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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

DESK RESEARCH REPORT – BURSA WORKSHOP





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FOW PROJECT

INTERVENTION 13: WORKSHOPS FOR NEW EMPLOYMENT STRATEGIES

BURSA WORKSHOP: 21 OCTOBER 2021

DESK RESEARCH REPORT

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 they had been developing. The Bursa workshop will be held on 21 October 2021, intended to examine issues of sectoral importance to that province, to ensure that these are taken into account in the drafting of new policies and strategies going forward.

This short Report is an economic analysis of Bursa, drafted to contribute to an understanding of which issues might become the focus for the workshop.

2) BURSA: GOVERNANCE AND POPULATION

- **Population**

Bursa province is subdivided into 17 district municipalities, with the city of Bursa providing administrative functions for the province. The population is just over 3.1m with a population density of 285 per km². The province has 17 industrial zones and a foreign trade volume (2020) \$21.3 bn.¹

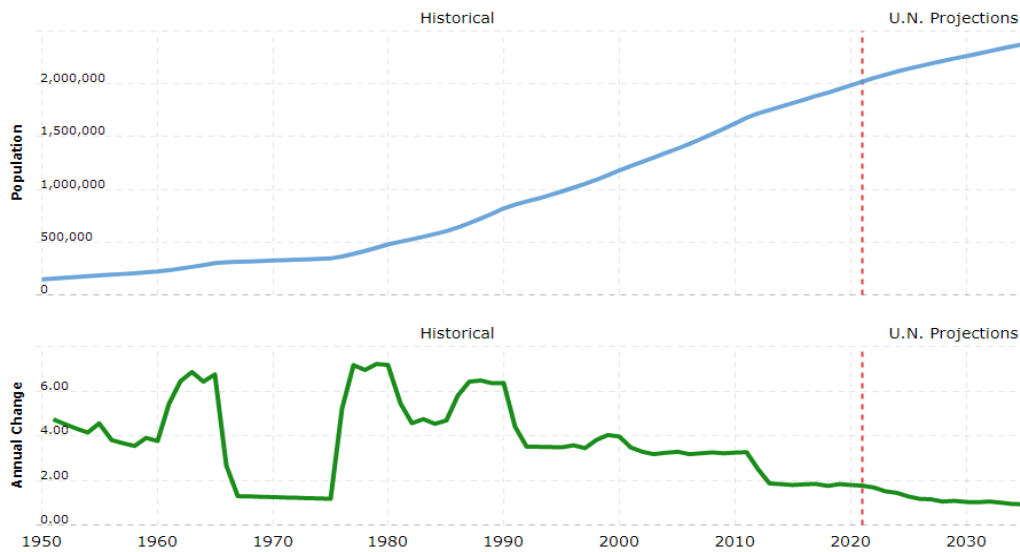
The population of Bursa city is just over 2m, and has seen a growth of about 1.8 % year-on-year over the past 4 years. Osmangazi is the central metropolitan district of the city of Bursa, as well as being the fourth largest overall municipality in Turkey. Osmanağzı Municipality has 136 neighbourhoods and a population of approximately 0.8m (as of 2014). On its own, it would be the 8th largest city in Turkey.

According to figures from the UN, the population will continue to grow to about 2.4m by the year 2030, although the rate of growth will slow down.

¹ The data is actualized in September 2021 for the Bursa Chamber of Commerce and Industry



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Data Source: [United Nations - World Population Prospects](https://www.macrotrends.net/cities/22670/bursa/population)
<https://www.macrotrends.net/cities/22670/bursa/population>>Bursa, Turkey Metro Area Population 1950-2021
 www.macrotrends.net. Retrieved 2021-09-16.

- **Migration**

Migration to Bursa has mainly been from Syria (with some from Afghanistan, Iraq, Iran and Somalia): there are 134,000 registered Syrians in Bursa, making it the 7th largest recipient of Syrian arrivals (and 4th for other migrants). The indication is that employment support for refugees remains quite weak.

3) ECONOMIC ACTIVITY

- **GDP Contribution**

One of Turkey's most industrialised cities, Bursa has a prominent place in the automotive, machinery, textiles, and food processing industries. Alongside the industrial sector, trade, tourism, services, and agriculture are also well developed in the province.

