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Antalya Province Labour Market Analysis

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Summary

As one of the leading provinces of Turkey in terms of level of socioeconomic development, Antalya is also a centre of gravity in internal migration. This situation, while presenting opportunities associated with a young and dynamic population composition, is at the same time a challenge for low education and qualification level of labour force. As a result of migration as well as positive developments in the sectors of services and agriculture, the engines of local economy, the province's share in total population and GDP of the country is increasing. Industry has a rather limited share in the economy of the province.

Turkey is rising in her status as one of the global attraction centres for tourists and this development finds its reflection in tourism revenues as well. In 2008, Antalya hosted one-third of all tourists entering the country. As a determining core in the sector of services, tourism creates a cluster around itself and triggers production in many areas. Hence, in addition to hotel, restaurant, airport, transportation and support services, other activities such as furniture production, hotel textiles, food-beverage services, cleaning, special security and landscaping also gain importance. In agriculture, the province supplies a large share of fresh fruits and vegetables in the country. Antalya leads the list of provinces in Turkey particularly in greenhouse farming. Besides fruits and vegetables, culture of decorative plants constitutes another significant agricultural activity. Clustering in agriculture emerges in such areas as seed-seedling production, plastics and equipment production for agricultural use and production of agricultural chemicals. Parallel to rising demand as a result of population growth, there are developments in such branches as construction, education and health in addition to other activities like retail trade, construction materials, furniture and foodstuffs. Thus, as far as manufacturing industry is concerned, foodstuffs, metal, plastic, textiles, woodworks and furniture production gain weight to respond to the needs of both resident population and tourists. Of exports from the province, processed fresh fruits and vegetables have the largest share. Interviews made with business circles as a part of the UN Joint Programme survey suggest that the province of Antalya is found promising in terms of its business capacity and also attractive for both living and working for its present level of socioeconomic development and life quality it offers. In general, business circles in Antalya are satisfied with opportunities in the province and they look hopefully to future.

Given this overall picture, taking a look at the characteristics of labour market in NUTS2-TR61 region including Antalya in 2009 we find that labour force participation rate is above the country average, which mainly derives from the fact that female labour force participation rate in the region is 10 percentage points higher than the country average. Holding true for employment rates as well, this situation is associated with the employment structure of the region which is based on services and agriculture. However, the level of education of labour force is low since about two-thirds (64%) of labour force has their educational background under high school. In the young age group 15-24, those with educational background under high school make up 55% of total and this is 9 percentage points lower than the global figure for labour force. Still, the fact that over a half of young people in labour force has no high school diploma signifies a serious gap in education. As the level of education of youth rises, labour force participation rates increase and the relationship between educational status and labour force participation becomes more pronounced particularly for young women.

In the region, trade and services accounted for more than half of total employment while one-third was in agriculture and 14% in industry. In male employment, services and trade have the largest share with 57%, followed by agriculture (26%) and industry (17%). In female employment, on the other hand, the largest share is that of agriculture with 50%, followed by services and trade (42%) and industry (8%). As for status at work, 53% of males are wage earners, 41% are employers or self-employed and 7% is unpaid family labourers. Of females participating to employment 41% are wage earners, 10% are employers or self-employed and 49% are unpaid family labourers. Having no economic return, unpaid family labour is still the most prevalent form of employment for women. While in agriculture males are mainly employers or self-employed and women are unpaid family labourers, in non-agricultural sectors about two-thirds of males and three-fourths of women are monthly or daily paid wage earners.

Educational weakness of labour force reflects in employment as well. 3% of illiterate people employed consist of women working in agriculture. Leaving illiterate aside, 83% of all employed in agriculture have educational background lower than high school. Also, 76% of those employed in industry, 61% of people employed in trade and 41% of others employed in services have no high school diploma. In all sectors other than services, the majority of people employed have educational background lower than high school.

Looking at the social security status of those in employment, we see 46% are not covered by any security scheme. This is 2 percentage points higher than the country average which was 44% in 2009. The share of working people not covered by social security is 77% in agriculture, 39% in industry, 34% in trade and 22% in services. In gender terms, 37% of working males and 68% of females work informally. In all branches of economic activity, informal employment is much more common among females. A similar situation can be observed in employment by occupational groups. While 36% of males are employed in unqualified jobs and agriculture, 60% of working females are engaged in similar jobs, suggesting that unqualified employment is more common among females.

According to İŞKUR's Antalya Province Labour Market Survey, the first five sectors in formal male employment are hotels and restaurants; wholesale and retail trade; construction; other community and personal services; and transportation, warehousing and communication. Employment in all services taken together makes up 72% of total male employment while the share of industry is 15%. The first five sectors in formal female employment are hotels and restaurants; wholesale and retail trade; other community and personal services; health and social services; and transportation, warehousing and communication. Employment in all services taken together makes up 80% of total female employment while the share of industry including construction is 17%. Leaving aside construction, employment patterns of males and females are largely similar.

In Antalya, the number of formally employed persons increased by 45% in the period 2004-2009 from 214,553 to 312,082. There are significant employment increases in various sub-sectors of services, among which increase in the number of formally employed people in trade and boarding is particularly striking. Except motor vehicles, etc. formal employment increased by 47% in wholesale and 71% in retail trade in this period. Employment increase in boarding facilities is by 54%. Land transportation, food and beverages are also areas witnessing increases in employment and all these are associated with tourism sector. Parallel to increase in the number of tourists, there is employment increase in all service areas related to tourism. Other significant increases in employment have taken place in administrative services, education and health.

In 2009, the rate of unemployment in the NUTS2-TR61 region (11%) was below the country average (14%). The rate of female unemployment (13%) is higher than that of males (11%). While the rate of unemployment in the age group 15-19 and 20-24 are much higher than the region average with 19% and 25%, respectively, these rates are still lower than corresponding country averages. Among unemployed females, the share of females with high school and university education is much larger with 57% than the share of males (33%). It appears that females take part in labour force as their educational status get higher and they do seek jobs, but are more affected by unemployment when they fail. The relationship between the branch of economic activity and level of education shows that in all sectors people with education lower than high school constitute the largest group of unemployed. Considering branches of economic activity in which they were once employed, it appears that those who used to work in industry and trade are more vulnerable to unemployment.

In 2009 the number of unemployed registered with İŞKUR was 35,448 of whom 24,037 were males and 11,411 were females. Of 6,236 persons those placed in jobs, 4,260 were males and 1,976 were females. Those placed in jobs make up 18% of total unemployed registered. Among females registered as unemployed, the share of those with high school or higher education is much larger with 64% than males in the same educational status (46%). On the other hand, when job placements are examined, it is seen that placement in unqualified jobs is more common for females (53%) than males (44%). It can be inferred from this that despite their relatively higher educational background, females are mainly placed in unqualified jobs. In labour force training courses organized by İŞKUR in 2009, a half of trainees received training in occupations related to tourism.

Economic indicators in Antalya relating to growth, export potential and foreign exchange revenues show that the engine of development in this province is tourism and that this particular sector triggers production of goods and services in many other branches as well. Associated with tourism, the leading source of employment in labour market is various service areas including hotel and restaurant services in the first place. Consequently, in order to reduce youth unemployment and promote decent jobs, it is clear that priority needs to be given to tourism and related sectors. It is true that the increasing share of agricultural production in foreign trade also points out to further potential for employment. Nevertheless, in all these areas, largely seasonal character of employment, irregular incomes and difficulties in accessing social protection constitute significant problems. Low education and qualification level of labour force and difficulties in finding qualified workers stress the importance of vocational training for emerging sectors. Still, the solution of the problem requires, in addition to qualification and skill building training courses, the development/expansion of economic activities which will provide not occasional but full time and formal jobs. Hence, in the context of extending tourism activities over 12 months of the year, it is crucial to diversify activities other than tours and entertainment and promote commercial and health tourism. The need for diversification is also relevant for agricultural and other seasonal activities.

