have been asymmetric, aggravating the already stark differences in labor market outcomes across different groups. Workers with lower skill sets, the self-employed, the unemployed, and the refugees were more vulnerable. Yet, the policies enacted in Turkey to mitigate the adverse effects on the economy did not address these differences.

Government aid packages prioritized the formally employed during the pandemic. The government's aid package contained limited help for owners of firms (the self-employed and the entrepreneurs). These individuals were given the opportunity to postpone their existing credit payments and/or take out more credit. They could also benefit from short-term work allowance programs and direct transfers from the government (albeit limited) when

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<sup>16</sup> The GDP had contracted by 11 percent in the second quarter (quarter-on-quarter) of 2020.

<sup>17</sup> According to international definitions, individuals can be classified as unemployed only if they have searched actively for a job in the referenced month. However, there are individuals who state that they would like to work, and that they are available to start working in two weeks, yet they are not currently looking for jobs. There are alternative measures of unemployment that take this category of individuals into account. These alternative measures have become more important during the pandemic, given that many individuals stopped looking for work. <https://betam.bahcesehir.edu.tr/wp-content/uploads/2021/04/IsqucuGorunum2021M04.pdf>

furloughed. In April 2020, a ban on the firing of those formally employed was introduced.<sup>18</sup> Contrary to measures taken by EU countries to protect unemployed workers, no such measures were taken in Turkey for similarly vulnerable groups. The government in Turkey thus chose to protect the formally employed, while neglecting those with informal employment (both wage earners and self-employed workers) and the unemployed (Uysal, 2020) (TESEV, 2020). The informally self-employed, including many unregistered Syrian-owned businesses and their employers, could not benefit from these government aid measures although they were in considerable precarity.

As a result, informal employment plunged during the pandemic and remained below its pre-pandemic level by about 700,000 workers at the end of 2020. Data show that the category of informal workers in the service sector took the hardest hit during the pandemic: not only the informal wage earners but also informal self-employers and unpaid family workers. Their employment levels are still close to 200,000 workers below pre-pandemic levels (Gürsel et al., 2021).

Contrary to IMF forecasts that the Turkish economy will grow by 6 percent in 2021 (IMF Turkey Projections, 2021), we feel that it is unrealistic to expect improvements in Turkey's structural macroeconomic problems or a labor market recovery, which will further jeopardize the access to formal employment opportunities for Syrian refugees.

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<sup>18</sup> The number of workers who remain furloughed remains unknown.

## Government Policies for Refugees, Labor Market Evolution and Public Attitudes

Turkey adopted an open door policy for Syrian refugees in 2011 largely because of the belief that the Assad regime in Damascus would be quickly replaced by a new government led by, or at least including, the opposition that Turkey supported (NTV, 2012). Additionally, a provision was made in the LFIP to allow the government to extend “temporary protection” to refugees fleeing repression and violence *en masse*, which also facilitated the introduction of the necessary bureaucratic and organizational measures to support the open door decision (Çorabatır, 2016).

The principles and legal basis for the open door policy were initially crafted in a somewhat piecemeal and improvisational manner, with a focus on humanitarian assistance and meeting the basic needs of the refugees (Batalla and Tolay, 2018). In October 2011, after the government broke off relations with the Syrian government, it announced the extension of temporary protection to the Syrian refugees.<sup>19</sup> The initial elements of this policy emerged in March 2012 and consisted of a commitment to an open door policy, respect for non-refoulement, and the provision of humanitarian assistance. It was the Disaster and Emergency Management Authority (AFAD) under the Prime Ministry that established and ran these camps, with the implementation of an emergency and disaster management plan. The number of camps in Turkey quickly reached 26, housing about 250,000 refugees as of the end of 2016. However, these numbers continued to increase and the government began to allow Syrians to reside outside the camps and locate in urban areas. This decision became an important turning point in the government’s management of the refugee situation as refugees began to move into cities practically all around Turkey, including Istanbul. Lacking control from any central planning, Syrians settled where they wanted and already by early 2014, the majority of these refugees lived outside camps.

It was in this context that the government finally issued a detailed regulation in October 2014 defining the terms of temporary protection and introducing the requirement that refugees must be registered to benefit from national health and other public services (Resmi Gazete,

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<sup>19</sup> For a more detailed description of the decision see “Syrian Refugees in Turkey: Briefing Note” Helsinki Citizens’ Assembly-Turkey, Refugee Advocacy and Support Program, November 16, 2012, p. 5, [http://www.hyd.org.tr/staticfiles/files/20121116\\_hca\\_turkey\\_briefingnotesyrianrefugees.pdf](http://www.hyd.org.tr/staticfiles/files/20121116_hca_turkey_briefingnotesyrianrefugees.pdf) and Ahmet İçduygu, “Syrian Refugees in Turkey: The Long Road Ahead,” Migration Policy Institute, April 2015, pp. 8-9, <https://www.migrationpolicy.org/research/syrian-refugees-turkey-long-road-ahead>.

2014).<sup>20</sup> However, the temporary protection regulation blocks the path to citizenship for Syrians and access to application for individual international protection. For this reason, the Turkish government grants "exceptional citizenship" to Syrians that are under temporary protection. Though this policy is politically very controversial, the government can, if it so desires, adopt legislation that could open the way to citizenship for Syrian refugees as a durable solution.

The picture changed once more after 2014, with the rise of ISIS and the intervention of Russia and Iran on behalf of the government in Damascus, greatly aggravating the humanitarian situation. These developments, as demonstrated in Figure 1, led to a dramatic increase in the number of Syrian refugees in Turkey. It also triggered the European migration crisis, where, in 2015 and 2016, more than a million refugees of Syrian and other origins poured into the EU via Turkey and other routes.<sup>21</sup> This culminated in the release of the "EU-Turkey Statement" in March 2016, which resulted in support from the EU to Turkey in the provision of financial assistance – eventually amounting to 6 billion Euros to support programs for Syrian refugees in return for Turkey introducing measures to prevent secondary migration toward Europe (European Commission, 2015) (European Council, 2016). The EU also promised to resettle one Syrian refugee for each irregular migrant that Turkey took back from the EU, to extend visa liberalization for Turkish nationals, and to restart Turkey's stalled EU accession process. This culminated in the establishment of the Facility for Refugees in Turkey (FRIT), which supports activities ranging from the construction of new schools, to strengthening protection capacity of a range of stakeholders in Turkey, to critical cash support programs such as the Emergency Social Safety Net (ESSN) and the Conditional Cash Transfer for Education (CCTE) programs (European Commission ESSN, 2021) (European Commission CCTE, 2021).<sup>22</sup>

However, beyond these programs addressing basic needs, there was a growing recognition of the need for programs to enable refugees to have access to real livelihoods. FRIT's updated strategic concept note called for programs "with a focus on providing sustainable socio-

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<sup>20</sup> The English description of the terms of the temporary protection regulation can be seen at "Temporary Protection Regime - Turkey," Asylum Information Database and European Council of Refugees and Exiles, <https://www.asylumineurope.org/reports/country/turkey/content-temporary-protection>.

<sup>21</sup> For exact figures, see: "Asylum and migration in the EU: facts and figures," European Parliament, June 30, 2017, <http://www.europarl.europa.eu/news/en/headlines/society/20170629STO78630/asylum-and-migration-in-the-eu-facts-and-figures>.

<sup>22</sup> For FRIT Projects, see: European Commission, "EU Facility for Refugees in Turkey: List of projects committed/decided, contracted, disbursed," [https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/facility\\_table.pdf](https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/facility_table.pdf). For an overall assessment of FRIT activities, see "Managing the Refugee Crisis, Facility for Refugees in Turkey: The Facility Results Framework Monitoring Report Output Achievement Progress" (Facility Tranche I) (Up to: 31 December 2018), European Commission, May 2019, [https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/190607\\_facility-monitoring-report-final.pdf](https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/190607_facility-monitoring-report-final.pdf).

economic support and livelihood opportunities within Turkey” (European Commission Facility for Refugees in Turkey, 2018). Similarly, in 2018, the government adopted the “Exit Strategy from the ESSN” which recognizes that Syrians under Temporary Protected Status are more settled in Turkey, and called for reforms to allow refugees to be less dependent on social assistance “by supporting their adaptation to the labour market” in Turkey.<sup>23</sup>

An important development in improving refugees’ access to livelihoods had already been put into place when the Turkish government passed a regulation on January 15, 2016, allowing Syrians under temporary protection to access work in the formal economy, conditional on employer sponsorship. Even though close to 3.7 million Syrians are currently under temporary protection in Turkey, only 63,789 Syrians (see Table 2) had been issued work permits by 2019 (the most recent year for which publicly accessible data are available). Furthermore, how many of the close to 95,000 Syrians who hold residency status in Turkey are included in the data remains unclear.