Bursa is one of the first five provinces with the highest share of GDP in Turkey, at current prices in 2019. When the activities which constitute GDP were examined, the share of Bursa in industry was 39.3%, information and communication activities was 0.7 %, finance and insurance activities was 1.7%, professional, administrative and support service activities was 3.7%, real estate activities was 5.7%, services sector was 21.6%; public administration was 7.8%; agriculture was 3.8%; construction sector was 4.4% and net taxes on products was 9.9%.²

- **Bursa Organised Industrial Zone**

Bursa's Chamber of Commerce and Industry (BTSO) and its partners have enhanced the development of competitive clusters, including rail systems, aerospace, baby and children's clothing, and raw vegetables and fruits. In the 1960s the State Planning Organisation provided a large-scale survey to find the most suitable industrial city in Turkey. The research was focused on Bursa, Istanbul, Adapazarı,

² TUIK (2020) in the document "Gross Domestic Product by Provinces, 2019"



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Adana, Mersin and Zonguldak, and resulted in Bursa being selected as the optimum city. Bursa Chamber of Commerce and Industry had taken over this project and the first organised industrial site, Bursa Organised Industrial Site (BOSB) started operations in 1961. Since then, Turkey has adopted the concept of organised industrial zones in many different cities all over Turkey. Today, there are 17 organised industrial zones in Bursa

- **Development Plans**

The **Bursa Master Plan (2012)** and **Regional Development Plan (2014-2023)**, address environmental resilience issues such as the preservation of ecosystems, balanced development between urban areas and the conservation of lands, and the reduction of natural and technological hazards. The long-term vision embodied in the 2014-2023 Regional Development Plan provides Bursa's future framework for sustainable development.

The **Local Agenda 21 programme**, created in 1997, established the Bursa City Council to promote policy coordination among stakeholders and decentralisation of the local decision-making process with a special focus on the concepts of "sustainable development" and "good governance". They are looking for a city's fast economic development in a low carbon and climate-resilient way (Source OECD).

The Regional Development Agency, BEBKA, plays an important role in enhancing overall development and co-operation between Bursa's public and private sectors. It was created in 2009 mainly to reduce disparities on regional development.

- **Sectoral Activity**

Sectoral Councils

The Bursa Chamber of Commerce and Industry (BTSO) broke new ground among the Chambers of Commerce and industry in Turkey by initiating Sectoral Councils to unite the business community in Bursa. 18 sectoral councils were established at the beginning to add momentum to the activities of the committees, to ensure the collaboration of the 51 committees and to shape a common strategy and have prepared strategic development reports. At this moment they have 23 sectoral councils.

BTSO has shared the council reports prepared for each sector with the public and begun to take steps to realise the action plans. Important projects such as Textile Excellence Centre in Bursa, Energy Efficiency Centre, the foundation of an Energy Agency and the BTSO Training Kitchen have started because of these reports. The Sectoral Councils became the dynamo of the city and currently number 23:

1. Environment and Clean Production Council
2. Valuable Mine and Marble Council
3. Construction Council
4. Logistics Council
5. Machinery Council
6. Furniture Council
7. Information Technology and Automation Council
8. Retail Trade Council



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9. Design Council
10. Ready-to-Wear Council
11. Economic Relations and Finance Council
12. Energy Council
13. Automotive Council
14. Foreign Trade Council
15. Education Council
16. Chemistry Council
17. Tourism Council
18. High Technology Council
19. Textile Council
20. Food, Agriculture and Livestock Council
21. Services Commerce Council
22. Health Council
23. Organised Industrial Zones Council

- **Transportation and Automotive sector**

The Eleven Development Plan of Turkey (2019 – 2023) mentions Bursa in two sections of the point 2.2.1.1.5. Logistics and Energy Infrastructure:

Paragraph 334. “To extend the inter-modal transportation and increase the competitiveness of the industry; railway branch lines and logistics centres, which will serve petrochemical plants, manufacturing facilities for the automotive industries, ports, OIZs, and mining sites, will be completed and the share of railways will be increased in freight transport”.

Paragraph 335.2. “The Bandırma-Bursa-Yenişehir-Osmaneli railway line, which will serve the manufacturing industry sectors in Bursa and Bilecik and the neighbouring cities, will be completed. The Plan also add : “To meet the need of qualified labour force in Bursa (and other cities) where the automotive industry is concentrated, it will be ensured that automotive industry vocational high schools and vocational schools will be established in these regions and their capacities will be improved”.