The gender dimension in employment is very important. Given that female unemployment rates are higher despite their relatively higher level of education, it is apparent that there is need for special sensitivity in encouraging their participation to wage employment, identifying women as a target group in vocational training and in job placements.

In the UN Joint Programme Antalya study launched to identify priority sectors which have sustainable economic growth potential and potential for offering decent job opportunities particularly to youth, ten sectors were selected for their higher values in terms of labour and non-labour factors. The first two are related to the production of agricultural goods with high added value. The following three are all tourism related: health services tourism, elderly care and health tourism and alternative tourism that include business, trade and fair tourism. The rest consists of some sub-branches of manufacturing industry. The first is food processing, the second is production of metal items except machinery and equipment, the third is production of construction materials and the fourth is boat building. Finally, there is the sector of general business services.

When it comes to production of high value added agricultural goods, employers stress the need for certificated vocational training. In agriculture, female labour is traditionally and commonly used. Hence, training of women in these areas and transforming their status into wage labour will be a step forward compared to unpaid family labourer status in terms of having them get some returns for their labour. A mixed vocational training programme seems meaningful in this regard.

Figures witnessing increasing employment in all service areas related to tourism, confirms the rationale for supporting the three sub-sectors suggested that is, health services tourism, elderly care and health tourism and alternative tourism (business, trade and fairs). Of course, training of health personnel is beyond vocational training that can be offered by İŞKUR. Nevertheless, especially in elderly care and health tourism, the İŞKUR can undertake the training of personnel to be engaged in elderly care services and this may offer significant job opportunities for women. Here, it is important to incorporate foreign language training into vocational training curricula. Another consideration could be: In case such retirement/care centres can not be launched in short term, what would be the chances of employment of people already trained in these areas? A solution could be to shift these people firstly to care centres which are being launched for elderly people who are nationals of Turkey.

General business services, as suggested, can be supportive services together with administrative services associated primarily with tourism. Examples include cleaning, landscaping and passenger transportation. Cleaning services are rendered by both men and women without any prior training. In transportation, driving is mostly closed to women since this job is coded by society as “male job.” Here, as much important as the delivery of training is ensuring that drivers are employed under decent conditions and for reasonable working hours so as to avoid traffic accidents as well. Of these three areas, it may be considered to launch training courses in landscaping and to ensure that female trainees take part equally with males in this training.

Then there are the sub-branches of manufacturing industry. It is of course possible to select some of them for training. However, given the male dominant nature of employment in manufacturing industry may deem the possibility of women benefitting from this training quite limited.

Trainings to be delivered should be quality indeed, capable of imparting skills needed by enterprises and with employment guarantee. In this context, while shaping training programmes in both form and content, it is quite important to solicit the opinion of employers and their representatives as well as those of vocational training specialists.

Major Features of the Economy of Antalya

When provinces of Turkey are ranked from top to down in terms of their level of socioeconomic development, Antalya was 10th in 2003.[1] Antalya is in the group called "provinces with secondary level of development" and services and agriculture are predominant sectors in employment. Agricultural productivity is high and agriculture-based industry is developed as well.[2] Parallel to developments whereby services sector gains space over gradually shrinking manufacturing industry as observed in countries developed at global scale, in Antalya too services is the leading sector as it is in tree metropolis of Turkey. The determining factor in the case of Antalya is tourism and associated sectors. The total tourism revenue of Antalya is significant to the extent to contribute to national economy as a whole.[3] In terms of education services, which are one of the indicators of socioeconomic development, Antalya enjoys a place higher than it has in overall ranking of provinces and it is above country averages in all indicators related to education. Antalya also has some health indicators which are above country averages.

Demographics

According to demographic indicators, the total population of Antalya province is 1,919,729 in 2009.[4] The rate of population growth in the province is with 32 in thousand above country's overall rate of population growth with 14.5 in thousand. This high rate of population growth can be attributed to migration inflows. In 2007-2008 as a city preferred by both job seekers and retired persons, Antalya takes the first place with the amount of net migration among the provinces. Net migration rate is with 19.7 in thousand the second highest.[5] The share of migrants in the 20-29 age group with 29 percent can be taken as an indicator of migration with the purpose of employment. Of the migrants aged 15 and over 45.3% are graduates of high school or equivalent and higher education. [6]

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1 DPT 2003, Study on the Socioeconomic Development Ranking of Provinces and Regions (2003), Publication No DPT 2671, p.56

2 DPT 2003, p.64

3 DPT 2003, p.111

4 TÜİK Statistical Yearbook 2009, p.41

5 TÜİK Statistical Yearbook 2009, p.65

6 www.tuik.gov.tr, ADNKS Population Census Results

Gross Domestic Product

Rather high rate of GDP growth and increasing share of Antalya in country's total GDP at both current and fixed prices have had its role in making Antalya a centre of gravity in internal migration. The national GDP share of Antalya which was 2.1% in 1987 increased to 2.6% at current prices and to 2.7% at fixed prices in 2001.[7]

Per capita GDP in Antalya is above the country average with 2,193$ in 2001. In the period 1995-2000, per capita investment with incentive certificate in Antalya was also quite above the average for the country as well as that for the group of highly developed provinces. The province also enjoys above average indicators in terms of rural infrastructure services and share in total public investments.[8]

Taking a look at the dynamics of such rapid development, changes in GDP shares of major sectors in the period 1997-2001 gives an idea about the respective growth of individual sectors.[9] Parallel to the overall trend in the country, in Antalya too the share of agriculture is in decline while that of trade is increasing. However, for the period that follows 2001, there are findings indicating that agricultural production is increasing in high value added goods and agriculture is gaining importance in the economy of the province.

Table 1: Development of Major Sector Shares in GDP by Years (%)

	1997		2001	
Sectors	**Fixed prices**	**Current prices**	**Fixed prices**	**Current prices**
Agriculture	19,0	19,0	18,7	12,3
Industry	8,0	5,6	7,3	6,5
Construction	11,0	10,2	5,9	5,6
Commerce	36,0	33,2	40,7	39,4
---Wholesale and retail trade	14,0	10,1	14,0	10,0
--Hotel, restaurant services	22,0	23,0	26,0	30,0
Transportation-Communication	16,0	17,3	16,1	19,1
Financial Institutions	1,0	2,2	1,1	1,3
Housing	4,0	2,4	3,9	3,8
Free lance professions-services	2,0	3,4	2,3	3,3

Source: ATSO 2008, s.15-17, TÜİK, www.tuik.gov.tr/ PreTabloArama.do

In the period 1997-2001, we observe decline by 6.7 percentage points in the GDP share of agriculture at current prices. This decline is smaller at fixed prices. The trade sector compensated this decline growing by 5-6 percentage points at both current and fixed prices. This growth in the trade sector can be attributed to its sub-sectors, hotel and restaurant services. This item grew by 4 points at fixed and by 7 points at current prices. There is a decline by 5

7 ATSO 2008, p.14

8 DPT 2003, p.64

9 Province-based GDP data by TÜİK belong most recently to the year 2001.

points at both current and fixed prices in construction sector. This situation can be explained by the economic crisis of 2001. In this period, the GDP share of industry, which was already quite limited, shrank a little at fixed prices while increasing at current prices and reaching 6.5%. The most significant trend that this table shows is that whether at current or fixed prices, the largest share in the GDP growth in the province belongs to the trading sector, more specifically to hotel and restaurant services and that this share tends to increase further. In other words, the vital artery of Antalya province is tourism sector. It is followed by agriculture while industry comes after these two sectors in a rather large distance.