**Table 2** Total Work Permits Issued to Syrian Arab Republic Citizens between 2016-2019 in Turkey<sup>24</sup>

Year	2016	2017	2018	2019
Number of Work Permits	13.290	20.966	34.573	63.789

**Source:** Çalışma ve Sosyal Güvenlik Bakanlığı (The Ministry of Labor and Social Security) (2020) Yabancıların Çalışma İzinleri-2019 / Work Permits of Foreigners-2019 (<https://www.csgeb.gov.tr/istatistikler/calisma-hayati-istatistikleri/resmi-istatistik-programi/yabancilarin-calisma-izinleri/>) (Accessed: 22.05.2021)

Unfortunately, none of the government institutions release data on the number of Syrians in the labor market, including those who are informally employed. The Syrians Barometer report estimates that 1.4 million Syrians were employed in 2019, nearly 95 percent of them in the informal sector. Only half of those employed held regular jobs within the informal economy, the rest are working in daily work, or in jobs with daily wages rather than a monthly salary (Erdoğan, M., 2020). Another estimate provided by the ILO indicates that the number of employed Syrians was 813,000 in 2017, and more than 90 percent of them were informally employed (Caro, 2020). This is a prime example of how lack of data makes it difficult to

<sup>23</sup> “Exit Strategy From The ESSN Program,” also emphasizes importance of employment “to increase the social cohesion of the SuTP,” p. 4 and p. 13.

<sup>24</sup> Work Permit numbers include Syrians residing in Turkey with a residence permit. There is no information on how many of the work permits are given to Syrians under Temporary Protection. Part of the Work Permit is the extension of the same person’s yearly renewed permits. So even though the total number is 140,000, the actual number of people is probably less.

describe and track the situation of the refugees. Alternative sources of data cannot replace comprehensive official statistics on refugees, but can merely provide complementary information.

Together with the official statistics on work permits, these data demonstrate that Syrians in Turkey are predominantly informally employed. This is not surprising given that on average they are younger, have lower levels of education, and fewer years of experience in the labor market in comparison with the host population. Furthermore, many of them lack basic Turkish language skills, which constitutes an important labor market impediment in terms of accessing information and in finding employment, particularly in the service sector (International Youth Foundation, 2018). The pandemic, as discussed below, has further increased the incidence of informal employment among both Turkish and Syrian workers, alike.

The ILO estimates indicate that Syrians usually work more than 45 hours per week (75 percent) and on average they earn 1,302 TL (1,337 TL for men and 1,083 TL for women), 7 percent below the minimum wage. However, given its data source, the ILO estimates are likely to be biased toward including refugees with better labor market outcomes (Caro, 2020). According to UNDP, the refugees who worked in irregular jobs earned on average 1,000 TL (about US\$180) in 2019 (UNDP, 2019). According to the ILO estimates, almost half of the Syrians work in the manufacturing sector, 17.7 percent in trade and hospitality, 13.2 percent in construction and 7.8 percent in agriculture (Caro, 2020).

In short, Syrians are more likely to be informally employed, they earn lower wages, and their working conditions are more harsh. Whether this is due to lower productivity levels, or other structural barriers to finding a formal job remains unclear due to lack of better data.

Unsurprisingly, Syrian refugees have been profoundly impacted by the pandemic. According to the 2020 Syrians Barometer, the employment rate is estimated to have fallen to 29.4 percent from 37 percent in 2019, and the unemployment rate increased to 34.1 percent.<sup>25</sup>

According to a survey conducted in April 2020 by ASAM, which discusses the early effects of the pandemic containment measures on refugee households, the pandemic significantly severed access to jobs. Non-employed respondents, who constituted 18 percent of the

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<sup>25</sup> Unemployment rate = Unemployed / Labor Force; Employment Rate = Employed / Working Age Population. These data are taken from Syrians Barometer-2020, which is to be published in July 2021.

surveyed refugee population in the pre-COVID period, soared to 89 percent in March 2020.<sup>26</sup> The refugees reported that access to food (63 percent) and hygiene items (53 percent) was restricted and they had difficulty in paying for rent and other basic services.<sup>27</sup>

A similar study led by TRC/IFRC was informed by a rapid analysis survey among the Emergency Social Safety Net (ESSN) beneficiaries in April 2020 (IFRC, 2020). About 69 percent of the interviewed beneficiaries reported that they lost employment due to pandemic. At the time of the interviews, 82 percent of the households did not have any members engaged in income-generating activities. Furthermore, the pandemic increased the expenditures for 78 percent of the households and, in return, the debt load of 82 percent of the households increased. Food has been reported as the most priority need by 95 percent of the households. Taken together, these figures show the very substantial negative effects of the pandemic on the most vulnerable group of refugees: the ESSN beneficiaries (IFRC, 2020).<sup>28</sup>

Over 1.65 million Syrians in Turkey benefit from the ESSN program. The ESSN cash transfers continued during the pandemic without disruption. Yet, their value eroded with increasing inflation. For this reason, the payments of 120 TL per person per month were increased to 155 TL in April 2021. But since the Turkish currency has lost a lot of value, the support, which was valued at 35 € in 2017, decreased to 14 € in 2021. Moreover, the refugees did not qualify for the 1000 TL cash assistance that the Turkish government provided to Turkish families affected by the pandemic. According to a survey conducted by TEPAV in May 2020, only 5 percent of the Syrian participants confirmed benefiting from an in-kind transfer, mainly support for food parcels (Akyıldız, 2020). The short-term work allowance or firing ban also covers formally employed Turkish citizens and therefore disproportionately increases the risk of losing jobs for refugees. In TEPAV's sample, Syrians are more likely to lose their jobs or be put on unpaid leave than the host community because of the pandemic, 36.5 percent versus 11.5 percent, respectively (Akyıldız, 2020).

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<sup>26</sup> The non-employed category consists of the unemployed and the individuals who are out of the labor force (not working and not looking for a job).

<sup>27</sup> The education of refugees was also disrupted. The school enrollment rate among the refugee children in ASAM's sample was 70 percent before the pandemic, and only 52 percent of those reported that they could participate in distant learning. The main reason for children to miss online classes was lack of necessary equipment (55 percent). Some 85 percent of the respondents, however, said that they could access health services when in need.

<sup>28</sup> Note that the latter two reports are based on data collected in April 2020, at the very beginning of the pandemic when the economic effects of the social distancing measures were most severely felt in Turkey.

Two important outcomes emerge from the impact of the pandemic on the Turkish economy that are of direct relevance to the Syrian refugee population. Firstly, poverty rates are climbing and are likely to continue to do so, unraveling significant gains made over the last two decades. Recent estimates indicate that the poverty headcount rate has increased from 8.5 percent in 2018 to 10.2 percent in 2019 and 12.2 percent in 2020 (World Bank, 2021). Secondly, the future of the labor market looks bleak. The unemployment rate will increase as participation of the general labor force recovers. Increasing unemployment or decreasing employment will put further pressure on wages. To make matters worse, the real wages will continue to erode in face of high inflation, which is not expected to come down any time soon. The inflation rates have surpassed 15 percent by 2021, three times the official target of 5 percent (World Bank, 2021). As a result, a slow growth path ahead will aggravate the persistent structural problems of the Turkish labor market.

### **Structural Problems of the Labor Market in Turkey**

The labor market in Turkey exhibits several structural problems that hinder formal job creation even when the growth performance of the economy is relatively strong: (a) The labor force is growing at a relatively fast pace (even though the Syrians are not included in the data), (b) the informal employment is widespread (c) the minimum wage is close to the median wage (d) the firms complain that the workers lack the skills that they require, and the low-skilled workers work long hours that limit the opportunities for skill development (e) the regional differences in unemployment rates persist (Uysal et al., 2020).

In Turkey, formal employment indicates that workers are registered at the Social Security Institution, associated taxes are being paid, minimum wage together with standard working hours and conditions are respected and workers have a right to severance pay and unemployment insurance payments. However, the Turkish labor market has a dual structure: in 2019, about two-thirds of all workers were formally employed and were covered by the Labor Law while one-third workers were informally employed. Informality is especially widespread among the self-employed and unpaid family workers, while the share of informal workers among wage earners stands at 18 percent – a sizeable share of the work force.<sup>29</sup>

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<sup>29</sup> The informal employment is defined as a labor contract that is not registered at the Social Security Institution, and therefore is completely off the record. It may be that the firms are formally registered, and that even some of their employees are registered and thus formal workers, while others are not. In other words, a firm that employs workers informally may have workers that are formally employed, and is not necessarily operating informally.