Bursa is the largest production centre of the Turkish automotive industry. Factories of motor vehicle producers like Fiat, Renault and Karsan, as well as automotive parts’ producers like Bosch, Mako, Valeo, Johnson Controls, Delphi have been active in the city for decades. An export-driven automobile industry is influenced by fluctuation in the foreign market and the need for high-skilled labour force is critical. Bursa’s economy has a strong concentration of automotive manufacturing, textile and furniture production, and an increasing service sector that supports production and development activities in the secondary sector. As the local economy shifts towards specialised and advanced automobile production, shortages in skilled labour have become an increasing challenge. Failure to supply the labour market with the appropriate level of highly skilled workers will limit not only the growth of the local economy, but also the ability of local firms to compete globally. Furthermore, Bursa’s export-driven manufacturing industry has meant that reduced demand for its products in foreign markets adversely impacts its economic growth, innovation capacities and employment development.

In a 2021’ study by the European Training Foundation (ETF) the main findings for the sector at a national level are:



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- There are various factors which may be constraining growth in the automotive sector. Most companies indicated a shortage of skilled workers as the main limiting issue in the interviews. One of the reasons for this is that educational institutions do not produce sufficiently qualified candidates for working in industry. Other considerations, such as the emigration of high-skilled workers and the comparatively low attractiveness of the automotive sector, also play an important role.
- The interviews with companies suggested that one problem related to skills mismatch is the speed of technological change: despite the difficulty of keeping pace with rapidly moving advances, educational institutions should be aligned with such developments and connect their curricula with the real needs of automotive plants.
- Based on the interviews, companies follow various strategies to meet their skills needs, ranging from recruiting new graduates from universities to posting advertisements on online job portals. Their recruitment tools change according to the level of skills/job profiles required.
- The sector has existing links with the educational system. At the same time, it seems that the educational system is unable to provide all the competences required by the automotive industry. After hiring, all new graduates, at whatever level, require on-the-job training (according to the interviews). Thus, automotive companies provide instruction, mentoring and coaching after recruitment in order to introduce new graduates to the job and the working environment. A closer collaboration between the education system – both universities and vocational schools – and companies is advisable.
- Companies try to compensate for the skills gap through various approaches, for example widening their training strategies by offering in-house learning and on-the-job training, or buying provision from external actors, such as private companies or universities. Moreover, it is quite common in the automotive sector for companies to set up their own internal academies and training centres, which is the case with most OEMs. This shows the importance given to skills development by the established/formal private sector in Turkey. But more cost-effective and innovative solutions are needed to address the needs of smaller, less formal companies, probably through utilising the public-private partnership approach.³

New jobs will also appear on the horizon that will consist of ‘translators’ between machines and people. These professionals will understand the logic of the machine/data/software process and will be able to interpret the user needs for technicians and developers. Understanding the process will entail translating the needs into robotic language. Overall, discussions with stakeholders and companies confirmed two trends:

- a tendency to be vertically specialised in a specific technology or area but having the capacity to apply it transversally over different jobs, with a horizontal knowledge of many disciplines, a characteristic defined by companies as a ‘T-shape’ profile, or even a ‘comb-shape’ skills profile, with deep expertise on more than one subject.
- the level of competence required by each worker will increase and become broader, shifting the occupational structure towards more highly skilled profiles. Finally, soft skills such as resilience, flexibility, problem solving and creativity are highly valued by companies and shareholders, an aspect that should be considered when policy makers and educational programmes are considering future skills. For companies involved in international transactions, the lack of or limited knowledge of English or German is a frequent problem; having a basic knowledge of English has become a necessary skill for all types of workers. The

³ Kita, L. (2021) A case study of the automotive sector in Turkey; ETF



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debate on future skill needs is therefore not just about technical skills, but the mix of technical and soft skills. (Source: European Training Foundation, 2021)

- **Textile sector**

The city has long been associated with textiles, dating back to its pivotal role in the Silk Road trade, and is still a major centre for textiles in Turkey and is home to the Bursa International Textiles and Trade Centre (*Bursa Uluslararası Tekstil ve Ticaret Merkezi*, or *BUTTİM*). Bursa was also known for its fertile soil and agricultural activities, which have decreased in the recent decades due to the heavy industrialisation of the city. Textile industry includes nylon, polyester, wool, spools, weaving, towel, dye, and embroidery.

Bursa Textile Confection and R&D Centre

BUTEKOM is a “Sectorial R&D Centre” founded in 2008. Its current partners are the Bursa Chamber of Commerce and Industry (BTSO) by 50%, Uludağ Textile Exporters' Association (UTIB) by 37.5% and Uludağ Apparel and Clothing Exporters' Association (UHKIB) by 12.5%.