Sectors

The UN Joint Programme report which evaluates provincial economy too draws attention to the existence of two development axes, defining the first as tourism and agriculture as natural resources, and the second as demand triggered by population growth. The clustering created by tourism becomes manifest in hotel, airport, transportation and support services, which in turn add to the importance of activities such as furniture, hotel textiles, food and beverages, cleaning, landscaping and private security services. The clustering in agriculture is associated with seed-seedling production, agriculture-based plastics and equipment and agricultural chemicals. Tied to demand created by population growth, there are developments in various activities including construction, education and health, followed by retail trade, construction materials, furniture and foodstuffs. [10]

Tourism

Turkey rapidly improved her position among tourist attracting countries, moving up from 16th in 2000 to 8th in 2008. This upward movement found reflection in tourism revenues as well and the country climbed from 14th to 9th in the world in terms of tourism revenues. Antalya has its significant share in this development. In the period 2000-2008, the number of tourists visiting more than doubled by increasing from 3,230.837 to 8,564,510. In 2008, 32.5% of all tourists visiting Turkey stayed in Antalya which has 349,857 certificated tourist beds.[11] Especially in 2007 and 2008, the number of tourists visiting Antalya increased at a higher rate than increase in the number of tourists coming to Turkey. This situation points out to enhanced attractiveness and capacity of the province for tourists.[12] Again in 2008, the motives of foreigners for visiting Antalya included excursion and entertainment by 58.5%, visits to friends and relatives by 11.1%, cultural motives by 6.4% and shopping by 4.8%. These are followed by commercial relations by 4.3% and formal gatherings by 2.9%. [13] There are views that Antalya is sufficiently promoted in terms of its tourism potential, but incoming tourists are mostly from lower income groups and desired contribution to local economy cannot be achieved as a result of “all inclusive system”.[14]

10 MDF-G UN Joint Programme 2010, Strategic Scan of Priority Sectors Workshop Report 100612, p.3-4

11 ATSO 2008, p. v, 43

12 ATSO 2008, p.47

13 ATSO 2008, p.50

14 MDF-G UN Joint Programme Stakeholder Interview Report July 2010, p.11

Agriculture

The fact that agriculture comes second in major economic activities is related to province's position of having a significant share in total fruit and vegetable produce of the country. In 2008, the province accounted for 13.4% of total vegetable output, 6.1% of total fruit output and 5.4% of total farming crops output of the country. Especially in greenhouse farming, the share of the province secularly increased and reached 59.3% of total greenhouse produce in the country in 2008. In Turkey, 74.3% of glass greenhouse and 51.9% of plastic greenhouse area is in Antalya.[15] Exports of agricultural goods increased rapidly from 180.6 million dollars to 406.8 million dollars in the period 2006-2008 while the share of Antalya in total agricultural exports of Turkey increasing from 5% to 10.4%.[16]

Culture of decorative plants is an emerging activity in Antalya. In the period 1998-2008, area under culture doubled in cut flower culture, increased by 2.5 times in indoor flowers and by 1.5 times in flower bulbs. There is a rapid increase especially in exports of flower bulbs: by 35% from 2006 to 2008. [17] Meanwhile, animal stock and animal products either remained stagnant or receded in the period 2006-2008. There is serious fall particularly in red meat and milk production. [18]

Industry

Industry as a sector ranks third in the list of major economic activities with a share in GDP as 7% at fixed prices. According to ATSO (Antalya Chamber of Industry and Commerce) records, there are 1,351 manufacturing firms in the province employing 29,749 persons. The distribution of firms by their economic activities shows that the highest number of firms gathers in food production, packing and storing with 495. It is followed by metal processing firms (107), plastic industry firms (94), textiles (87) and woodworks and furniture (83). Looking at the employment capacity of firms with capacity report from the ATSO, we observe that the largest share belongs to textiles which employ 6,509 persons. Then comes food industry (6,483 employees) and construction materials (2,270). After metal products and plastic industry, woodworks and furniture come 6th with 1,602 persons employed. [19] Hence the textiles sub-sector has a marked share in total employment in manufacturing industry. However, looking at SGK (Social Security Institution) data, we see a different picture in terms of the distribution of employees over years. This point will be addressed below.

In Antalya organized industrial zone there are 130 active enterprises employing 9,200 persons. These enterprises mainly produce construction materials, foodstuffs, equipment for tourism facilities, agricultural inputs and greenhouse materials. Construction materials and food

15 ATSO 2008, p.vi-vii

16 ATSO 2008, p.18

17 ATSO 2008, p.58

18 ATSO 2008, p.21

19 There is large difference between manufacturing firms registered to industrial log and firms granted capacity report by the ATSO in terms of numbers and people employed. The number of firms registered with industrial log is 734 in 2008 and their total employment is 21,806. The number of firms is much lower with the exception of woodworks-furniture branch where there are 147 firms. Therefore evaluation is based on ATSO registries. 2008, p.26, 29

appear as dominant engagements in these enterprises. In Antalya Free Trade Zone there are 162 active firms and 61 of these are engaged in production. In this zone, medical equipment and yatch production are two important areas of economic activity.[20] In small industrial sites there are 5,732 enterprises employing 24,068 persons (2008). In these sites, the leading activity is auto repair followed by furniture, cold iron and carpentry.[21]

Construction

Construction is another important economic activity in the province. This activity comprises the construction of residential houses and apartment buildings as well as hotels, offices and commercial buildings. Immediately after the economic crisis of 2001, there was a serious drawback in this sector. Recovery started after 2005; yet, the number of completed buildings has yet not reached the level attained in 2000.[22]

Exports

Returns to exports from Antalya in the period 2004-2009 tend to rise in spite of some ups and downs. The total exports amounting to 457.8 million dollars in 2004 reached 655.4 million dollars in 2009.[23] Exports in 2008 totalled to 724.5 million dollars. The breakdown of total exports from Antalya is as follows: processed fruits and vegetables (358.8 million dollars), textiles and garments (103.5 million dollars- textiles 76.8 million dollars and garments 26.7 million dollars) and flowers (43.4 million dollars).[24]

Investments

For a long time now, Antalya is the second province after İstanbul in terms of investments made by foreign capital. In the period 1954-2008, there were 21,079 foreign companies investing in Turkey, of which 11,533 invested in İstanbul and 2,725 in Antalya. The number of foreign companies active in Antalya started increasing after 2003 and the number of such firms which was 408 in 2003 increased to 2,725 in 2008. As for activities of these companies, the leading one is real property leasing with 676 companies, construction with 574 companies, hotels and restaurants with 487 companies and wholesale and retail trade with 349 companies. There are 161 foreign companies active in manufacturing industry.[25]

Public investments in Antalya increased over years and total investment allocations at current prices jumped from 151.9 million liras in 2000 to 979.8 million liras in 2008. In the period 2004-2008 the sectors of transportation and communication had the largest share in total public investment, accounting for 33.5% in 2008. The education sector, though second, lags far behind with a share of 8.7%. It is followed by agriculture (8%) and energy (5.9%).[26] Looking at the sector wise distribution of investment incentives, that is investments supported by the

20 ATSO 2008, p.ix

21 ATSO 2008, p.27

22 ATSO 2008, p.30

23 TÜİK, Foreign Trade Statistics, Exports by Provinces, www.tuik.gov.tr

24 ATSO 2008, p.58-59

25 ATSO 2008, p.70

26 ATSO 2008, p.78

public sector, we see services was the dominant sector in the period 2006-2008, suggesting that investment incentives created employment mostly in this sector. Manufacturing industry and energy are other sectors which enjoy significant incentives. [27]

Interviews with company managers and project stakeholders as well as the workshop conducted under the UN Joint Programme field study suggest that in spite of some macro-level factors which affect Antalya's business capacity negatively, the province is still well positioned in terms of its production and market advantages, well-established clusters in agriculture and tourism, modern boarding facilities and application of advanced agricultural technologies. The province is considered attractive for living and working with its level of socioeconomic development and life quality it offers. [28] In general, business circles in Antalya are content with opportunities present in the province and hopeful for the future.

