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# TECHNICAL ASSISTANCE FOR PROMOTING DECENT FUTURE OF WORK APPROACH WITH A FOCUS ON GENDER EQUALITY

(TREESP1.3. FoW/P-01)

TURKEY





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WORK APPROACH WITH A FOCUS ON GENDER EQUALITY**

**(EuropeAid/140341/IH/SER/TR)**

**TURKEY**

**CATEGORY 4 (COORDINATION AND COOPERATION MECHANISMS)  
INTERVENTION 13: WORKSHOPS FOR NEW EMPLOYMENT STRATEGIES**

**ADANA WORKSHOP: 12 JANUARY 2022**

**DESK RESEARCH REPORT**



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## 1- INTRODUCTION

The Project is required to deliver 5 workshops in 5 provinces (Ankara, Bursa, Izmir, Adana and Istanbul) aimed at generating ideas for new employment strategies to be pursued by MoLSS. The Ankara workshop took place on 6 July 2021, and focused on youth employment as a key component of MoLSS's drive to finalise the Youth Employment Strategy. The Bursa workshop took place on 21 October 2021, where issues of sectoral importance to that province were examined, to ensure that these are taken into account in the drafting of new policies and strategies going forward.

This short Report is an socio-economic analysis of Adana, drafted to contribute to an understanding of which issues might become the focus for the workshop that will take place 12 January 2022.

## 2- ADANA: GOVERNANCE AND POPULATION

Adana province is located on the Seyhan River, in south-central Anatolia, close to Syria's border. It is divided into five municipal districts located in the city centre; Seyhan, Yüreğir, Çukurova, Sarıçam and Karaisalı; and ten smaller districts at the outskirts of the city. The Seyhan district, located to the west of the Seyhan river, is the cultural and business centre of the city. The Çukurova district is a modern residential district that lies north of the Seyhan river. The Yüreğir district, located to the east of the river, consists of low-income residential areas and large-scale industries.

The population estimated is 2.237.940 and the population density is 160.8/ km<sup>2</sup>. The annual population change for the period 2013 – 2019 is 0.68%. About the population structure, there's a 49.9% of male population and 50.1% of female population.

## 3- ECONOMIC ACTIVITY

### 3.1. GDP Contribution

The contribution to Gross Domestic Product (GDP) is 2% (Adana ranks 8<sup>th</sup> in Turkey's GDP, according to the Turkish Statistical Institute), and the GDP in million USD is 43,871. After 20 years of stagnation, the economy of Adana is picking up recently with investments in the tourism and service industry, wholesale and retail sectors and the city is re-shaping as a regional centre.

Some sectors in Adana province are experiencing significant growth, namely manufacturing and construction. Within agribusiness, which is historically Adana's flagship industry, aquaculture's contribution to Turkey's national GDP has increased since 2005; between 2005 and 2018, the share of fishing's contribution to national GDP rose from 0.4% to 0.9%. Manufacturing and housing construction, (partially due to the recent immigration of Syrian refugees), are two emerging sectors, and the two sectors with the largest capacity to formally employ Adana residents. There are nearly 12,000 manufacturing firms within Adana, of various sizes, and over 5,000 construction firms. The expansion of regional headquarters for information and communication technology (ICT) firms already present in Adana provides further employment opportunities, as does the health sector (and medical tourism), and increasing regional investment in the energy sector. Despite port access and the increasing potential for tourism, the textile industry has lost its prominence in the provincial economy.<sup>1</sup>

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<sup>1</sup> GIZ (2018) Labour Market Assessment Implemented by International Advisory, Products and Systems (i-APS) and its Turkey-based partner Infakto RW.



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### 3.2. Main Stakeholders

Between the main stakeholders of Adana, it is important to consider:

- Adana Chamber of Commerce (ATO) was founded in 1894 to guide and regulate the cotton trade and it is one of the oldest of its kind in Turkey. Today the Chamber has more than 25,000 member companies, furthers the interests of businesses and advocates on their behalf. According to their website the main projects are: Ceyhan Organised Energy Zone; Çukurova International Airport; Mersin Logistics Specialisation Organised Zone; Tarsus-Kazanlı Tourism Zone; Karboğazı Ski Center and Akkuyu Nuclear Power Plant
- Adana Commodity Exchange (ATB), founded in 1913, functions mainly to organise the trade of agricultural produce and livestock in a secure and open manner.
- Adana Chamber of Industry (ADASO).
- Çukurova Development Agency.
- Between the main companies: Temsa Global, an automotive manufacturer, has more than 2500 employees and manufactures 4000 buses annually. Marsan-Adana is the largest margarine and plant oil factory in Turkey and Advansa Sasa is Europe's largest polyester manufacturer employing 2650 employees.
- There are two state and one foundation universities in Adana: Çukurova University, Adana Science and Technology University and Kanuni University.