The decision to register at the Social Security Institution is a household decision for the self-employed and the unpaid family workers and does not imply abuse. Given that there is State-provided universal health care in Turkey, the decision to register boils down to the retirement decision.

Informality in Turkey declined substantially following the Great Recession of 2008-2009; however, the decrease slowed down considerably from 2013 onwards (Uysal et al., 2020).

The immediate advantages of formal jobs are, arguably, being able to earn a minimum wage and working shorter hours. The minimum wage in Turkey is currently 2800 TL (US\$340).<sup>30</sup> The share of workers earning the minimum wage is estimated to be 18.3 percent (3.3 million workers).<sup>31</sup> The minimum wage is considerably higher when compared to the average or the median wages in Turkey. The ratio of the minimum wage to the median one was 86 percent in 2019.<sup>32</sup> This indicates that 41 percent of the workers, for example, 7.4 million workers in Turkey, earn at most the minimum wage.<sup>33</sup> In some NUTS2 regions (NUTS is short for Nomenclature of Territorial Units for Statistics employed by the EU to designate regions), the median wage corresponds to the minimum wage, i.e., TR62, TR63, TR71, TRA2, TRC1, TRC2.<sup>34</sup> In TRC3, the minimum wage is actually higher than the median wage (2020 TL versus 2000 TL). To reiterate, any policy based on the minimum wages would have wide-ranging effects in the labor market, both because of the sheer number of workers earning the minimum wage and because of the lighthouse effects the minimum wage creates on the wages of informal workers (Pelek, 2018).

Recent research on the effects of increasing the minimum wage on the labor market in Turkey demonstrates that when the minimum wage increases, employment shifts from the formal jobs to the informal jobs. Furthermore, when the minimum wage increases, smaller firms with lower productivity are more likely to exit the market (Acar and Bossavie, 2019). These findings indicate that informality is widespread partially due to the low productivity levels of these jobs. The OECD has recommended that the real minimum wage be kept below average productivity gains to reduce the employment costs, particularly of the lower skilled and/or young workers (OECD, 2021). Such a policy will undoubtedly help firms switch from informal to formal employment, thereby widening the tax base.

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<sup>30</sup> The monthly net minimum wage for an unmarried worker with no children is 2825 TL, the monthly gross minimum wage is 3578 TL, and the monthly cost to the employer is 4202 TL.

<sup>31</sup> This is an estimate calculated using Household Labor Force Survey 2019 data. There are reports of underreporting, meaning more workers may be registered to earn minimum wages to evade taxes.

<sup>32</sup> Author's calculations, minwage.xls

<sup>33</sup> The Kaitz index was calculated using the Household Labor Force Statistics. Some international reports on this ratio use firm-level data in Turkey, which excludes informal employment, and thus contain biased statistics.

<sup>34</sup> TR62 (Adana, Mersin), TR63 (Hatay, Kahramanmaraş, Osmaniye), TR71 (Kırıkkale, Aksaray, Niğde, Nevşehir, Kırşehir), TRA2 (Ağrı, Kars, Iğdır, Ardahan), TRC1 (Gaziantep, Adıyaman, Kilis), TRC2 (Şanlıurfa, Diyarbakır), TRC3 (Mardin, Batman, Şırnak, Siirt).

Furthermore, one reason for such high informality rates may be taxes on labor. The OECD reports that the average tax on labor, as a percent of labor costs in Turkey, is 39 percent, while the OECD average is 35 percent (OECD, 2020). Even though Turkey does not seem to be an outlier in this regard, its labor taxes are greater than the OECD average. Therefore, the social security contributions may be decreased, again to lower the employment costs of workers with lower skill sets.

### **Syrian Refugees in the Turkish Economy**

The presence of a Syrian refugee population corresponding almost to 5 percent of the country's population has significantly impacted the local economy and labor market. A widely debated topic has been whether the influx of refugees has caused the labor market conditions of the members of the host community to deteriorate. In Turkey, the evidence seems mixed: that the refugee influx generated a decrease in informal employment of men in host communities while increasing their formal employment (Ceritoglu et al., 2017). This has led to occupational upgrading or transitioning to jobs that pay higher wages and require more skills as more host community members transitioned to formal jobs with higher wages (Del Carpio and Wagner, 2015). The manual task content and the abstract task content increased in the jobs host community members hold.<sup>35</sup>

However, according to other recent data, men's total employment levels did not change (Aksu et al., 2018). Furthermore, men's and (full-time employed) women's wages increased in the formal sector. On the other hand, total employment for women fell as women with part-time employment left the labor force. Wages of the low-skilled workers of the host community in informal jobs decreased. The employment of natives in the manufacturing and service sectors increased as opposed to more labor-intensive construction and agricultural sectors, where employment of host community decreased (Aksu et al., 2018).

To sum up, Syrian refugees, who are on average younger and less-educated than the host community, decreased production costs as they replaced the low-skilled native labor. This decline in the costs of production resulted in a higher demand for the labor of skilled host community members.

Firm-level administrative data confirm that the Syrian influx has increased sales in the manufacturing and construction sectors, lowered labor costs, particularly in the service and

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<sup>35</sup> Manual tasks are activities or sequences of activities where the worker uses their physical body, and abstract tasks refer to cognitive and interpersonal tasks. Akgündüz, Y. E., & Torun, H. (2018). Two and one-half million Syrian refugees, skill mix and capital intensity (No. 186). GLO Discussion Paper.

construction sectors, especially for relatively larger firms. There is also evidence that new firms with foreign ownership entered the market, thereby decreasing market concentration. However, the positive impact is mainly concentrated in the informal economy (Akgündüz et al., 2020) (Altındağ et al., 2020). Furthermore, the exporters' product variety has increased, the prices of export products fell, and the export volume to MENA countries increased. More specifically, a 10-percent increase in the refugee-to-host-community ratio increases export variety by 9.5 percent and the probability of exporting by 3 percentage points.

Given their prior knowledge of the markets and language advantage, the exports to Syria and the MENA region are more common among the Syrian-owned firms. Almost 10,000 firms with Syrian ownership have been established since 2011, with an average number of 7 employees (TEPAV, 2018). A survey conducted by TEPAV with 300 Syrian establishments reveals that 51 percent of the firms surveyed are in manufacturing and 42 percent of the firms surveyed are exporters (UNDP, 2019). Moreover, even though there is a 10-percent quota on formal Syrian employment, the firms with Syrian ownership report that 67 percent of the workers are Syrian.

The presence of refugees also impacted some of Turkey's macroeconomic parameters. The lower labor costs translate into lower prices for the finished products. Consumer prices decrease by 2.5 percent, on average, in the refugee-hosting regions, indicating that lower labor costs are reflected in the prices, particularly for the products of the informal labor-intensive sectors (Balkan and Tumen, 2016). On the other hand, an economically small but statistically significant increase in the food prices in the refugee hosting regions was also recorded (Akgündüz et al., 2015).<sup>36</sup>

Not surprisingly, refugees had a significant effect on housing prices, especially increasing the prices of higher quality units. As the Syrians started moving into lower quality units, the host community moved toward higher quality units. The demand for the former did not change significantly, but there was a surge in the latter (Balkan et al., 2018). Naturally, rented property increased, too.

Overall, Syrian refugees have been impacted by the poor performance of the Turkish economy and its persistent structural problems in several ways and, as discussed earlier, this has played a profound role in the limited access of Syrian households to regular income. Informal employment has been particularly problematic, and it would be easy to conjecture that clamping down on informal employment is bound to restrict Syrians' access to gainful employment and that of existing firms to cheaper labor. This dilemma, which may have

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<sup>36</sup> Per Akgündüz, a 1-percent increase in the population results in a 0.2-percentage point increase in food costs.

resulted in looser monitoring by Turkish authorities, is likely to persist. One consequence is the persistent emergence of child labor as a coping strategy among refugees; for example, 17 percent of Syrian boys, aged 12-14, and 45 percent Syrian boys, aged 15-17, work (Dayioğlu-Tayfur et al., 2021). The rate of paid work was much lower among the host community: in 2019, 4.4 percent (6 percent of the boys and 2.6 percent of the girls) under 18, worked in the native population, according to TurkStat (Turkish Statistical Institute, 2019) (Turkish Statistical Institute, 2021). As these households suffer from the increasing unemployment and lower real-wage income, child labor, particularly in the agriculture sector, is likely to continue to persist and possibly become even more widespread (UNHCR Turkey 3RP Consolidated Appeal, 2020).