Major Characteristics of Labour Market in Antalya

The major source to be used is assessing the underlying characteristics of labour supply and the structure of employment is TÜİK's Household Labour Force Surveys. However, in this source data is not disaggregated for Antalya and thus it encompasses the provinces of Burdur and Isparta as well in line with the NUTS2-TR61 categorization. While Antalya is the 10th in the socioeconomic development ranking of provinces, Isparta and Burdur, in the same sub-region are 28th and 31st, respectively. [29] The GDP of Antalya at current prices is 5 times that of Isparta and 8 times that of Burdur. At current prices, per capita GDP was 2,193 $ in Antalya, 1,951 $ in Burdur and 1,510 $ in Isparta in 2001.[30] Thus, when evaluating TÜİK-HHLF data for Antalya, this effect of deviation must be considered.

Before giving information on the labour force it will be useful to give some data on the demographic structure and migration in the region. As Antalya is the main target of migration we can assume that regional data on migration reflects mainly the situation in the Antalya province. In the region working age population of 15-64 years amounts to 1.684.730, of which 853.078 are males and 831.078 are females in 2009. 43.9% of males and 41.8 %of females have been born outside the region and migrated to the provinces in the region in a certain period of their lives. The share of those born outside the province is the lowest among the 15-19 age group. This situation can be interpreted as a sign of the slowing down of the migration since the mid 90ies. According to age groups the share of those born outside province is the highest with 50.7% in the 20-24 age group among males. It shows that coming to the province with the aim of finding a job is most widespread among young men. The share of migrants decreases by higher age cohorts. Among women the share of migrants is the highest with 49.7% among the 25-29 age group.

In the Antalya province the level of education among the age group 15-64 shows that where as 15.7% of women have no diploma, 45.8% are primary school graduates. While 15%

27 ATSO 2008, p.79

28 MDF-G UN Joint Programme Stakeholder Interview Report, July 2010, p.11

29 DPT 2003, p.107

30 ATSO 2008, p.14-15

are junior high and 15.5% are high school and equivalent vocational school graduates, women with higher education amount to 8%. The share of those without diploma increases rapidly among women over 35 and the ones without diploma or with only primary school graduation reaches to 91% in the age group 55-64. On the other hand the share of high school and equivalent vocational school graduates with 36.3% and higher education graduates with 13.6% is the highest in the age group 20-24 compared to other age groups.

Table 2: Women by educational status and wider age intervals 2009 (000, Age 15 +)*

	Without diploma	Primary school	Junior high school	High school	Vocational high school	Higher education	Total
15-19	5608	0	66802	9309	1913	0	83632
%	6.7	0	79.9	11.1	2.3	0	100.0
20-24	6230	13670	20075	19141	9984	11108	80208
%	7.8	17.0	25.0	23.9	12.4	13.8	100.0
25-34	14946	103482	18485	25332	22470	28845	213560
%	7.0	48.5	8.7	11.9	10.5	13.5	100.0
35-54	55738	221040	16673	22008	15987	22545	353991
%	15.7	62.4	4.7	6.2	4.5	6.4	100.0
55-64	47517	43465	2596	1772	1387	3524	100261
%	47.4	43.4	2.6	1.8	1.4	3.5	100.0
Total	130039	381657	124631	77562	51741	66022	831652
%	15.6	45.9	15.0	9.3	6.2	7.9	100.0

*Figures may not add up to total for rounding.

Source: Estimations of Hakan Ercan from TÜİK HHLFS microdata

Table 3: Men by educational status and wider age intervals 2009 (000, Age 15 +)*

	Without diploma	Primary school	Junior high school	High school	Vocational high school	Higher education	Total
15-19	4051	0	84823	10888	6797	190	106749
%	3.8	0	79.5	10.2	6.4	0.2	100.0
20-24	1747	4687	18687	22862	11674	12264	71921
%	2.4	6.5	26.0	31.8	16.2	17.1	100.0
25-34	1966	82505	35228	33696	31056	32352	217103
%	0.9	38.0	16.2	15.5	14.3	14.9	100.0
35-54	11405	195927	50429	31089	23480	46541	359231
%	3.2	54.5	14.0	8.7	6.5	13.0	100.0
55-64	10118	65700	8025	3816	3386	6939	98074
%	10.3	70.0	8.2	3.9	3.5	7.1	100.0
Total	29587	348819	197192	102351	76753	98376	853078
%	3.5	40.9	23.1	12.0	9.0	11.5	100.0

*Figures may not add up to total for rounding.

Source: Estimations of Hakan Ercan from TÜİK HHLFS microdata

Distribution by educational status among region's male population is as follows: 3.4% for without diploma, 41% for primary school, 23.1% for junior high school, 21% for high school or equivalent vocational school and 11.5% for higher education graduates. In the age group 20-24 the share of high school or equivalent vocational school graduates with 48.6% and higher education graduates with 16.7% is the greatest. Compared with men, the share of women without diploma is much more widespread and those with education concentrate among the primary school graduates. In all age groups and at all educational levels there is a gender gap after primary school.

Information on Labour Force

Table 4: Population and Labour Force (000 persons)*

TOTAL	2004			2009		
	Total	**Male**	**Female**	**Total**	**Male**	**Female**
Non-institutional civilian population	2206	1103	1103	2455	1238	1216
Population at age 15+	1669	819	850	1877	938	939
Labour force	859	593	266	1048	707	341
Employed	799	554	246	928	631	296
Unemployed	60	39	21	120	75	44
Labour force participation rate	51.5	72.4	31.3	55.8	75.3	36.3
Unemployment rate	7.0	6.6	7.8	11.4	10.7	13.0
Employment rate	47.9	67,7	28.9	49.4	67.3	31.6
Population out of labour force	810	226	584	829	231	598

* Figures may not add up to total for rounding.

Source: www.tuik.gov.tr Labour Force Statistics, (accessed: 10.9.2010)

In the period 2004-2009 labour force in Antalya, Burdur and Isparta increased by 189,000, of which 129,000 are employed and the remaining 60,000 are unemployed. Increase in population not participating to labour force was limited to 19,000. The labour force participation rate which was 51.5% in 2004 increased to 55.8% in 2009, thus climbing over the average rate for the country which was 47.9%. For males, the labour force participation rate in the region is about five percentage points above the national average (75.3% and 70.5%, respectively). As for females, their labour force participation in the region (36.3%) is 10 points above the country average (26%). Hence, it is basically the female participation to labour force that brings the average in the region over and above the country average. In fact, the share of females in regional labour force (32.5%) is also higher than the share of females in country's total labour force (27.8%). This situation which also holds true for rates of employment is associated with the services and agriculture-based employment structure in the region as will be discussed below.

Table 5: Labour force by educational status and wider age intervals 2009 (000, Age 15 +)*

	Under high school		High school or equivalent vocational school		Higher education				
	Male	Female	Male	Female	Male	Female	Total Male	Total Female	Total Labour Force
15-19	36	13	9	4	0		45	18	63
20-24	24	15	25	14	10	8	59	37	96
25-34	114	53	63	25	30	23	207	101	308
35-54	230	117	49	15	43	14	322	147	468
55+	68	37	3	0	4	1	74	38	112
Total	470	236	149	58	87	47	707	341	1048
	707		207		134				

* Figures may not add up to total for rounding.