## 4- LABOUR MARKET<sup>2</sup>

### 4.1. General Indicators

Within TR62 (Adana, Mersin) region, the active population (aged between 15 to 64 years) is 1,427,000 .Only 46.9% of this population is included in the labour force, with 65.8% of those being men and 28,5% being women.<sup>3</sup>

It is also important to consider that particularly in Adana province, the majority of the workforce is literate (approximately 95%), which is nearly equal to the national average. Youth in Adana are significantly more educated than older generations, as over 80% of those aged 16-20 in Adana have received secondary education (with this figure being less than 40% among individuals over 40 years old).<sup>4</sup> There is no significant gender gap in terms of educational achievement among those participating in the labour force, particularly among the younger generations.

Access to the labour market is variable, and is based on the level of skills the candidates have and the strength of their personal networks. Regardless of employment status, the prevailing method for employment is through friends and personal networks.

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<sup>2</sup> In the following report we use information corresponding to the province of Adana or the TR62 Region (Adana, Mersin), according to information found in İŞKUR Reports or other sources consulted. In all cases it is made clear whether the information corresponds to a province or the region

<sup>3</sup> İŞKUR - Labour Market Research Adana Province 2021 Final Report, 2021.

<sup>4</sup> GiS, 2018



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Based on the Nomenclature of Territorial Units for Statistics (Statistical Regional Units Classification), Adana is placed in the TR62 region with Mersin, **with agriculture and service sector employment rates** of 23.7% and 53.1%, respectively. Both of these rates are above the national average, but the employment rate in the industry sector (23.3%) falls below the national.

Although the labour force participation ratio (46.9%) and unemployment rates (13.4%) are not dramatically different from the national (51.4% and 11.7%, respectively) averages, Adana's labour market is highly sensitive to economic crises, and the current economic situation has lowered rates of labour force participation and employment in the province. The high number of informal employees, usually stemming from the need for seasonal agriculture workers, presents another critical labour market issue in Adana.

Regionally, the highest rate of employment is found in micro-size enterprises that have between one and nine employees, with sales revenue of less than 1 million Euros<sup>5</sup>. However, in Adana, the agriculture sector employs an important percentage of the workforce, with 38% of lands being arable, and with the sector's contribution to regional GDP being above the national average. Adana is evaluated as being efficient in terms of development potential, regarding the profitability and productivity of investment, although this potential seems not to have been realised, with Adana being below the national average in terms of its share of high-value-added industrial production<sup>6</sup>. The repercussions of potentially low valuation and investment contribute to a lower share for industry in employment rates, as well as the migration of qualified labour.

About the **main employment trends**, labour force participation in the TR62 Region (Adana, Mersin) per gender is not dramatically different from the national average, although utilisation of the labour force (employment and unemployment rates) remains a significant challenge.

**Table 1: Employment Indicators**

	TURKEY <sup>7</sup>	Male	Fem	TR62 Region (Adana, Mersin) <sup>8</sup>	Male	Fem
Labour Force Participation Rate (%)	<b>51,4</b>	70,3	33,0	<b>46,9%</b>	65,8%	28,5%
Employment Rate (%)	<b>45,4</b>	63,0	28,2	<b>40,6%</b>	57,8%	3,9%
Unemployment Rate (%)	<b>11,7</b>	10,3	14,6	<b>13,4%</b>	12,2%	16,2%

Source: TÜİK – İŞKUR

The employment rate in the TR62 Region (Adana, Mersin) is 40,6%, a 4.8% of difference with the Turkish national level. The women employment rate is lower (a 23.9.5% in TR62Region and 28.2% in Turkey).

The rate of unemployment in Adana is 1,7% higher than the national average, with a 1.6% more for women (Female unemployment 16,2% and male unemployment 12,2%).

<sup>5</sup> KOSGEB –Small and Medium Enterprises Development Organization - Small and Medium Sized Enterprises Field Research Study: Adana Assessment Report, 2016

<sup>6</sup> The Gross Industry Value Added per capita for Turkey is 4,262 TRY, while it is 2,549 TRY for the TR62 region, according to the study: Cukurova Development Agency, Research on Potential Investment Areas for Adana. Turkish Development Bank, 2016

<sup>7</sup> TÜİK (2021) National Stats for the Quarter III – July – September 2021

<sup>8</sup> İŞKUR - Labour Market Research Adana Province 2021 Final Report, 2021.