## Public Opinion

An additional challenge to improving the prospects of inclusion of the refugees to the economy is the growing societal resentment toward them. In the initial years of their arrival, Turkish society received them with open arms. The narrative of Turkish President Erdoğan, known as “*Ensar-ı Muhacir*,” drew parallels to the era when the Prophet Mohammad and his congregation had to flee Mecca for Medina and enjoyed the protection and hospitality from its residents, initially helped mobilize considerable popular support, especially among his large electoral base at the time.<sup>37</sup> However, the influence of this narrative weakened as years went by and the situation of refugees became protracted – with growing signs that their stay would not be temporary. In sharp contrast to 2014, when almost 58 percent of respondents had disagreed with the statement that “refugees should be sent back to their country,” a survey in July 2019 showed that more than 83 percent of respondents called for the return of all refugees and disagreed with the government’s policy of hosting them (Erdoğan, M., 2014) (T24, 2019).

This has occurred as the prospect of the refugees returning to Syria clearly remains dim over the short, medium, and even long term. The scale of destruction and ongoing instability in their home country, as well as the unlikely resolution of what has become a “frozen conflict,” speaks for itself (International Crisis Group, 2021). This reality is also reflected in the attitudes among refugees to the idea of repatriation. According to the Syrians Barometer 2019, the response among Syrians in Turkey, to the statement “I don’t plan to return to Syria under any

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<sup>37</sup> For a discussion of his narrative and link to domestic politics, see Rabia Karakaya Polat, “Religious solidarity, historical mission and moral superiority: construction of external and internal ‘others’ in AKP’s discourses on Syrian refugees in Turkey,” *Critical Discourse Studies*, Vol. 15, issue 5, (2018), and Asli Selin Okyay, “Turkey’s post-2011 approach to its Syrian border and its implications for domestic politics,” *International Affairs*, Vol. 93, No. 4, (July 2017).

circumstance” has increased from just under 17 percent in 2017 to 52 percent in 2019<sup>38</sup>, while those who supported the statement “I would return if the war in Syria ends and if an administration we want is formed” dropped by half, from nearly 60 to 30.3 percent during the same period (Erdoğan, M., 2020). Furthermore, the same survey also shows that some 89 percent of Syrians feel that they are “completely/almost completely” and “partially” integrated in their host communities (Erdoğan, M., 2020).

Turkish public attitudes could not be more different. According to the above survey, Turkish respondents observed that in their view, Syrians had integrated to “a small extent” (18.2 percent) or “haven’t integrated at all” (46.2 percent), totalling 64.4 percent of those surveyed (Erdoğan, M., 2020). Even though the Turkish public recognizes that the likelihood of the refugees returning is low, nearly half of Turks surveyed (48.7 percent) believe that no Syrians will return and another 29.7 percent of the respondents thought, “even if some of them return, majority will remain in Turkey,” and they are resistant to Syrians' formal inclusion in the Turkish economy and society.

Similarly negative Turkish responses are found relative to the Syrians' inclusion in the labor market. A significant majority of Turks surveyed (56.8 percent) believe that refugees “Under no circumstances should they be allowed to work/given work permits,” though a significant minority, 21.4 percent, appears to be willing to accept that “They should be given work permits to work only in specific jobs”; although this figure stood at almost 30 percent in 2017 (Erdoğan, M., 2020). This reluctance to share the labor market with refugees was also reflected in a separate survey conducted in late 2017, which found that more than 71 percent of respondents believed that Syrians were taking jobs away from people in Turkey (Erdoğan, E. and Semerci, 2018). The Syrians Barometer 2019 reported this sentiment at 65 percent (Erdoğan, M., 2020). Similar attitudes can be observed for granting citizenship to refugees. Erdoğan had advanced the idea several times but had to retract it in the face of strong pushback from the opposition and even his own party. This is not surprising, considering that 87 percent of the Turkish public believe Syrians “should not be given any political rights” and 76.5 percent are against the granting of citizenship, including very strong majorities among supporters of Erdoğan’s governing coalition (Erdoğan, M., 2021).

This does not present an easy picture for developing policies to achieve better inclusion of the Syrian refugees. It also at least partially explains why the government has not been able to develop a strategic vision for the future of Syrian refugees in Turkey, and instead, its policies look more like “pragmatic muddling through” (Hoffman and Samuk, 2016). On the other hand,

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<sup>38</sup> In the SB-2020 study, which had not been published as of this writing, this rate has increased to 77,8 percent.

the growing sense that an estimated 80 percent of the current refugees will likely stay in Turkey is increasingly recognized in academic, civil, and bureaucratic circles on national, municipal, and international levels (Mahia et al., 2019).

Growing negative attitudes toward Syrian refugees indeed constitute a major challenge to adopting and implementing policies that would improve refugee inclusion and strengthen social cohesion. Somewhat paradoxically, there is also widespread recognition, especially among experts familiar with the refugee situation in Turkey, that Turkish people have also shown a “high level of social acceptance” generally (Erdoğan, M., 2020). The ten years that Syrian refugees have been present in Turkey have passed reasonably smoothly and peacefully from a sociopolitical perspective. Politicization of the issue has remained very limited and there have been no major violent incidents against refugees from members of mainstream society. This has clearly helped Syrians carve some space for themselves in every facet of life, and survey results show that they appear to feel relatively safe and more content with their lives in Turkey every passing day.

However, public opinion surveys are also reminders that this “social acceptance” is a fragile one and in recent years has been eroding with an increase in society’s anxieties about rising numbers, criminality (often imagined), growing public expenditures, disruption of public services, a sense of loss of societal identity, and growing economic challenges. Hence, “social acceptance” appears to be fast transforming itself into bare “toleration” (Erdoğan, M., 2020). In contrast, as the size of the Syrian community grows, a stronger Syrian identity in Turkey is emerging with an expanding network of solidarity (Erdoğan, M., 2020). This provides Syrians with a secure space to establish and sustain their lives within what increasingly is resembling “their own parallel society”. Hence, as the presence of Syrians in Turkey has become more and more protracted, developing effective, impactful policies that support inclusion and social cohesion has become increasingly critical. There is a growing recognition of this among both national and international stakeholders, which translates into calls for moving from a basic policy approach focused on humanitarian needs to a developmental one that emphasizes access to livelihoods for refugees as well as locals. The next section considers this and the extent to which the impacts of international efforts are falling short.

## Assessing and Identifying Gaps in International Assistance and Cooperation

Ensuring protection for Syrian and other refugees and providing public services for them has been costly and demanding on the resources of the Turkish state and society. Even if frequently criticized by the Turkish government for its inadequate level, international cooperation and burden-sharing from the international community remains an essential part of the management of the current situation. This cooperation is primarily centered on the 'Facility for Refugees in Turkey' (FRIT) and the UN-led Turkey chapter of the Syria Regional Refugee and Resilience Plan (3RP). FRIT emerged from the EU-Turkey Statement (March 2016) to ensure the coordination of mobilizing EU resources to assist Turkey in addressing the needs of refugees and host communities. FRIT is based on two tranches of funding of 3 billion euros each. These funds have been fully allocated. Projects are still being implemented and will last until 2024. Both sides are exploring possibilities of renewing FRIT, especially since the March 2021 European Council decision inviting the Commission "to present a proposal to the Council for the continuation of financing for Syrian refugees in Turkey" (European Council, 2021).

Since 2015, 3RP is a coordination and programming mechanism involving various UN agencies, such as UNHCR, UNDP, UNICEF, WHO, FAO, etc. These have worked in close partnership with the Turkish government and its public agencies, municipalities, and NGOs to implement a range of projects, mostly using FRIT funds. These projects cover activities ranging from protection, to education, health, access to livelihoods, and social cohesion, as well as support for municipal services and durable solutions. Two flagship programs that have made a difference on the ground are the Emergency Social Safety Net (ESSN) and the Conditional Cash Transfer for Education (CCTE) (European Commission ESSN, 2021) (European Commission Helping Refugee Children, 2021). ESSN provides socio-economic support in the form of cash assistance to the neediest Syrian and non-Syrian refugee households and has evolved to reach more than 1.8 million ESSN beneficiaries, who number 1,650,000 Syrians (89 percent of the ESSN total), 109,000 Iraqis, 66,000 Afghans, and 3,000 Iranians. A report prepared by the World Bank and WFP, describes it as the single largest humanitarian program in the world and grants it "good performance marks" (Facundo Cuevas et al., 2019). CCTE, on the other hand, provides cash assistance to families whose children attend classes regularly (Ring et al., 2020).