Source: TÜİK, Labour Force Statistics Database, www.tuik.gov.tr

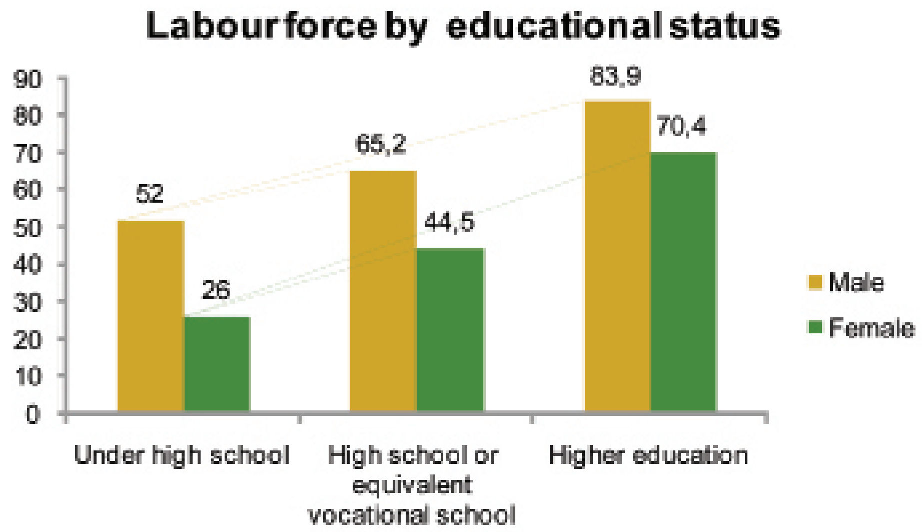
In 2009, age distribution of labour force in the region is as follows: 15-19 (6%); 20-24 (9.2%), 25-34 (29.4%), 35-54 (44.6%) and 55 + (10.7%). The share of youth in labour force adds up to 15.2%. The distribution of labour force by educational background: Illiterates (3.1%), under high school (64.3%), high school and equivalent vocational schools (19.7%) and higher education (12.8%). In male labour force, the share of under high school is 65.6%, high school and equivalent vocational schools 21% and higher education is 12.3%. Corresponding figures for female labour force are 61.6%, 17% and 13.8%, respectively.

Two-thirds of total labour force in the region has educational background under high school, indicating the low educational status of labour force. Of youth in the age group 15-24, 54.7% are under high school and 32.7% have graduated from high school or equivalent vocational school. Although the share of youth with educational status under high school is 10 points smaller than in general labour force, it is an alarming indicator that more than half of youth in labour force have no high school diploma.

When women's educational level in the region is compared with the educational level of the female work force in the region, it can be observed that the latter is higher than the former. Whereas 77% of the female population has education less than high school, it is 69.2% by the work force. High school and equivalent vocational school graduates amount to 15.5% in the population and 17% in the work force. These rates are 7.9% and 13.8% for women with higher education respectively. They all show once again the positive relation among education and employment.

On the other side comparison of the male population's educational level in the region with the educational level of the workforce in the region shows similarity. People with educational background under high school amounts to 66.5% in the labour force and 67.5% in the population. The share of high school and equivalent vocational school graduates with 21% is the same in both groups. Those with higher education amount to 12.3% in the work force and 11.5% in the population.

Labour force participation rates of youth in the age group 15-24 by educational status are as follows in 2009: 39.8% for illiterates, 39.2% for under high school, 56.2% for high school and equivalent vocational school graduates and 77.5% for other with higher education. While the positive correlation between higher levels of education and higher rates of labour force participation is true for both males and females, it is more salient when young women are concerned. Labour force participation rate is 52% for young males with education under high school while 26% for young women; 65.2% for young males with high school or equivalent vocational school diploma while 44.5% for young women and 83.9% for young higher education graduate males while 70.4% for young women of same educational status. Thus at each successive level of education, labour force participation increases faster among females than among males.



Employment in the Region.

Table 6: Distribution of Employment by Branches of Economic Activity (000, Age 15+) □

	2004			2009		
	Total	**Male**	**Female**	**Total**	**Male**	**Female**
Total	799	554	246	928	631	296
Agriculture	242	119	122	315	166	149
Percentage	30.2	21.5	49.8	33.9	26.3	50.2
Industry□□	129	104	26	129	105	24
Percentage	16.1	18.7	10.4	13.9	16.6	8.1
Commerce	204	162	42	255	199	56
Percentage	25.5	29.2	17.0	27.5	31.6	18.8
Services	225	169	56	229	161	68
Percentage	28.2	30.5	22.8	24.7	25.5	22.9

* Figures may not add up to total for rounding.

□□ Construction is included in industry.

Source: www.tüik.gov.tr Labour Force Statistics, (accessed: 10.9.2010)

In the period 2004-2009 total employment in the region increased by 129,000, from 799,000 to 928,000. 77,000 of these incremental employees were males and 50,000 were females. Due to the weight of tourism, more than half (52.2%) of total employment in 2009 was in trade and services, followed by agriculture (33.9%) and industry (13.9%). Over the year 2004, while the share of industry dropped by 2 percentage points, there was about 4 points increase in the share of agriculture. Women's share in agricultural employment remained the same around 50%, there was 5 points increase in males' share. Consequently, in 2009, services and commerce occupies the first place in male employment with 57.1%, followed by agriculture (26.3%) and industry (16.6%). As for females, agriculture takes the first place with 50.2%, followed by services and trade (41.7%) and industry (8.1%). Of increase by 77,000 in male employment, 47,000 are in agriculture and 37,000 are in trade. There is decrease in employment in the services sector by 8,000. Of increase by 50,000 in female employment, 27,000 are in agriculture and 12,000 are in trade. The decrease in employment in industry is by 2,000.

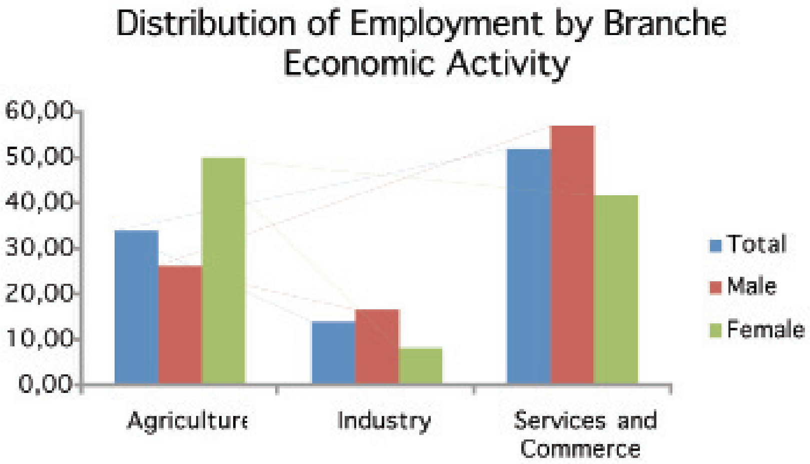


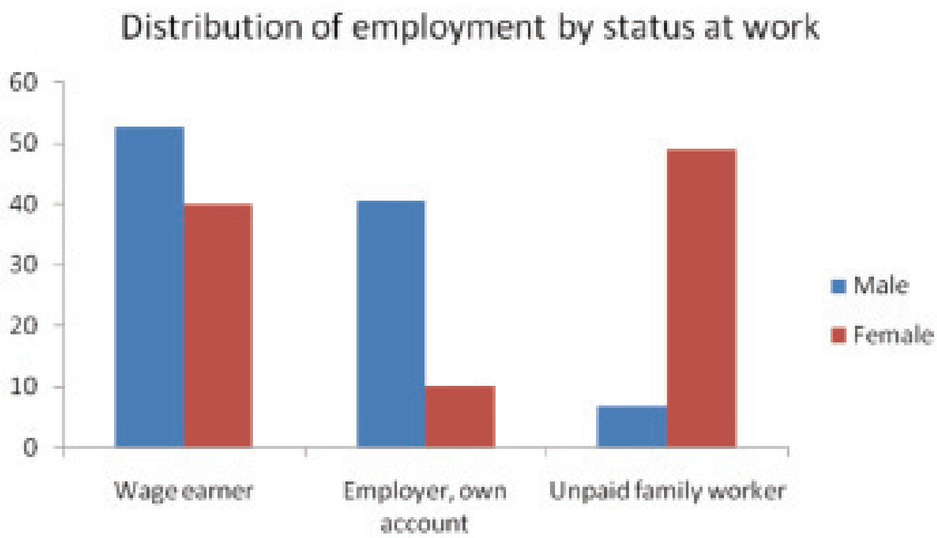
Table 7: Distribution of employment by status at work (000, Age 15+)

	2004			2009		
	Total	Male	Female	Total	Male	Female
Wage earner	405	302	104	453	332	121
Employer, own account	248	220	28	287	256	30
Unpaid family worker	146	33	114	188	43	145
Total	799	554	246	928	631	296
Agriculture						
Wage earner	14	7	8	20	11	9
Employer, own account	107	91	16	135	126	9
Unpaid family worker	146	21	99	160	29	131
Total	242	119	122	315	166	149
Non-agricultural						
Wage earner	391	295	96	433	320	112
Employer, own account	141	129	12	152	131	21
Unpaid family worker	146	11	15	28	14	14
Total	558	435	123	613	465	148

* Figures may not add up to total for rounding.