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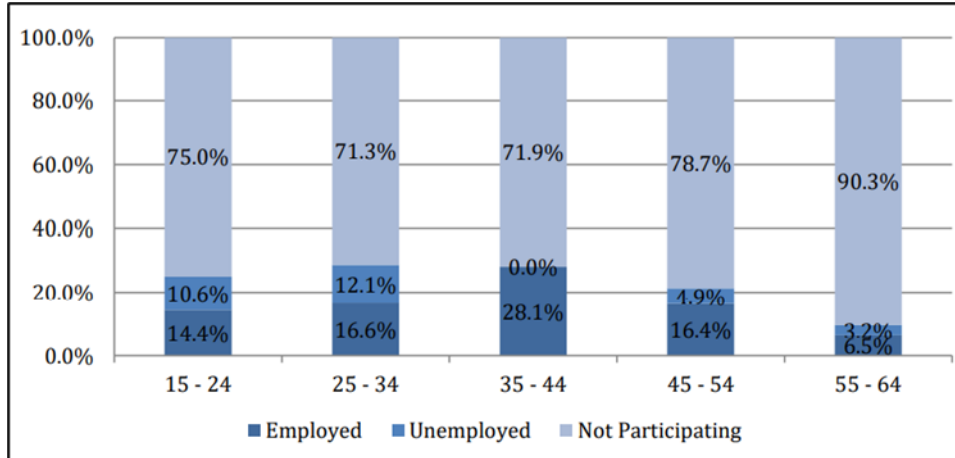
Moreover, the labour market in Adana is more vulnerable to economic crises than that of other regions. In 2010, unemployment in the city reached a record high of 19.1%. During the 2009 global economic crisis, the increase in the unemployment rate of Adana was greater than the national and regional averages. Given the population demographics, it seems likely that youth unemployment, in particular, is a serious concern, with the number of young people actively looking for job opportunities increasing as more reach employable age and complete their studies.<sup>9</sup>

Female unemployment in Adana remains high. However, although the majority of women do not formally work, they contribute to agricultural production, child care, and other household jobs. (an explanation is included before). There were 51% of women who quoted housework as the primary reason for not participating in the formal labour force, followed by education commitments and lack of family permission. Among the women counted as being part of the labour market, nearly half of them aged between 15 and 34 are unable to find a suitable job.<sup>10</sup>

#### 4.2. Women in the Labour Force

According to İŞKUR, the proportion of unemployed women looking for a job was 8.6%, and the remaining 75% did not formally participate in the labour market, (except for those who might have provided unskilled and unpaid labour for a family business). Figure 1 (from 2018) illustrates a very low level of participation of women in the labour force, that shows a tendency in women employment

**Figure 1. Participation of Women in the Labour Force - 2018**



Source: GIZ - TÜİK

According to the Figure 1, 75% of women aged 15-24 did not participate in the labour force. This figure declined to 71% for women in the 23-34 and 35-44 age cohorts, and then further increased with increasing age. The graphs show that an important percentage of women living in Adana did not work, almost regardless of age.

<sup>9</sup> Labour Market Assessment: Adana Province, 2018, op. cit.

<sup>10</sup> GIS (2018)

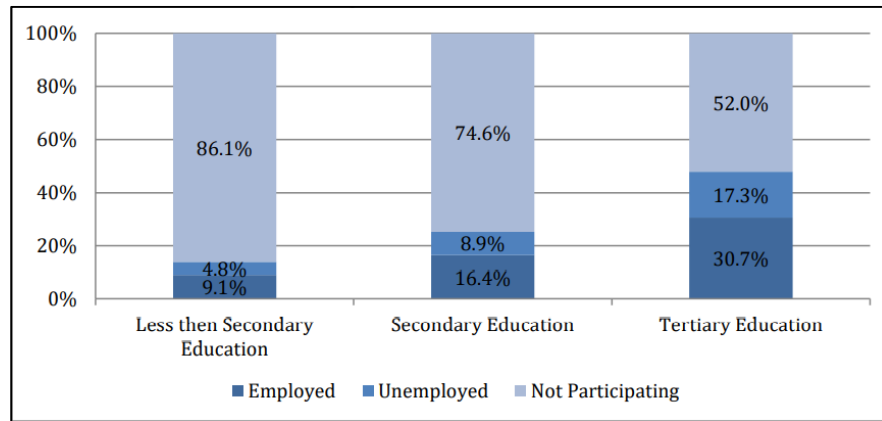




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As shown above, unemployment was a major problem for people in the younger cohorts. The proportion of women employed and unemployed was almost equal in the 15-24 and 25-34 age groups, suggesting that perhaps half of the young women had the intention to work, yet could not find a job.