CCTE is recognized as a program that has helped to integrate Syrian children into the Turkish national education system. However, even though significant enrollment levels have been

achieved, especially at the primary and secondary levels, this is not the case for the upper-secondary education level. The presence of such large numbers of children out of schooling risks leading to a lost generation and has had, as the 3RP Monitoring Report for 2019 notes, “negative consequences for the long-term development prospects of rebuilding Syria and pose risks to sustainable social cohesion in Turkey.” COVID-19 has exacerbated this picture, with school closures and the introduction of distance learning, as well as aggravated the endemic negative coping strategies that parents resort to in the face of economic challenges.

With the recognition that refugees in Turkey are in a protracted situation and, as discussed earlier, find themselves frequently confronting informal and precarious employment, growing emphasis has been put on projects that aim to improve access to livelihoods in the formal economy. FRIT’s updated strategic concept from 2018 calls for programs “with a focus on providing sustainable socio-economic support and livelihood opportunities within Turkey.” This is paralleled in the “Exit Strategy from the ESSN” adopted by the Turkish government. That document recognizes that “the SuTP is more settled in Turkey,” and shows a willingness to “implement more development-oriented assistance programs rather than humanitarian assistance. For this reason, a graduation strategy is considered vital for enhancing the skills and competences of the SuTP and making them less dependent on the social assistance.” The strategic purpose of this “graduation” process is identified as “to increase the social cohesion of the SuTP by supporting adaptation to the labour market” in Turkey (Ministry of Family, Labour, and Social Services, 2018). This is also in line with the government’s decision in January 2016 to open the Turkish labor market to Syrian refugees and enable them to apply for work permits.

However, this policy framework has not produced a major improvement in moving Syrian refugees into the formal economy and providing them with sustainable employment. For a number of reasons, success has been limited and the number of Syrians employed formally with work permits was reported to stand at only a little over 63,000 at the end of 2019. Government agencies, such as the Ministry of Family, Labour and Social Services (MoFLSS), the Turkish Employment Agency (ISKUR), KOSGEB (Turkey’s Small and Medium-size Business Development Agency), have also collaborated with 3RP partners to draw refugees into the formal economy. This collaboration has taken two forms. There have been efforts in the form of projects aiming to increase the employability of refugees by improving their life skills and command of the Turkish language, accompanied by vocational training. This has been accompanied by a wide array of projects to encourage self-employment and the creation of small businesses.

However, this focus on the supply and small business side of the employment equation has not generated significant sustainable employment for refugees. According to the most recent 3RP Monitoring Report, somewhat more than 11,000 Syrian and host community members gained access to economic opportunities and jobs in 2019 (UNHCR Monitoring Report, 2020). Though the report highlights that “this is double the achievement of 2018,” it also recognizes that this is only “a small contribution to responding to the overall needs, considering that the estimated active Syrian population in need of livelihoods support is at least 487,000” (UNHCR Monitoring Report, 2020). Engaging the Turkish private sector to employ more Syrians in innovative ways has also been advocated as a method for closing this large gap in achieving sustainable livelihood for refugees (Revel, 2020). However, it is important to remember that “firms are not charities” and that it is unrealistic to expect them to act based on purely philanthropic motivations (Betts and Collier, 2018). They will need to be economically incentivized to employ refugees and this will need to make economic sense.

The reasons for this picture are numerous, ranging from the cumbersome and expensive nature of obtaining work permits to (as discussed earlier in the report) shrinking employment prospects in Turkey’s deteriorating economy that has been made worse by the COVID-19 pandemic. Moving forward, it will be important to develop policies focusing on the demand side of the labor equation; in other words, policies that create jobs in cooperation with the international community. One way would be to incentivize the private sector to employ refugees. As will be discussed in greater detail in the next section on recommendations, this could be achieved by enabling the private sector in Turkey to enjoy trade concessions for products involving formally employed refugee labor. This would not only be critical for creating jobs for refugees but also for locals, and it could help refugees to become productive members of the local economy with their consumption and tax contributions.

This idea that has enjoyed a degree of policy recognition but also faces challenges, both in the Turkish sector as well as in a broader context. The idea emerged against the backdrop of the European migration crisis of 2015 when close to a million Syrian and other refugees streamed into Europe. The policy idea of granting better access to the exports of countries hosting large number of refugees gained traction in the spirit of burden-sharing and pre-empting secondary migration. It received backing in various high-level conferences, such as at the London Conference on Supporting Syria and the Region, in February 2016 (Government of the United Kingdom, 2016). Here, participants recognized the utility of enabling improved access to external markets as a possible policy tool, not only to encourage host governments to open up their labor market to refugees, but also to help create jobs for local populations. In its report advocating “A Call to Action” to reform the global refugee system, the World

Refugee & Migration Council also emphasized trade concessions as a means of spurring economic growth for the benefit of both refugees and their host communities (World Refugee & Migration Council, 2019). Finally, the European Commission listed gaining access to “export markets... and providing preferential export and trading status to specific products” as a “priority action” for improving Syrian refugees’ self-reliance in Turkey.

The first and so far only manifestation of the idea took the form of the 2016 EU-Jordan Compact, in which the EU agreed to allow greater access to its market for Jordanian companies employing refugees. The idea was to offer sustainable livelihood opportunities to Syrians on the one hand, and benefit Jordan’s development by expanding its industrial production base through exports to the EU on the other. These benefits were also expected to improve social cohesion by integrating refugees into the formal economy and enhancing employment for Jordanians at the same time. The Compact has had its pros and cons but is regarded as a game-changer for demonstrating “how host countries and the international community [can] respond to protracted refugee situations” (Huang and Gough, 2019).

Even though a growing body of research shows that proper employment prospects for refugees and a welcoming environment for their entrepreneurs can contribute to economic growth in the host country, the Turkish government faces a major challenge that will need to be addressed, or at least mitigated.<sup>39</sup> As discussed in the previous section, though the Turkish public received Syrian refugees with open arms initially, the public mood has dramatically changed. The expectation that their presence in Turkey will be temporary and that the victims of the conflict in Syria will be able to return to their homes has not occurred. This reality has become complicated as the growing presence of refugees became intensely intertwined, in a complicated manner, with domestic politics, economics, and issues of identity, adversely affecting local public attitudes toward their presence in the country. Hence, openly enabling refugees to access employment will reinforce the public’s concerns about them becoming settled in Turkey and further fuel public resentment against them. Managing this resentment is going to be one of the greatest challenges facing the Turkish government and the international community.

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<sup>39</sup> For a discussion of this literature, see Dany Bahar and Meagan Dooley, “No Refugees and Migrants Left Behind,” Chapter Five, [https://www.brookings.edu/wp-content/uploads/2019/09/LNOB\\_Chapter5.pdf](https://www.brookings.edu/wp-content/uploads/2019/09/LNOB_Chapter5.pdf) and Michael Clemens, Cindy Huang, and Jimmy Graham, “The Economic and Fiscal Effects of Granting Refugees Formal Labor Market Access,” Working Paper 496, Center for Global Development, October 2018.

<https://www.cgdev.org/sites/default/files/economic-and-fiscal-effects-granting-refugees-formal-labor-market-access.pdf>

The notion of trade concession for countries hosting a large number of refugees faces another paradoxical challenge in Turkey. Turkey, together with Qatar, had brought up the idea at a ministerial meeting of the WTO in 2017, calling on members to explore ways trade and WTO could help alleviate the adverse impact of the Syrian refugee crisis. (Arroyo, 2017) The effort was unsuccessful but was subsequently repeated by Turkey during the negotiations of the GCR. On this occasion, the idea was indeed adopted, as expressed in paragraph 70 of the Compact (Interview). Since then, however, there has been reluctance on the part of the government to pursue this idea, in general or more specifically with the EU. Government officials have argued that pursuing the idea with the EU risks being seen as a sign of a weakened commitment to updating the customs union and the prospects of revitalizing the accession process.