Source: www.tüik.gov.tr Labour Force Statistics, (accessed: 10.9.2010)

In 2004 there were 799,000 people employed; 50.7% of this total worked for monthly or daily wage, 31% were either employers or self-employed and 18.3% were unpaid family labourers. For males in employment, these figures are 54.5%, 39.7% and 5.9% and for females 42.3 %, 11.4% and 46.3%, respectively. While for males, wage earners constitute more than half of all in employment, unpaid family labour is the dominant form of employment among females. In 2009, it is observed that the share of wage earners in total employment dropped by about 2 points for both males and females while the share of unpaid family labourers increased. This situation can be attributed to the lingering effects of the 2008 economic crisis in 2009. In 2009, 52.6% of males are wage earners, 40.6% are employers or self-employed and 6.8% is unpaid family workers. For females, figures are 40.9%, 10.1% and 49.0%, respectively.



In agriculture (2004), 76.4% of males are employers and self-employed while 81.1% of females are unpaid family labourers. In 2009, while the situation of males remained more or less the same (75.9%) there is an increase in females' status as unpaid family labourers (87.9%). In conformity with the overall pattern in Turkey, women's labour has no returns to it. In non-agricultural employment (2004), 67.8% of males and 78% of females are wage earners; 29.7% of males and 9.7% of females are employers and self-employed; and 2.6% of males and 12.2% of females are unpaid family workers. Coming to 2009, while percentages have only slightly changed for males, there is a decrease in females in the status of unpaid family workers (9.4%) and an increase in female self-employment (14.2%). However, since agriculture accounts for half of all female employment, there could emerge an increase in the share of unpaid family labourer in overall distribution.

Table 8: People in Employment by Educational Status and Branches of Economic Activity -2009 (000, Age 15 +)*

	Illiterate			Under high school			High school or equivalent vocational school			Higher education			Total		
	T	**E**	**K**	**T**	**E**	**K**	**T**	**E**	**K**	**T**	**E**	**K**	**T**	**E**	**K**
Agriculture	26	3	23	259	139	119	24	17	6	5	5	0	314	165	149
Industry	2	1	1	100	83	16	21	16	5	9	6	2	131	107	25
Commerce	2	1	1	149	118	31	69	53	15	25	18	7	245	191	54
Services	1	0	1	98	74	23	59	45	15	79	49	30	237	168	69
Total	32	5	26	605	415	190	173	132	42	118	79	39	928	631	296

* Figures may not add up to total for rounding.

Source: www.tüik.gov.tr Labour Force Statistics, (accessed: 10.9.2010)

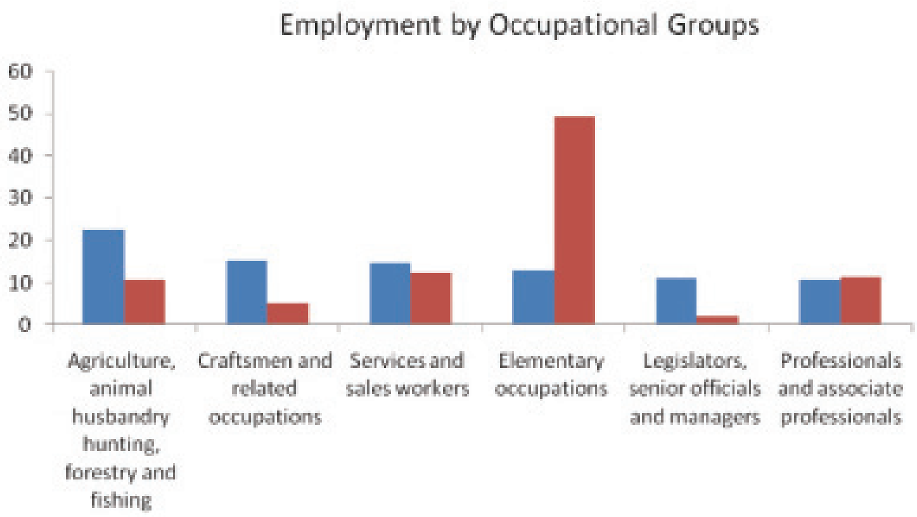
The illiterate population in employment is mainly women working in agriculture. 82.5% of all employed in agriculture have their educational status under high school. 76.3% of people employed in industry are in the same status. Of those employed in trade, 60.8% are under high school, 28.1% are high school or equivalent vocational school graduates and 10.2% have higher education. In services, 41.3% are under high school, 24.9% are high school or equivalent vocational school graduates and 33.3% have higher education. Thus in all sectors with the exception of services majority of people in employment have educational status under high school.

Table 9: Employment by Occupational Groups (ISCO 88) -2009 (000, Age 15+)

	Total	%	Male	%	Female	%
Legislators, senior officials and managers	77	8.3	71	11.2	6	2.0
Professionals	44	4.7	26	4.1	18	6.1
Technicians and associate professionals	57	6.1	41	6.5	16	5.4
Office and customer services clerks	49	5.3	26	4.1	23	7.8
Services and sales workers	130	14.0	93	14.7	37	12.5
Agriculture, animal husbandry hunting, forestry and fishing	173	18.6	142	22.5	31	10.5
Craftsmen and related occupations	111	12.0	96	15.2	15	5.1
Plant and machine operators and assemblers	59	6.4	55	8.7	4	1.3
Elementary occupations	228	24.6	82	13.0	146	49.3
Total	928	100.0	631	100.0	296	100.0

Source: www.tüik.gov.tr Labour Force Statistics Database, (accessed: 14.9.2010)

Looking at the distribution of male employment by occupation groups, the largest share is agriculture, animal husbandry, hunting, forestry and water products with 22.5%. It is followed by qualified crafts with 15.2%, services and sales workers with 14.7%, unqualified jobs with 13%, and legislators, senior officials and managers with 11.2%. As for women, unqualified jobs lead the list with 49.3%, followed by service and sales with 12.5% and agriculture, animal husbandry, hunting, forestry and water products with 10.5%. While only 35.5% of males are employed in unqualified jobs and agriculture, having this rate as high as 60% among females indicates that working in unqualified jobs is a problem more acute for women.



Looking at the distribution of employed population by their coverage by any social security scheme, we observe that 46% are informally employed without any social security coverage. This is higher than the country average for the rate of informal employment which is 43.8% in 2009. The rate of informal employment is 76.8% in agriculture, 38.7% in industry and 21.8% in services.