**Figure 2. Participation of Women in the Labour Force, by Level of education**



Source: GIZ - TÜİK

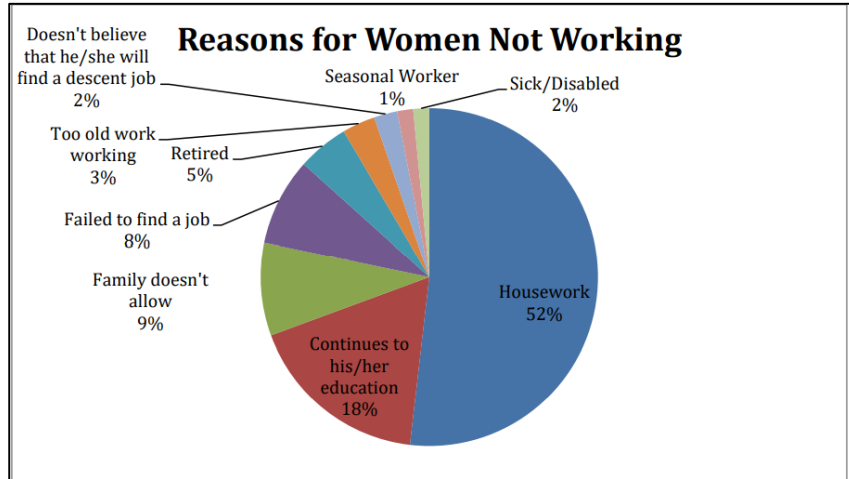
Figure 2 shows that, as level of education increased, predictably, the percentage of labour force participation increased. There were 86% of the least educated women who did not work; 9% of them were employed and 4.8% were unemployed. Among graduates of secondary education, the percentage of employed and unemployed women was greater, (being 16.4% and 8.9%, respectively), with the proportion of women not formally working decreasing. Among the university graduates, only 52% did not work, indicating a significantly higher ratio of labour force participation. Nearly one third of women having a university degree were working, while 17% of them were unemployed and seeking a job.

When we compare the results of the İŞKUR Report (2020) and the results of GIZ Report (2018) a coincidence is found on the most important reason for the exclusion of women from the labour force: house duties (50.8%). The second-most important reason was women continuing their education (17.2%). For a small percentage of women, the family's permission played an important role in their access to the labour market (8.7%). About 10% of women had failed to find a job.



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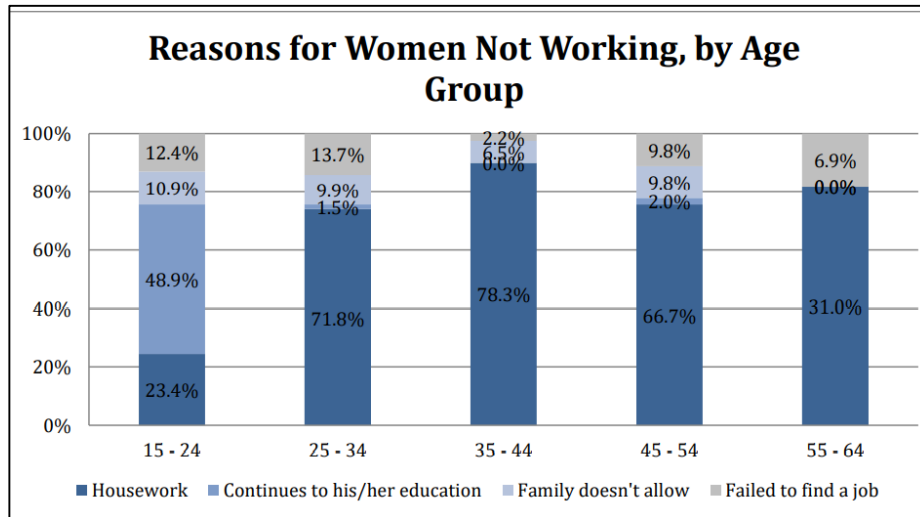
**Figure 3: Reasons for women not working**



Source: GIZ - TÜİK

According to both Reports, house duties seem to be the most important reason of the exclusion of women, especially between the ages of 25 and 54. For the youngest cohort, education was the primary reason for not working. As previously mentioned, failing to find a suitable job was a particular problem among the relatively young cohorts (12%).