On the EU side, there are also some who resist the idea as a thinly disguised way of circumventing the standstill over the modernization of the EU-Turkey customs union, resulting from the erosion of democracy and an increasingly confrontational Turkish foreign policy toward some member states of the EU. Lastly, there is also the challenge of ensuring that the extension of trade concessions is made compatible with WTO rules, an issue that is outside the scope of this report. However, Jordan, Lebanon, and now Turkey, as hosts to more than 90 percent of the Syrian refugees and as countries that have been adversely affected by the COVID-19 pandemic, would be well placed to lead this advocacy effort.

One way in which the challenges that now face the Turkish government might be overcome is for the international community to show continued substantial burden-sharing with Turkey in a manner that makes a difference. There are several ways this could be achieved: continued funding especially for the basic needs in Turkey, extend it into northwestern parts of Syria, and revamp resettlement significantly. The next section offers a set of recommendations, starting with how to implement job creation through trade facilitation.

## Policy Recommendations

Advocating trade facilitation as an avenue for job creation for refugees, along the lines suggested in the GCR, is based on the premise that trade liberalization through the reduction of tariffs, the expansion or even full elimination of quotas, and the resolution of regulatory obstacles, is a key driver of economic growth and employment (Frankel and Romer, 1999) (Wacziarg and Welch, 2008). One specific way to put such a policy idea into action would be for the EU to grant concessions that would enable Turkey to expand its agricultural exports to the EU. Such a concession would be in line with the Action 35 of the WRC's "Call to Action." (WRC, 2019). Agricultural products are not covered by the EU-Turkey customs union. Currently, exports of fresh fruits and vegetables, together with the agricultural portion of industrially processed agricultural goods, are excluded from the EU-Turkey customs union. Hence, they are taxed and face such regulatory restrictions as quotas. From 2014 to 2020, agricultural exports to the EU fluctuated between 4 and 5 billion euros per year. Compared to Turkey's overall exports to the EU, which amounted to roughly 50-70 billion euros per year during the same period,<sup>40</sup> the massive difference in the volume of trade in these two sectors suggests that if there were to be some liberalization of trade in agricultural goods, a potential welfare gain benefiting both refugees and locals could be realized.

Such concessions would be tied to the formal employment of Syrian refugees in a manner that meets ILO and EU labor standards. A certification and monitoring mechanism could be envisaged that would ensure compliance with implementation terms to be agreed upon by both sides. Both the agricultural sector and the industrial sector processing agricultural goods, suffer from persistent labor shortages (Food and Agriculture Organization, 2018). This is often filled by Syrians and other migrants, who reportedly constituted "approximately 20 percent of the 552,000 agricultural workers" in 2019 (UNHCR Turkey 3RP Country Chapter, 2021). The shortage, especially of seasonal agricultural workers, appears to have persisted during the pandemic, although under even more adverse and precarious conditions than usual.<sup>41</sup>

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<sup>40</sup> Calculated from "Agro-Food Trade Statistical Factsheet," European Union – Turkey, March 17, 2021, [https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-turkey\\_en.pdf](https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-turkey_en.pdf)

and "Turkey-EU - international trade in goods statistics," Eurostat, March 2021, [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Turkey-EU\\_-\\_international\\_trade\\_in\\_goods\\_statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Turkey-EU_-_international_trade_in_goods_statistics).

<sup>41</sup> See "Virus or Poverty: the Impact of the COVID-19 Outbreak on Crop Production and Seasonal Migrant Agricultural Workers and Their Children in Turkey," (Ankara: Development Workshop, 2020), <http://www.ka.org.tr/dosyalar/file/virus%20or%20poverty.pdf>. For a discussion of precarious employment

Another policy idea in support of trade facilitation could be to explore the establishment of a Qualifying Industrial Zone (QIZ) near the Syrian border, where nearly a million and a half registered Syrian refugees live. The region (the provinces of Hatay, Gaziantep, Kilis, and Sanliurfa) is known for its diverse industrial and agricultural production. Kilis, only a few miles from the Syrian border, would be an ideal location. Such a zone could also have the added long-term advantage of spurring economic development and reconstruction across the border in Syria after the end of the conflict. Previous examples of such zones include the US-backed QIZs put into place in 1996 in Jordan and Egypt to generate employment and support for the Arab-Israeli peace process (CRS, 2013).<sup>42</sup> Furthermore, such a QIZ could also attract foreign direct investment interested in benefiting from concessional access to EU markets. In the spirit of burden-sharing underlined in the GCR, developed countries beyond the EU, such as Australia, Canada, Japan, and South Korea, could also be invited to support this QIZ, especially if the product range is expanded. However, when designing such a QIZ it will be important to draw lessons from the Jordanian experience, where problems of transportation, lack of childcare, etc., meant that few Syrians got jobs in them.

Ultimately, cooperation between the EU and Turkey to improve refugees' self-reliance by enabling them to access decent, formal work in the agricultural sector is in the interest of all parties. For Turkey, implementing these policy recommendations would help refugees stand on their own feet, become productive members of Turkish society, diffuse public resentment, and reduce the likelihood of crime, while at the same time helping the economy grow. For the EU, this plan would reduce the likelihood of secondary movements of refugees and, in the long run, the need to keep raising funds for humanitarian assistance as refugees become more independent. Furthermore, and in the light of the persistent structural problem of informality in the Turkish economy, these two policies could help graduate at least some, even if a modest number, Syrian refugees to the formal economy. These would also be policies compatible with Action 35 advocated by the World Refugee & Migration Council, which would be well placed to actively engage in advocating for these policies.

Arriving at sustainable, decent employment for refugees and their host communities will be a slow and fragmented process, necessitating continued social assistance. As one Turkish official deeply familiar with ESSN noted, "it is difficult to push beneficiaries out of a socio-

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conditions among Syrian agricultural workers in general, see Sinem Kavak, "Syrian refugees in seasonal agricultural work: a case of adverse incorporation in Turkey," *New Perspectives on Turkey*, No. 54 (2016).

<sup>42</sup> For a discussion of QIZs for supporting refugees, see "Encouraging the Employment of Refugees Through Trade Preferences," Policy Brief, No. 35, Migration Policy Center (EUI,) December 2017, [https://cadmus.eui.eu/bitstream/handle/1814/49584/PB\\_2017\\_35\\_MPC.pdf?sequence=1&isAllowed=y](https://cadmus.eui.eu/bitstream/handle/1814/49584/PB_2017_35_MPC.pdf?sequence=1&isAllowed=y)

economic support system and into employment just so that the financial burden on the EU is reduced” (Interview). Hence, it is likely that programs such as ESSN and CCTE will need to continue. The decision of the European Parliament to authorize an additional almost half a billion euros to continue to finance ESSN is a step in the right direction (European Commission Turkey Humanitarian Programmes, 2020). This will need to be accompanied by concerted humanitarian support for northwestern part of Syria’s Idlib region, bordering Turkey. There are 2.7 million displaced people living in this region and, according to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), 1.6 million of them are leading precarious lives in 1,374 active IDP sites (OCHA, 2021). It was the prospect of a mass influx of refugees into Turkey after the regime mounted an offensive into the region in late 2019 that led the Turkish president to put into effect his long-standing threat to send refugees to Europe, triggering a major humanitarian crisis on the Turkish-Greek border in March 2020 (Jovanovski, 2020).

For the time being, a precarious equilibrium in the region appears to hold but is highly dependent on whether the Syrian regime and its allies decide to mount future military offensives to capture the area from the opposition (Gall, 2021). Enabling the flow of adequate humanitarian assistance into this fragile area will be critical to mitigating the risk of mass displacement into Turkey. Exploring the possibility of making EU funds available for such humanitarian assistance in cooperation with Turkey would help ease the dire conditions there but also strengthen the sense of protection against a potential military attack from regime forces that, in the words of a local council official, “would double the refugees in Europe” if it were to occur.<sup>43</sup> Furthermore, incorporating funds for such assistance would not only be in line with the oft-overlooked Article 9 of the EU-Turkey statement that promised “to improve humanitarian conditions inside Syria” in cooperation with Turkey, but also help to meet the shortfall in funding for the Syria Humanitarian Response Plan (HRP) that OCHA depends on for its humanitarian mission (van Heukelingen, 2021). The modalities would have to be arrived at in a manner ensuring that “the EU could (to a certain extent) avoid legitimizing” Turkish presence there (van Heukelingen, 2021). The UNSC’s adoption of Resolution 2585 of July 2021, permitting cross-border aid into northern Syria, provides the possibility of continuing humanitarian assistance under UN auspices until the end of the year (United Nations, 2021).