The aim of BUTEKOM is to enable the textile, ready-made garment and apparel companies to manufacture innovative and technical textile products, to develop high-added-value products for fashion and brands, to increase the production efficiency and to supply necessary training, coordination and communication among the stakeholders in time. For this purpose, the task of BUTEKOM is to focus and steer dispersed R&D activities of all textile and ready-made garment companies in Bursa and its surrounding on the defined subjects. In this context, current basic activities of BUTEKOM can be classified as follows: Preparation and application of R&D projects, cooperation between institutions, creating expert member groups, making environmental analysis and cleaner production applications, technical textile consultancy, sector-specific seminars and trainings, workshops, following the sectorial developments, technical fair reports and follow-up of the trend areas.

BUTEKOM has been performing many activities in accordance with the priorities of the sector and attending meetings concerning the problems of the sector in different platforms. The trainings in the sector provided almost 2.500 people.

<http://www.butekom.org>

- **Other Sectors**

Bursa is a major centre for **tourism**. One of the most popular skiing resorts of Turkey is located at Mount Uludağ, just next to the city proper. Bursa's thermal baths have been used for therapeutical purposes since Roman times.

Bursa became the new favourite of the **logistics** sector. The logistics sector turned its route into Bursa, which has increased its strategic importance with its high-speed train and highway projects as well as its foreign trade volume. 2 annually 71 competitions in the sector where new actors are added BURSA-Fast growing global logistics industry, it brought into production bases in Turkey from Istanbul and began to shift to areas where industry is concentrated. Bursa, which stands out with its automotive, textile, machinery, and food sectors, has taken its place among the new favourites of the



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logistics sector. The charm of the city; ports, high-speed train, and highway projects, even more, Bursa Chamber of Commerce and Industry (BTSO)

4) WORKFORCE

4.1. General indicators

According to the basic labour force indicators, while the population in the Region is 3.214m, the labour force participation rate is 51.3%, the employment rate is 45.5% and unemployment rate was 11.2% in the region in 2019.⁴

The labour force participation rate in the province in 2016 was 48.4%, the employment rate was 43.3%, and the unemployment rate was 10.5%, indicating an increase in both the participation and employment rates, but also an increase in unemployment.⁵

Table 1: 2019 TURKSTAT Regional Labour Force Indicators

TR41 (Bursa, Eskişehir, Bilecik) ⁶	Total	Female	Male
Population aged 15 and over (Thousand People)	3.214	1.612	1.602
Labour Force (Thousand People)	1.648	533	1.115
Employed (Thousand People)	1.463	460	1.003
Unemployed (Thousand People)	185	73	112
Population not included in the labour force (Thousand People)	1.566	1.079	487
Labour force participation rate (%)	51,3	33,1	69,6
Employment rate (%)	45,5	28,5	62,6
Unemployment rate (%)	11,2	13,7	10,1

Source: ISKUR

According to the data in Table 1, while the male labour force participation in the market is about 69.6%, the female labour force participation in the market is only 33.1%. Regarding employment, the female rate is 28.5% and the male rate is 62.6%.

While the number of registered unemployed in Bursa at the end of 2020 is 95,562, the rate of women among these people is 47.4%; The ratio of young people between the ages of 18-24 is 36.0 %.

When the number of registered unemployed in Bursa is examined according to occupations, the profession of Manual Worker (General) is at the top of the professions with the highest number of registered unemployed, and there are 11,237 unemployed registered to the Institution in this profession in Bursa. The share of this profession in the total registered unemployed in Bursa is 11.8%. This profession was followed by Sales Consultant/Specialist and Cleaning Assistant, respectively.

4.2. Sectors and companies

⁴ The ISKUR Report of 2020, with data from TURKSTAT and own research

⁵ ILO Report, 2016

⁶ The Classification of 2nd Level Turkey Statistical Regional Units including Bursa province is defined as TR41 (Bursa, Eskişehir, Bilecik).



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About the companies, in data provided by ISKUR, it is important to consider SSI insured and workplace indicators (Table 2). The Social Security Institution publishes the insured statistics monthly. Within the scope of these statistics, the detailed insured numbers of the provinces and the number of workplaces with insured employees are obtained. The rate of workplaces with 1-9 employees is 85.8% in Bursa. While the number of workplaces with 100 or more employees is 916, a total of 267,586 employees are employed in these workplaces.