**Figure 4: Reasons for women not working, by age group**



Source: GIZ - TÜİK

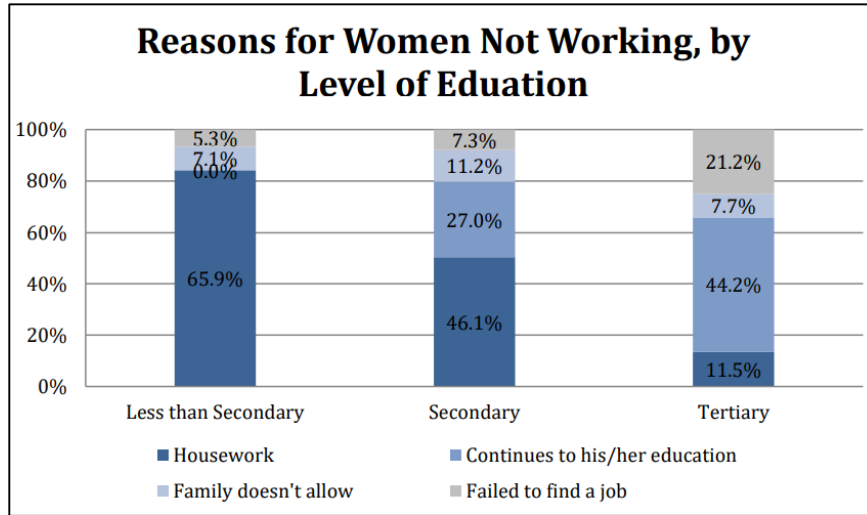
Figure 5 shows house work to be the most important factor for women being excluded from the labour market among those with the lowest level of education (65.9%), with this factor becoming less important with increasing level of education. Among the university graduates, only 11.5% mentioned this factor as being relevant; for them, continuing with education was the main barrier. It should be further emphasized



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that 21% of university-graduated women were unable to find a job, highlighting the challenge of finding employment for educated women, (and for young people in general, in Adana)

**Figure 5: Reasons for women not working, by level of education**



Source: GIZ - TÜİK

#### 4.3. Distribution of Employment by Sectors

The distribution of employment by sectors, shows the following:

**Table 2: Employment by sectors**

	Turkey <sup>11</sup>	TR62 Region (Adana, Mersin) <sup>12</sup>
Agriculture	17,1%	24%
Industry	21,4%	23%
Construction	6,2%	-
Services	55,4%	53%

Source: TÜİK (third quarter of 2021) and İŞKUR (2020)

Employment in the TR62 region (Adana, Mersin) is concentrated in the **service sector**, where more than half of the labour force is employed. This trend has not changed over time, where the share of agriculture and industry remains around 20%. Compared to Turkey, it shows a higher percentage, particularly in Agriculture.<sup>13</sup>

<sup>11</sup> Turkey data for 4 sectors is data for the third quarter of 2021.

<sup>12</sup> İŞKUR - Labour Market Research Adana Province 2020 Final Report, 2020

<sup>13</sup> In the 2020 info by NUTS 2 level, Construction was given under industry.



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#### 4.4. Companies in Adana and Registered Employment

About the size of the companies, the number of firms registered to the Social Security Institutions<sup>14</sup> in Adana was 44,727, which corresponded to a national share of 2.27%. Comparing the number of micro, small, medium and large enterprises, with the respective number of employees registered to the Social Security System, the rate of workplaces with 1 to 9 employees in the province is 88,1% and the number of workplaces with 100 or more employees in the province is only 378. From the enterprises registered, the 97% are private and only a 3% is public.

**Table 3. SSI Workplace Statistics for August 2021**

Indicator	Number/Amount
<b>Number of Firms registered</b>	44,727
Public	751
Private	43976
<b>Number of Insured</b>	325,926
Public	41.623
Private	284.303
Male	235.602
Women	90,324
<b>Average Monthly Earnings</b>	₺ 5.163.4
Public	₺ 7.039.3
Private	₺ 4.874.5
Male	₺ 5,314.5
Woman	₺ 4,744.9

Source: İŞKUR (2021)<sup>15</sup>

While there are 325,926 people registered, the number of women insured is 90,324. The share of the private sector is 87,2% and the public sector is 12,8%. The monthly average earnings of the compulsory insurance holders (as a basis for the insurance premium) is 5,163TL (August 2021). The ratio of workplaces with 1-9 employees is 88.1 percent in our province

The average income of male insured persons is higher for public institutions (7,039.3TL) and for males (5,314.5 TL and for women, 4,744.9TL)

On businesses that plan to invest in the next year according to investment types, the İŞKUR Report of 2020 shows that the enterprises that have 20+ employees are planning to invest in Adana province, and a 63.8% of those planning to invest in technology.

<sup>14</sup> In the Social Security Institution Statistics, there is no table crossed of these two variables (province-gender and activity codes), the data used is provided by İŞKUR.