The final area of cooperation to help the Turkish government address the challenge it is facing from public opinion would be to show that it has the ability to resettle refugees in numbers that would make a difference. Resettlement is not covered by FRIT’s “migration

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<sup>43</sup> Quoted in “In Turkey’s Safe Zone in Syria, Security and Misery Go Hand in Hand”.  
<https://www.nytimes.com/2021/02/16/world/middleeast/syria-turkey-erdogan-afirin.html>.

management” priority but is an integral part of the EU-Turkey Statement of March 2016. The Statement had referred to the prospect of resettling 72,000 refugees from Turkey, but as of March 2020, only 27,000 had been: “a figure comparable to the number of Syrian refugees that nearly any given district in Istanbul hosts” (Rivas and Adam, 2020). Resettlement as a durable solution is considered one of the important tools of responsibility-sharing mentioned in the GCR and as a way of relieving some of the burden on host countries – especially with respect to vulnerable cases. Recent years has seen a significant decline in the number of resettlement quotas, leaving the UNHCR unable to meet its traditional objective of finding resettlement spots for at least 1 percent of the world’s refugee population. In 2019, despite higher submission only less than 5 per cent of the global resettlement needs were met (UNHCR Resettlement Needs, 2020). For Turkey, the UNHCR has projected that there will be 423,600 places of resettlement needed for Turkey in 2021 (UNHCR Resettlement Needs, 2020). As of the end of November 2020 the UNHCR reported there had been only 3,867 departures from Turkey, out of 6,000 submissions (UNHCR Turkey Operational Update, 2020). This is even lower than the 10,286 resettlement departures of the previous November (2019) (UNHCR Turkey Operational Update, 2019).

The COVID-19 pandemic adversely affected resettlement that globally was already at a low level. Whenever travel begins to recover from the COVID-19 pandemic, resettlement needs to be revived. The EU’s recent New Pact on Migration and Asylum advocates “providing protection to those in need through resettlement” and includes support for resettlements in migration management partnerships with third countries (European Parliament, 2020). The EU could also explore avenues to coordinate with the United States on resettlement programs. The new US president, Joe Biden, has vacillated in his promise to boost the resettlement quota to 125,000 from the historically low 15,000, set by the Trump administration (Lithwick, 2020) (Sullivan et al., 2021). Yet, he did also announce that increasing resettlement quotas in support of refugee protection to be “central to a values-based foreign policy that demonstrates American moral leadership on the world stage” (The White House, 2021).

The EU and the US ought to explore the possibility of coordinating their resettlement programs to impact burden sharing with developing countries that are, after all, hosting most of the refugees of the world. They could explore prospects for developing a “comprehensive plan of action” similar to the one in 1989 that resolved the protracted state of the “boat people” who had fled Vietnam after the end of the war (Casella, 2016). Such a plan would focus on the resettlement of refugees from Syria’s neighboring countries and, as difficult as it might seem, could be tied to a deal calling for some local integration (Chatty, 2020). This

should also be extended to Afghans, especially in the case of Turkey. Afghans constitute the second-largest refugee population in Turkey and their ultimate “destination remains unknown,” as their prospects of finding a durable solution is dim (Sahin et al., 2021). The destination problem is particularly acute for the many undocumented Afghans leading hidden lives in Turkey’s big cities, struggling to earn enough to support themselves and their families living under the constant threat of deportations (Reidy, 2018). Additionally, the US decision to withdraw from Afghanistan risks the Taliban returning to power and undermining the many gains that were made with respect of democratic governance, women’s rights, etc., and precipitating a mass displacement of people (Kirişci and Memisoglu, 2021). There are already reports that 1000 Afghans are entering Turkey daily (T24, 2021). Such sustained displacement is highly likely to bring more Afghans to Turkey – further aggravating the current situation for Afghans.

In the interim, a more modest arrangement, like the Voluntary Humanitarian Admissions Scheme that had been envisaged in the EU-Turkey statement, could be reached between the EU and Turkey to provide the pool of Afghan refugees in Turkey with safe and legal alternatives to irregular migration. This could also help overcome disillusionment on the Turkish side, resulting from the EU’s failure to activate the Scheme for Syrian refugees (Rivas and Adam, 2020).

There are also several policies that the Turkish government could consider implementing to enhance the impact of the above ones. In contrast to a widely held view among stakeholders, including government agencies, of the need to enable refugees access to formal employment, its realization by Turkey has lagged behind that of other Syrian-hosting countries in the region. The number of work permits issued to the refugees in Jordan amounted to 70,000 in 2017, as against 20,966 in Turkey (UNHCR Evaluation Synthesis, 2017) (Republic of Turkey Ministry of Family, Labour, and Social Services, 2017). Turkey’s total is comparatively small, given that Jordan hosted 654,903 Syrian refugees in 2017 as against 3,426,786 in Turkey. As highlighted earlier in this report, the number of formal jobs that internationally funded projects have enabled refugees to hold remains a fraction of the needed 187,000 formal jobs for the most-vulnerable beneficiaries of the ESSN program, as estimated by the “Exit Strategy” (UNHCR 3RP Outcome Monitoring Report, 2019). Sadly, Turkey’s macroeconomic environment coming out of the COVID-19 pandemic suggests that the labor market for Syrians will deteriorate as the unemployment rates among the Turkish citizens increase.

It would help if current regulations in Turkey could be relaxed, particularly those that govern the mobility of refugees inside the country and the requirements that need to be met to access work permits, such as the six-month residency requirement for a Syrian worker to be

able to apply for a work permit, and the 10 percent quota on Syrian workers in any particular establishment.<sup>44</sup> A growing body of research shows that proper employment prospects for refugees and a welcoming environment for their entrepreneurs contribute to economic growth in the host country.<sup>45</sup> Such restrictions have driven thousands of companies into informal employment, resulting in a loss of tax income for the government and generating resentment from formal businesses. It is important to bear in mind that providing an “enabling business environment” would benefit all (Karasapan, 2016).

Furthermore, the government never adopted a formal settlement policy regarding Syrians. Although there is a rule that Syrians cannot leave the city in which they were registered, their mobility is difficult to stop. Besides the very large numbers and the difficulty of control, ongoing experience has shown that policy of travel restrictions has been difficult to implement and that it has lost its necessity. The regulations concerning travel restrictions for Syrians certainly need to be revised. Resolving the mobility problem would benefit Syrian workers by enhancing their ability to find jobs that suit them and it would serve the needs of employers, too. This would particularly benefit seasonal agricultural workers, who, by the very nature of their work, need to be mobile. Nevertheless, full mobility presents political and security concerns because it could lead to cities becoming difficult to manage politically or facilitate potential acts of terrorism or secondary movements to Europe (Memişoğlu, 2018).

However, relaxing these restrictions is not going to be sufficient to facilitate access to sustainable formal employment. The UNDP recognizes this and instead suggests the importance of adopting a more integrated approach by combating informal employment economy-wide, creating more job opportunities, but also focusing on measures to improve the working conditions in the informal sector (Jobs Make the Difference, 2017). Yet, it fails to discuss how the working conditions of the informally employed would fall under the scope of government policies. Similarly, the 3RP also recommends improving Syrian’s access to the larger labor market, tacitly admitting that formal employment is a difficult goal to achieve under the current circumstances. The 3RP emphasizes that the resilience-related efforts of

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<sup>44</sup> The fee for work permits were reduced by more than 40 percent in 2018.

<sup>45</sup> For a discussion of this literature, see Dany Nahar and Meagan Dooley, “No Refugees and Migrants Left Behind” Chapter Five, [https://www.brookings.edu/wp-content/uploads/2019/09/LNOB\\_Chapter5.pdf](https://www.brookings.edu/wp-content/uploads/2019/09/LNOB_Chapter5.pdf), and Michael Clemens, Cindy Huang, and Jimmy Graham, “The Economic and Fiscal Effects of Granting Refugees Formal Labor Market Access,” Working Paper 496, Center for Global Development, October 2018

<https://www.cgdev.org/sites/default/files/economic-and-fiscal-effects-granting-refugees-formal-labor-market-access.pdf>

Turkey are underfunded and further stresses the need for investing more on “transition to formal employment” for Syrians (UNHCR Turkey 3RP Country Chapter, 2021).

Creating formal employment opportunities for Syrians proves challenging, partially because Turkish citizens are having difficulties securing these jobs, as well. To reiterate, informality is a persistent structural challenge of the Turkish economy and is closely linked to the disappointing reality that Turkey’s minimum wage is relatively close to the median wage. This indicates that any policy targeting the minimum wage is going to have a large effect on the labor market in Turkey. Furthermore, it will create perverse incentives to under-report wages to take advantage of subsidies.