Relevant information about the sectors was obtained by the 2020 Labour Market Survey:⁷

- **The importance of the manufacturing sector:** The ratio of the workplaces in the manufacturing sector among the businesses within the scope of the study in Bursa is at the level of 50.7%. The weight of the enterprises in the manufacturing sector among the enterprises with 20 or more employment in general is 32.9%. The weight of the enterprises in the manufacturing sector, which ranks first in Bursa, is above the Turkey average.
- After the manufacturing sector, the largest number of businesses operate in the **wholesale and retail trade sector**. While the share of enterprises in the wholesale and retail trade sector in our country is 19.4, the share of the wholesale and retail trade sector in Bursa is 16.3%. The ratio of those operating in the Manufacturing, Wholesale and retail trade and Construction sectors among the enterprises employing 20 or more people within the scope of the work in Bursa is 74.4%.

The analysis of this data should be done considering that the industry represents a 39.3% of the GDP of Bursa and shows the relationship between multifactor productivity growth and the structure of employment. In order of this, it is possible to observe some factors:

- **Part-time employment/Flexible work-** changes in the incidence of these work arrangements: The ratio of enterprises with part-time work in Bursa was 21.9%. Among the enterprises in the culture, arts, entertainment, recreation and sports sectors, the ratio of enterprises with part-time employees is 63.6%. While women constitute 29.3% of the employees in enterprises with 20+ employment in Turkey, this rate is 28.9% in Bursa. When Bursa province data is examined, the rate of female employees in enterprises without part-time employees is 26.5%, while the rate of female employees in enterprises with part-time employees is 34.2%.
- **Men are employed more intensively**, especially in night work, in shift-working establishments. The ability of women to work night shifts is also subject to special regulations in terms of legislation. It is an expected situation that the male workforce will take place at a higher rate in the enterprises where shift work is carried out due to reasons such as legal obligations and family responsibilities.

⁷ Statistical Classification of European Community Economic Activities (NACE) Rev. According to the 2 classification, a full census in 77 provinces and 4 provinces (Ankara, Istanbul, Izmir) for enterprises with 20 or more employees in 17 sectors, excluding Agriculture, Public Administration and Defense, International Organizations and Their Representations, Mandatory Social Security, Activities of Households as Employers. Bursa) was studied by sampling method. In enterprises with 10-19 employees, employers were contacted by sampling method in 74 provinces and full census in 7 provinces to obtain results across Turkey.



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- Other important consideration about companies is that the ratio of companies carrying out **R&D studies** throughout the province was 24.5%. The ratio of companies with R&D work among workplaces in the manufacturing sector is 38.5%. Proportion of enterprises with R&D work in the information and communication sector
- **About the Proportion of companies planning investments in the Next Year**, companies that have 20+ employees and are planning to invest in Bursa, the rate of those planning to make additional investments is 67.1%.
- **A total of 487,779 employees**, including 346,819 male employees and 140,960 female employees, were identified for businesses with 20+ employment and in the sectors covered by the research in Bursa. Based on gender, 346,819 employees consist of men (71.1%) and 140,960 employees are women (28.9%).

Table 2. Employees per sector

Sectors	Male Employees	Female Employees	Total Employees
Production	218.627	72.811	291.439
wholesale and retail trade	40.888	26.858	67.746
Transport and storage	19.732	3.768	23.499
Administrative and support service activities	16.932	5.918	22.850
Accommodation and food service activities	11.223	7.452	18.675
Build	13.520	2.285	15.805
Professional, scientific and technical activities	8.877	3.352	12.229
Human health and social work activities	3.915	7.784	11.699
education	4.047	7.187	11.234
Mining and quarrying	2.352	108	2.461
Finance and insurance activities	895	1.408	2.303
Information and communication	1.295	734	2.028
Production and distribution of electricity, gas, steam and air conditioning	1.523	256	1.779



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Culture, art, entertainment, recreation and sports	983	346	1.329
Other service activities	661	370	1.031
Real estate activities	738	212	950
Water supply; sewage, waste management and remediation activities	610	112	722
TOTAL	346.819	140.960	487.779

Source: İSKUR

The sectors with the highest number of employees in Bursa are Manufacturing, Wholesale/Retail trade, and Transportation/Storage sectors. Among the total employees, the ratio of those working in these three sectors is 78.5%.