<sup>15</sup> İŞKUR - Labour Market Research Adana Province 2021 Final Report, 2021.



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#### 4.5. Open Positions and Job Placements

About the open positions and job placements, between January and October 2021, the number of job vacancies had reached 34,262 (Table 4). The General Worker profession ranks first with 21,421 vacancies (a 62.5% of the total jobs offered)

Open jobs reveal the demands and needs of employers in the labour market. By compiling information about the jobs, the professions needed and the demand for these professions, skills and education level information is obtained.

**Table 4: Occupations with the highest number of vacancies in 2021 (January-October)**

Profession	No. of Jobs
General Worker	21,421
Sales Consultant / Specialist	488
Gas Metal (Mig-Mag) Welder	391
Associate Accountant	362
Security Guard	292
Women's Clothing Model Assistant	271
Cleaning Staff	270
Nurse	259
Call Center Customer Representative	240
Forklift Operator	238
Others	

Source: İŞKUR-2021

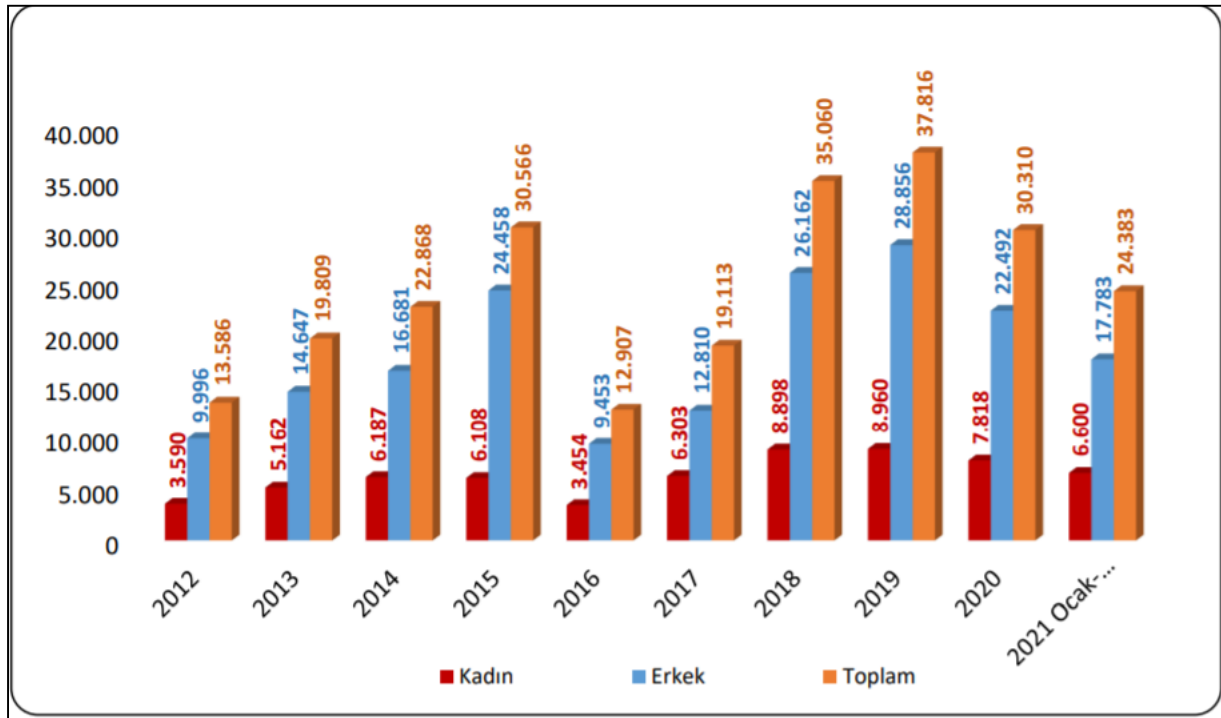
In Adana, according to İŞKUR, 24,383 job placements were made between January to October 2021. The share of women among those who are mediated for their employment is only 27.1%.

In the next Figure, the number of intermediaries for job placement for the period 2012 – 2021 can be seen in the province.



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Figure 6: Number of İŞKUR job placements by years



Source: İŞKUR, 2021

In Adana province, 24,383 jobs were employed in the January-October period of 2021. The share of women among those who are mediated for their job placement is 27.1 percent. Between the occupations with the highest number of job placements in 2021 (January-October) are: General Worker (16,561); Garment Worker (660); Security Guard (537); Acrylic Yarn Production Worker (480); Sales Consultant / Specialist (462) and Call Center Customer Representative (386).