Clamping down on informal employment may not yield the desired outcomes either, as firms that create informal employment are mainly smaller firms with lower productivity levels (Acar et al., 2019). Under stricter enforcement, these smaller firms with lower productivity levels would be forced out of business, and the employment that they generate, lost. Given their skill levels, their workers may not be able to find employment at all. Clearly, Syrians would be more likely to suffer from this policy, given that they are more likely to be informally employed.

In sum, the relative level of the minimum wage is very important in the transition from informal to formal employment. One policy that the Turkish government could adopt would be to lower taxes on labor or subsidize taxes on all wage levels for a limited amount of time.<sup>46</sup> Given the current state of the Turkish economy, international funds might be used to support this policy option. The actions 25, 26 and 27 in the WRC’s “Call to Action” emphasize that the international agencies, donor countries and development banks should increase funding for refugees (World Refugee & Migration Council, 2019). Such funding could be channeled to across-the-board labor tax subsidies. Another policy would be to allow the government-regulated minimum wage to erode in face of inflation – a policy, however, politically difficult to implement and sustain.

## **Additional Recommendations**

### ▶ Local Integration

Local integration, in the form of granting citizenship, is one of the preferred, durable solutions for refugees. However, it is a politically sensitive topic. Turkish citizenship can be acquired by marriage and also, for the holder of a valid residency permit, by residing for a minimum of five

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<sup>46</sup> Labor tax: The total tax rate payable by businesses provides a comprehensive measure of all the taxes a business bears. <https://data.worldbank.org/indicator/IC.TAX.LABR.CP.ZS>

uninterrupted years, or making an investment in Turkey that exceeds certain limits. The government also enjoys the power to grant “exceptional citizenship.” The Temporary Protection Regulation does not allow Syrians a path to citizenship. However, the Government of Turkey has issued “exceptional citizenship” to some Syrians under temporary protection, especially after 2016. However, the opaque nature of this path has generated criticism and resentment among the local public. Therefore, the government should consider making the process more transparent and institute a two-step path to citizenship by permitting refugees who have been under temporary protection for a certain period to enjoy the right to apply for “residency” first and later “citizenship”.

▶ Local Administrations and Local Cohesion

Municipalities have been at the forefront of dealing with the influx of refugees from Syria and elsewhere, as they constitute the front line in managing migration and supporting the integration of forced migrants into their respective communities (Polat and Lowndes, 2020). It is especially during the COVID-19 pandemic that some of the municipalities with large refugee populations have distinguished themselves by extending their social assistance services to them, too (Sak and Kadkoy, 2020). Beyond dealing with the difficulties of the pandemic, municipalities have assisted the integration of refugees in the transition from humanitarian to developmental assistance, as appropriately recognized at the “International Forum on Local Solutions to Migration and Displacement” that adopted the Gaziantep Declaration (UNDP Municipal Forum, 2020). Their centrality is also amply recognized in the GCR, as well as by the EU in its updated strategic concept note for FRIT.

However, municipalities do have shortcomings and face many challenges. Reports from the Union of Municipalities in Turkey (2019), from the UNDP in Turkey (2018), and from the Marmara Municipalities Union (2017) document in considerable detail the challenges they face in performing their services. It is not the purpose of this report to dwell on them all, but to highlight the need for the government to amend municipal law to ensure that the provision of funds is based on “the number of residents, including refugees” instead of “the number of citizens.” Ambiguity in the law on to whom services can be extended can lead to administrative and legal challenges that undermine municipalities' ability to play their full role in managing proper refugee inclusion and social cohesion. Such an amendment would also improve the ability of municipalities to cooperate with international stakeholders and possibly receive funding for programs resembling ESSN that could be named Municipality Social Integration Assistance (*Belediye Sosyal Uyum Yardımı*- BEL-SUY). Through such a program, municipalities could be provided with a monthly funding of, for instance, €10 per refugee to design and implement projects benefitting their refugee population. This kind of program,

with dedicated external funding, would eliminate complaints from local people about the perceived use of all funds for the Syrians and also ease pressure on the politicians.

## Conclusion

Most Syrian refugees have now been in Turkey for almost a decade. As they have settled in Turkey, their attitudes toward repatriation have evolved in favor of settling in Turkey for the long term – particularly given that the current state of Syria is not improving. Recent polls demonstrate that Syrians in Turkey feel like they have integrated with the host community, yet the host community thinks otherwise.

Even though the share of Syrians in the population is relatively small, almost 3.7 million is still a significant number, especially given their concentration in certain parts of the country. This puts a lot of strain on the provision of public services and possibly on the labor markets. Furthermore, the current state of the Turkish economy is not conducive to integrating refugees into the formal economy and this is expected to deteriorate. FRIT funds are increasingly being channeled from aid for basic needs to development-oriented projects, with a focus on labor market integration for refugees. However, there is little evidence that the kind of long-term solutions detailed by the 3RP Monitoring and Evaluation Report for 2019 have been achieved. Sustaining livelihoods has become particularly challenging during the pandemic, which has intensified the already-existing structural problems of the Turkish labor market and further exacerbated the precarious situation of many refugees.

This report proposes three major routes for future policies, accompanied by several recommendations for the Turkish government to consider for improving refugee inclusion and social cohesion.

### Trade facilitation

Exploring ways to facilitate the export of Turkish agricultural products to the EU conditional on formal employment of Syrian refugees may help create sustainable formal employment opportunities in agriculture. In a similar vein, establishing a qualified industrial zone near the Syrian border with access to the EU markets may also prove useful. Contingent on utilizing Syrian labor, this policy may be relatively more difficult to implement, as it may cause resentment among the host community. To balance this aspect, extended support from the international community, e.g., an extension of the ESSN program, would strengthen the hand of the government in adopting bolder policies towards Syrian refugees.

Furthermore, the international community could engage Turkey in a bold multilateral effort to resettle a “difference-making” number of Syrians and also Afghans, particularly given that so far “burden-sharing” through resettlement has been dismally inadequate. Such a policy would

be somewhat reminiscent of the “comprehensive plan of action” for the “boat people” from Indochina. Note that, to render resettlement possible and to prevent further refugee flows, the international community should also consider direct aid to northern Syria.

### **Labor market policy**

We propose lowering Turkish taxes on labor to facilitate transition to formal jobs for all workers, host community and refugees, alike. Even though this policy does not require direct funds from the international community, lowering labor taxes may be met with resistance from the host community, as it puts further strains on the social security system. Therefore, the international community may need to help subsidize labor taxes across the board, thereby effectively lowering labor taxes. Providing tax subsidies for minimum wage employment will create reverse incentives to under-report wages to take advantage of the subsidies. Note that such a policy would be easier to implement from a social cohesion perspective.

Turkish government-focused recommendations range from policies that could help improve the mobility of refugee employees and entrepreneurs, to encourage local integration through developing a path to citizenship, given a widely recognized reality that the likelihood of refugees returning to homes in Syria after a decade-long displacement is dim.

Key to implementing the recommendations directed at the international community will be the adoption of a dynamic policy advocacy campaign, especially for trade facilitation, and a comprehensive plan of action for the resettlement of Syrian and Afghan refugees. The World Refugee & Migration Council, in light of its “Call to Action” and network, would be well-placed to initiate such an advocacy campaign – especially with a focus on trade facilitation. Such a policy for countries hosting large number of refugees, with an arrangement for sustainable, formal employment for them in return, is an idea that has been on the public agenda at least since the EU-Jordan Compact in 2016 and the adoption of the Global Compact on Refugees in 2018. So far, however, it has not entered the realm of policy debate in the leading developed countries of the West. The upcoming WTO’s 12th Ministerial Conference in Geneva in late November 2021, may be a good place to start. It was during the previous ministerial meeting, in 2017, that Turkey and Qatar had raised the idea – though without much success. Since then, not only has the number of refugees continued to increase significantly, as the annual UNHCR Global Trends reports reveal, but also so has the pressure on developing countries, together with increasing calls for more effective and innovative ways of supporting countries hosting large number of refugees. The COVID-19 pandemic has only made matters worse. The fact that 2021 is also the 70<sup>th</sup> anniversary of the adoption of the 1951 Convention Relating to the Status of Refugees might provide an additional impetus for a “Call to Action.”

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The World Refugee & Migration Council offers bold thinking on how the international community can respond to forced displacement and migration through cooperation and responsibility sharing.

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