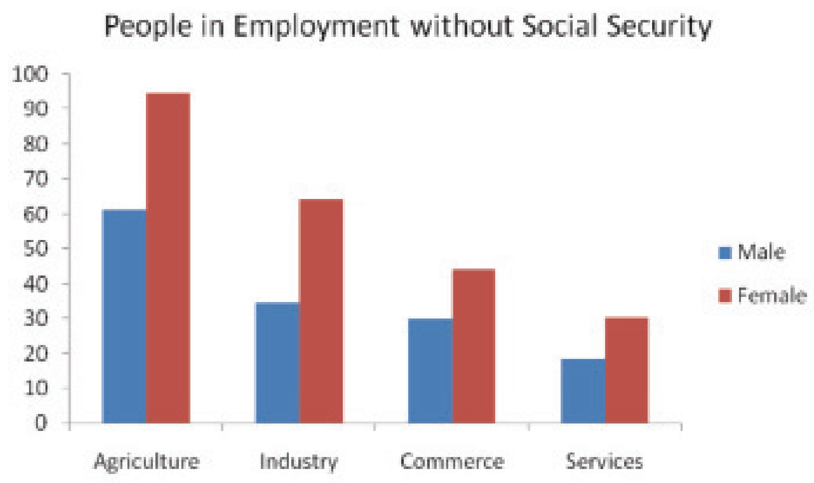
Table 10: People in Employment by Registry with Social Security Institution and Branches of Economic activity 2009 (000, Age 15+) *

	Not registered			Registered				Not registered %	Registered %
	T	M	F	T	M	F	Total		
Agriculture	241	101	141	72	64	8	315	76.8	23.2
Industry	52	37	16	79	70	9	129	38.7	61.2
Commerce	81	57	24	164	134	30	255	33.7	66.3
Services	53	31	21	185	137	48	229	21.8	78.2
Total	427	226	202	500	406	95	928	46.0	54.0

* Figures may not add up to total for rounding.

Source: www.tüik.gov.tr Labour Force Statistics Database, (accessed: 10.9.2010)

The rate of informal employment is 35.8% for males and 68.2% for females. In agriculture, 61.2% of males 94.6% of females, in industry 34.6% of males and 64% of females, in trade 29.8% of males and 44% of females and finally in services 18.4% of males and 30.4% of females are employed informally without any social security coverage. In all sectors, informal employment of females is much more common than males.



Distribution of Employment in the Region according to Sectors and Sex

It is a handicap for this study that TÜİK Household Labour Force Surveys give no disaggregated data for Antalya province and thus makes in compulsory to make assessment on the basis of an aggregate including the provinces of Burdur and Isparta as well. It is also a handicap that information is provided over four major branches of economic activity, thus lacking data on specific sub-branches. To pass over this handicap the special tables prepared from TÜİK data on employment according to economic branches of activity and occupation can be used. In 2009 the total number of employed amounts to 894.260 of which 608.442 are males (68%) and 285.818 are females (32%).

Table 11:Distribution of Employment by Branches of Economic Activity -2009

Branches of Economic Activity*	Male	Female	Total
Agiculture, hunting, related activities	143	139	282
Forestry, logging, related activities	3	0	3
Manuf. of food products, beverages	7	3	10
Manuf. of textiles and wearing apparel, fur	5	16	21
Manuf. of metal products, machinery & equipment	8	0	8
Manuf. of chemicals and chemical products	5	1	6
Manuf. of furniture	7	0	7
Manuf. of non-metalic products	11	0	11
Other industry branches	9	2	11
Construction	47	1	48
Sale, maintenance, repair of motor vehicles	19	0	19
Wholesale trade, commission trade	24	5	29
Retail trade, repair of personal, hh goods	82	31	113
Hotels and restaurants	73	18	91
Land, water, air transport, transport via pipelines	26	2	28
Auxilliary transport activities	7	2	9
Post and telecommunication	6	1	7
Financial intermediation, insurance and auxilliary activities	5	2	7
Real estate activities	5	1	6
Other business activities	27	10	37
Public administration, defense, compulsory social security	32	6	38
Education	19	15	34
Health and social work	8	10	18
Recreation,cultural,sporting activities	6	2	8
Other service activities	11	5	16
Private hh with employed persons	0	11	11
Other activities	29	16	45
Total	631	296	928

*The branches of economic activity with limited number of workers are aggregated under other activities.

Source: Estimations of Hakan Ercan from TÜİK HHLFS microdata

According to the table 22.7% of men are in agricultural and related activities. The share of wholesale and retail trade is 19.8% and hotels and restaurants is 11.6%. The share of manufacturing industry is 8.2% in male employment followed by construction with 7.5%.

Agriculture has a share of 47.0% by women. In the second place comes retail trade in female employment. The share of wholesale and retail trade amounts to 12.2%, and hotels and restaurants to 6.1%. The share of manufacturing industry is 7.4%. Surely the sectors of public administration, defence, compulsory security, education, health and social work are important areas of employment for both sexes, mainly performed as public employees. 9.4% of men and 10.5% of women are working in these sectors. In the regional employment agriculture is an important sector. Information on Antalya province show us that trade and hotels and restaurants are the leading sectors.

İŞKUR Antalya Province Labour Market Survey

Another source of information about the composition of non-agricultural employment in Antalya is the Antalya Province Labour Market Survey conducted by the İŞKUR from April 17th to May 30th 2009. According to the final report of this survey, 13,982 enterprises filling out and returning the questionnaire through the internet employ 176,173 persons in total. Of these persons, 131,712 (74.8%) are males and 44,461 (25.2%) are females. Of responding firms, 69.2% are active in services sector, 15.6% in industry, 12.4% in construction and 2.8% in agriculture.

The number of people working in enterprises to which the İŞKUR questionnaire was applied constitutes 56.6% of total number of people in formal employment. This makes the survey an important source of information. From this source it is possible to obtain information about the gender distribution of employment.[31] According to this information the ranking of sectors in terms of the number of males formally employed is as follows: hotels and restaurants (44,250-33.6%), wholesale and retail trade (15,296-11.6%), construction (14,379-10.9%), other social, community and personal services (13,960-10.6%), transportation, warehousing and communication (7,942-6%), public administration, defence and compulsory social security (4,361-3.3%). Employment in all services sector activities amounts to 94,585 and its share in total male employment is 71.8%. Total employment in industry is 20,141 and its share in total employment is 15.3%. The share of construction is 10.9% as mentioned before and total employment in agriculture is 2, 519 with a share of 1.9% in total.

Sectors in which formal female employment is significant is as follows from in descending order: hotels and restaurants (12,592-28.3%), wholesale and retail trade (5,997-13.5%), other social, community and personal services (5,706-12.8%), health and social services (2,893-6.5%), transportation, warehousing and communication (2,153-4.8%) and financial and intermediary institutions (2,129-4.8%). Employment in all services sector activities amounts to 35,521 and its share in total female employment is 79.9%. As far as manufacturing industry is concerned, there are 1,408 females working in textiles and textile products (3.2%) and 1,066 (2.4%) in food, beverage and tobacco production. Total industrial employment including construction is 7,377 (16.6%) and agricultural employment is 1,519 (3.4%)

Enterprises employing 10 or more workers have a share of 85% in total employment. Of these enterprises 36.9% are hotels and restaurants. In enterprises employing 9 or fewer workers, wholesale and retail trade has the largest share with 21.3%.

The leading occupations of those in employment include tourism and hotel services, physical labour (in general), sales and tourism and hotel management. For both males and females, the leading occupation is tourism and hotel services.[32]

TÜİK Antalya Labour Market Survey

TÜİK has conducted a labour market survey to analyse the labour demand during 25 September-25 December 2010. According to the results the share of various sectors in

31 İŞKUR 2009, s.3-4

32 İŞKUR 2009:8

employment are as follows: 26.6% hotels and restaurants, 16.6% retail trade (without motor vehicles), 8.5% land transport and transport via pipelines, 7.6% wholesale trade (without motor vehicles) and 7.1% construction. These five sectors' share amount to 66% of total employment. In the last one year 50% of all recruitments are in hotel and restaurant and construction sectors with the remaining 50% in 19 different sectors. Accordingly 56% of all the dismissals in the last year are in hotel-restaurant, construction and retail trade sectors. This situation is related with the seasonal and temporary nature of employment in these sectors.[33]

Employment Covered with Social Security in Antalya

In keeping track of developments in labour market, one way of overcoming these gaps could be looking at the number of formal workers by branches. Reserving for the prevalence of informal employment which denies the possibility of taking this as a definitive indicator, increase in the number of formally employed persons will at least give us some idea about sectors in which employment is growing. In Antalya, the number of formally employed people increased by 45% in the period 2004-2009, from 214,553 to 311,082. In the same period, the number of formally employed population in Turkey increased by 44.7%, rising from 6,663,328 to 9,642,769. It appears that the capacity of creating formal employment is the same for the country in general and Antalya province in particular.