During this period, most of the men in were employed in the professions of General Worker and Security Guard and women are mostly employed as General Worker and Garment Worker professions.

#### 4.6. Registered Unemployment

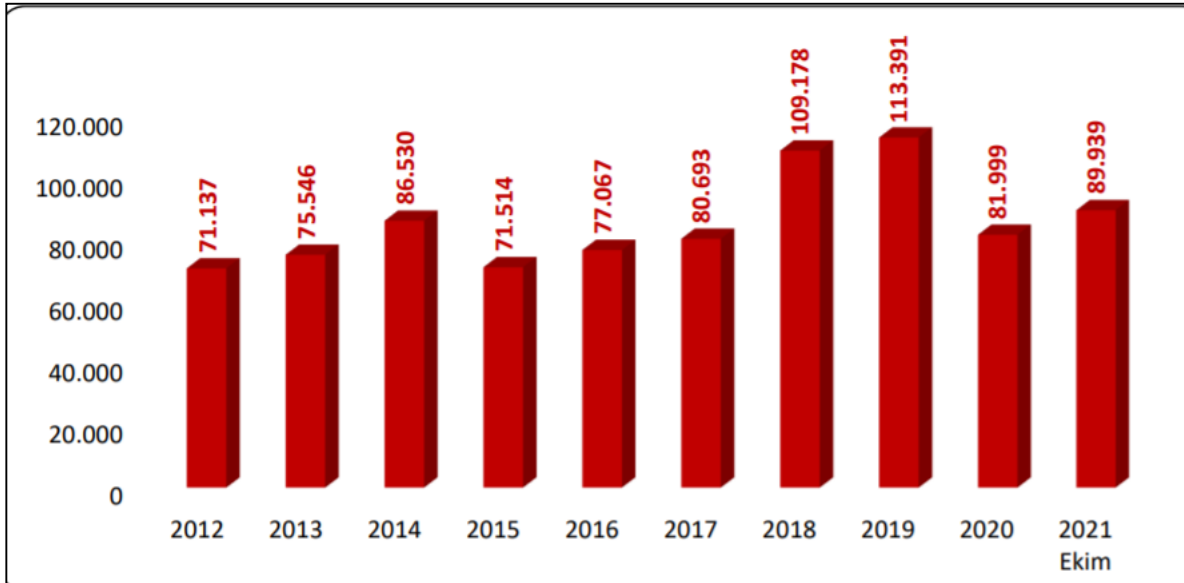
About the Registered Unemployed (those who are active looking for a job in İŞKUR without currently working), the records shows that the number of registered unemployed people in Adana at the end of October 2021 is 89,939, women represent a 45,2% of these people, and the rate of young people between the ages of 18-24 is 31,5%.

The following figure shows registered unemployed İŞ numbers for the period 2012 – 2021 (October)



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Figure 7: İŞKUR Registered Unemployed Numbers by Years



When the number of registered unemployed according to occupations in Adana is examined, it is seen that the most registered unemployed are the General Workers that represents a 19.0%. This profession is followed by Cleaning Officer and Sales.

İŞKUR has many active labor market programs<sup>16</sup> in order to protect and increase employment. Some of the most important are:

- **On the Job Training Program:** In the January-October period in 2021, 3,912 on-the-job trainings in our province were organised and a total of 13,993 people participated in the programs (women represents a 41.4% and men is 58.6 %)
- **Vocational Training Courses,** for gaining a new profession or improving existing professional skills. Throughout all Turkey, in the period of January-October 2021, a 71.7% of the trainees were women.

Regarding the Passive Labor Programs, have played an important role in minimising the negative effects of the corona virus epidemic on the labor market in 2020 and 2021. Some of the programs are Short Working Allowance and Cash Wage Support.

#### 4.7. Part-time Employees

The ratio of part-time employees in enterprises is 38,2%, particularly in the culture, arts, entertainment, recreation and sports sector. In Education represents a 33.3 percent.

Part-time work is a form of flexible work, especially for women and youth in the labour market.

<sup>16</sup>With these programs, the institution looks for an improvement of the professional qualifications of the unemployed and facilitates the transition from unemployment to employment.



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#### 4.8. Skills Needed

Between 2010 and 2018, the number of job placements in Adana has been increased, from 13,586 to 24.383. The İŞKUR, has gone through a national institutional strengthening process, and also national regulatory policy reforms to facilitate framework contracts with employers. These reforms have been to streamline referrals and the hiring of convenient and skilled manual labourers, enabling them to access jobs throughout Adana.