The sector with the highest female employment is the Manufacturing sector. The share of those working in the manufacturing sector among the total female employees in the province is 51.7%. The sector with the highest rate of female employees in Bursa is the Human health and social service activities sector. The ratio of women among those working in the human health and social service activities sector is 66.5%.

It is seen that the number of female employees in the Human health and social work activities and Education sectors is higher than the males throughout Turkey.

4.3. Another important points on employment in Bursa:

- Job postings for 61,620 people in Bursa province in 2020 were conveyed to İŞKUR by employers. In this number, there are 10,216 professions with the Manual Worker (General) vacant job in the first place. The share of this profession in the total number of vacancies is 16.6%. This profession is followed by Machinist (Sewing) and Other Manufacturing and Related Workers (With Machinery).
- 34,295 job placements were made in Bursa in 2020. The share of women among those who are mediated for their employment is 40.7%.
- The vacant job rate in Bursa was determined as 1.0%. In Turkey, the vacant job rate is 1.1%, and Bursa province is behind the Turkey average in terms of job vacancy rate. The sector with the highest vacancy rate is the Administrative and support service activities sector with 2.9%. When the distribution of vacant jobs by occupational groups is examined; It has been determined that the most vacant jobs are in the Facility and Machinery Operators and Assemblers occupational group, and there are 2,070 vacancies in this occupational group during 2019. The second occupational group with the highest number of vacancies in Bursa is Craftsmen and Workers in Related Jobs is a profession group. The share of vacant jobs, which do not require any level of education, is 33.4%.



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- Gender Preference for Available Vacancies in Bursa: While the rate of vacant jobs in Bursa, where employers stated that gender is not important, was 49.9%, this rate was 60.3% in Turkey. While the tendency to employ female labour force for current vacant jobs is 7.3% in Turkey; It was realised as 9.1% in Bursa province. In 32.4% of vacant jobs across Turkey, employers will prefer men in their vacant jobs.
- When the professions that are difficult to supply in Bursa are analysed according to sectors, it is seen that the most difficulty is in recruiting personnel in the Manufacturing sector. When we look at the professions that are difficult to obtain in Bursa, it is seen that the profession of Weaving Machinery Operator/Weaver takes place in the first place. This profession is followed by the Machinery (Sewing) profession.
- When we look at the reasons for the difficulties in recruiting personnel, the first rank is "The lack of personnel with the necessary professional skills/qualifications".
- While 14.6% of enterprises across Turkey answered that employment would increase for the next year, the rate of employers who predicted that employment would increase in Bursa is at the level of 15.0%. On the other hand, while the rate of employers who think that employment will decrease is 2.0 throughout the country, this rate is 1.9 % in Bursa.

4.4. Labour Programmes existing in Bursa.

- **Active Labour Programmes**

On- the-Job Training: The main purpose of the on-the-job training program is to increase the employability of people who do not have professional experience and sufficient work experience by gaining professional experience and work experience. In addition, it is to provide employers who have difficulty in recruiting qualified workforce, to have detailed information about job seekers and to make the right decision about hiring by observing and training the people they will hire at the workplace for a certain period.

Vocational Training Courses designed to increase the employability of individuals by gaining a new profession or improving existing vocational skills. 3,520 trainees attended 130 vocational training courses held in Bursa in 2020. While 2,089 female trainees attended the vocational training courses opened in our province last year, the number of male trainees was 1,431.

- **Passive Labour Programmes**

To minimize the negative effects of the Corona virus epidemic on the labour market, 2020 has been a year in which Passive Labour Market Programs such as Unemployment Allowance as well as Short Working Allowance and Cash Wage Support were used quite effectively.

5) SUMMARY

Bursa province has a population of 3.2m. Labour force participation rate is 51.3%, with an employment rate of 45.5% and an unemployment rate of 11.2% (2019). While traditionally associated with the textile industry, Bursa has a diverse and developed economic base. The manufacturing sector is now a major force in the province, with a 50.7% share of the workplaces in the province. Bursa has an active



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Chamber of Commerce and Industry which has pioneered initiatives to maximise cohesion among the main economic players, and has also taken a lead in the development of skills and new initiatives, including a drive towards import substitution. There is a focus on the green economy, with innovative schemes for wastewater treatments. The province faces the same skills mismatch challenges as many others, but has recognised the problem and appears to be addressing it, with a lead taken, again, by the Chamber of Commerce through its accredited MESYEB (BTSO Vocational Competence Examination and Certification Centre), its BUTEKOM (Sectorial R&D Centre) and its BUTGEM (BTSO Education Foundation).:

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