However, despite increases in job placements, many sectors in Adana are expanding rapidly, particularly medium and large enterprises, and employers are unable to find qualified (skilled and experienced) candidates to fill vacancies, and are unable to keep up with growth. Manufacturing companies, perhaps the largest emerging sector in Adana, continue to seek experienced office workers, manual workers (general), university graduates, and engineers. The services sector and retail sector also claim a gap in finding qualified candidates in Adana with communication skills, English skills, or relevant computer literacy skills, to fulfil the roles of salesperson or social media and web specialist.

The qualitative research findings of İŞKUR (2020) have shown that there is a need for a skilled labour force in Adana:

- Employers of large and medium-sized companies underlined the fact that the skilled labour force does not prefer to work in Adana. New generations studying in larger cities prefer to stay there, and graduates of Adana universities are looking for jobs in other cities. This emigration of the skilled labour force creates a shortage in skills, and is one of the leading reasons for unemployment in Adana. Interviewees regularly underlined the fact that they had to provide extra benefits, to retain potential employees and to increase the attractiveness of employment in Adana.
- On the major skills needed:
  - Experienced office workers and manual workers (general): The participants underlined the importance of experience in both office-based jobs and manual labour, and they argued that it was almost impossible to find experienced or skilled workers.
  - University graduates: As a result of emigration, (discussed above), employers could not easily find university graduates to employ in clerical or administrative jobs.
  - Engineers: Many manufacturing companies were looking to employ engineers, with the availability of more skilled jobs in construction companies increasing.
  - Technical personnel (manual workers): As a result of the emergence of manufacturing companies in Adana, there was a need for technical personnel to be employed in jobs such as staining, lathe operation, and mechanics. The graduates of the vocational training centres in Adana possessed this theoretical expertise, but lacked practical experience.
  - Salespersons: Although sales businesses seemed to be reserved for unskilled or minimally skilled workers, employers stated that there was a need for skilled salespeople trained in sales and marketing techniques, communication, and other skills. In particular, having a good presence and diction were agreed, by respondents, to be important skills. According to employers, there were a few skilled salespeople in Adana, and qualified employees were being transferred to other companies, outside Adana.
  - Social media and web specialists: According to the participants, companies were failing to find computer experts, especially with social media expertise or being capable of web design. Respondents stated that these jobs were very popular among young people, but that the





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majority of them were still not skilled enough to satisfy the needs of large and medium-sized companies.

#### 4.9. Vocational Training Opportunities

Adana province has 410 vocational training centres, which is higher than the national average per province, yet demand for these vocational training classes is very high and classrooms are often crowded. İŞKUR organizes and conducts most of the vocational training programs in Adana, although various public institutions, (such as Seymer and Public Education Centres), and a small number of NGOs, also contribute to vocational training programs in the Adana region.

Participants often found these vocational training courses to be too theoretical and of very low quality, as well as often being irrelevant and incompatible with Labour Market Assessment. Further, İŞKUR-administered vocational training centres do not currently have programs specifically targeting groups such as immigrants and women, (who contribute significantly to unemployment rates in Adana), with the exception of “life skills courses”.

#### 4.10. Entrepreneurship Opportunities

IN 2018, the Report published by GIZ<sup>17</sup> after a qualitative survey, shows that a minority of respondents (24.8%) expressed a desire to start their own business, primarily due to the economic pressures of start-up and operational costs, with women (17.9%) less willing than men (31.3%). Despite the availability of micro credit schemes and public lending programs, only 6.9% of respondents had previously heard of these programs aimed at alleviating the burden for people financing their own business. The most popular types of business in which respondents in Adana expressed an interest in starting included beauty parlours, cafés, fast food restaurants, retail shops, and grocery stores.

## 5- SUMMARY

Some sectors in Adana province are experiencing significant growth, namely manufacturing and construction (partially due to the recent immigration of Syrian refugees), are two emerging sectors, and the two sectors with the largest capacity to formally employ Adana residents. There are nearly 12,000 manufacturing firms within Adana, of various sizes, and over 5,000 construction firms. The expansion of regional headquarters for information and communication technology (ICT) firms already present in Adana provides further employment opportunities, as does the health sector (and medical tourism), and increasing regional investment in the energy sector. Despite port access and the increasing potential for tourism, the textile industry has lost its prominence in the provincial economy.

Only 46.9% of the active population is included in the labour force, with 65,8% of those being men and 28.5% being women. Even when there is no significant gender gap in terms of educational achievement among those participating in the labour force, particularly among the younger generations, the access for women to the labour market is remaining low. One of the most important reasons for the exclusion of women from the labour force are house duties (50.8%).

**TAT**

**December 2021**

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<sup>17</sup> GIZ, Op. Cit.





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