Table 12: Distribution by years of people working in different economic branches with social security

Branch Code	Branch	2004	2009
5	Crop and animal farming	2814	4792
6	Forestry, logging	1605	2091
11	Other mining and quarry activities	1214	1727
13	Foodstuffs	4349	6847
16	Textile products	3141	1907
17	Garments production	2664	1371
19	Forestry, wood and mushroom production	1528	1796
21	Printing and multiplication of registered media	686	1103
23	Chemicals and chemical products	1095	1235
25	Rubber and plastic products	348	1162
26	Other non-metal	2496	3314
28	Fabricated metal products except machinery and equipment	2840	4693
30	Electrical appliances	893	1234
34	Furniture	514	1143
35	Other manufactures	2596	2472
36	Assembly and fixing of machinery and equipment	2952	3623
42	Building construction	39456	32791
43	Construction other than buildings	5944	7657
44	Special construction activities	5830	10001
45	Wholesale and retail trade: motor vehicles, repair and maintenance	1229	2155
46	Wholesale trade: except motor vehicles	8211	12077
47	Retail trade: except motor vehicles	17987	30731

33 Abdi Öncel, Antalya Labour Market Survey, 2010 Pilot Implementation Summary Indicators, PPP, 25.1.2010

48	Land transportation and pipeline	5557	12081
51	Warehousing and supportive activities in transportation	3361	5310
53	Boarding	18902	29185
54	Food and beverages	1011	4606
61	Finance services except insurance and retirement funds	1247	2054
62	Insurance, reassurance and retirement funds except for compulsory social security	636	1170
65	Law and accounting	691	1887
66	Administrative centre activities	14616	19136
67	Architecture and engineering activities	942	1589
71	Veterinary services	1781	3478
72	Rental and leasing activities	877	2448
73	Travel agencies, tour operators, etc.	1341	3195
74	Security and investigation activities	866	5989
75	Building and landscape activities	21433	28235
76	Office management and support activities	11	2389
78	Education	4754	12993
79	Human health services	1618	5598
84	Gambling and lottery	5315	6164
87	Repair of computers and personal household appliances	1906	3155
88	Other services	5340	7897
	Sum Total	214553	311082

Source: SGK- Social Security Institution Statistical Yearbooks

Increase in agricultural employment manifests itself as increase in the number of formally employed in crop and animal farming from 2,814 to 4,792. We can see this increase as related to increase in export-oriented fruit and vegetable production. Formal employment in textiles and garments which are sub-branches of manufacturing industry significantly shrank in this period, from 5,805 to 3,278. However in Table 11 the number of people working in the manufacturing of textiles and apparel amounts to 20.293. Taking in account that majority of people working in industry are waged workers the big gap among these numbers can be interpreted as a sign for the prevalence of unregistered work. The number of formally employed persons in food processing increased from 4,349 to 6,847. This figure is also less than the number of 9.705 in Table 11. Other manufacturing industry branches where there has been increase in the number of formally employed persons include rubber and plastics, different sub-branches of metal processing, manufacture of non-metal items and furniture. However the same gap problem exists in all these branches.

Employment in the construction sector which was 51,230 in 2004 remained almost the same with 50,449 in 2009. This makes up 16% of total formal employment. However, there are differences between sub-branches of construction sector. In building construction branch where most of formal employment takes place there is a fluctuating trend over years and the number of working people here dropped in 2009 relative to 2004. On the other hand, despite their fewer numbers, the number of persons employed in the construction of structures other than buildings and in special construction activities is regularly rising.

There are significant increases in the number of persons working in various sub-branches of services sector and the number of formally employed people has reached a considerably large size particularly in trade and boarding. With the exception of motor vehicles and few others, employment in this period grew by 47% in wholesale and by 71% in retail trade. Employment in tourist boarding facilities and services increased by 54%. Land transportation and food/beverage services are also among branches where there is increase in employment and all are tied to the tourism sector. Parallel to increase in the number of tourists there is employment growth in all service domains related to tourism. Finally, there are also significant increases in employment in administrative services, education and health branches of the services sector.

Unemployment

There are 60,000 unemployed persons in Antalya, Isparta and Burdur constituting the TR61 region in 2004 and the rate of unemployment is 7%. In 2009, however, the number of unemployed increased to 120,000 and the rate of unemployment to 11.4%. The latter is below the rate of unemployment in the country which is 14%. Of 120,000 unemployed, 75,000 are males and 44,000 are females. The rate of unemployment is 10.7% for males and 13% for females. The share of females in total unemployed people is 36.7%, which is higher than their share in total labour force (32.5%).

Table 13: Rates of Unemployment by Age Groups (%)

	2004			2009		
Age Group	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**
15-19	16.7	16.2	17.4	19.3	21.6	13.7
20-24	16.9	15.9	18.6	24.5	22.9	27.1
25-34	8.0	7.2	9.9	12.3	9.4	18.3
35-54	4.0	4.1	3.7	8.6	8.5	8.7
55+	1.5	1.9	0.6	5.3	7.1	1.6

Source: www.tüik.gov.tr Labour Force Statistics Database (accessed: 25.01.2011)

From 2004 to 2009 unemployment increased in all age groups. The rates of unemployment which were 16.7% in the age group 15-19 and 16.9% in the age group 20-24 in 2004 increased to 19.3% and 24.5%, respectively, in 2009. In 2009, the rate of unemployment is 22.9% among males in the age group 20-24 and 27.1% among females in the same age group. The rate of unemployment among females in the age group 25-34 is 18.3%, which is almost the double of the rate among males (9.4%), drawing attention to tendency of rising unemployment among middle-aged women. In 2009, the rates of unemployment for the age groups 15-19 and 20-24 are 23.6% and 26.3%, respectively, for the country. Both figures are higher than the rates in the region for the same age groups.

Table 14: Rates of Unemployment by Educational Status (%)

	2004			2009		
	Total	Male	Female	Total	Male	Female
Illiterate	1.2	9.7	0	3.0	13.2	0.6
Under high school	5.8	5.8	5.6	10.2	10.5	9.5
High school or equivalent vocational school	11.1	9.3	17.1	16.3	11.6	28.4
Higher education	7.6	5.4	11.9	12.1	9.5	16.8

Source: www.tüik.gov.tr Labour Force Statistics Database (accessed: 25.01.2011)

From 2004 to 2009, the rates of unemployment corresponding to specific levels of educational status have increased for both males and females. The rate of unemployment increased from 5.8% to 10.2% among people under high school, from 11.1% to 16.3% among high school and equivalent vocational school graduates and from 7.6% to 12.1% among university graduates. The most striking increase, however, is for females having high school or equivalent vocational school diplomas, which is from 17.1% to 28.4%.

Table 15: Unemployed by educational status and age group -2009 (000 Age 15+) *

Age group	Under high school			High school or equivalent vocational school			Higher education			Total		
	T	M	F	T	M	F	T	M	F	T	M	F
15-19	9	7	2	3	2	1	0			12	10	2
20-24	8	6	2	10	5	5	5	2	3	24	14	10
25-34	18	11	7	12	5	7	8	3	4	38	19	19
35-54	30	21	9	7	4	3	2	2	1	40	27	13
55+	5	4	1	1	1	0	1	1		6	5	1
Total	70	50	20	34	17	17	16	8	8	120	75	44

* Figures may not add up to total for rounding.

Source: www.tüik.gov.tr Labour Force Statistics Database, (accessed: 14.9.2010)

In terms of educational background, 57.5% of unemployed persons have no high school diploma, 28.3% are graduates of general or vocational high schools and 13.3% have had their higher education. The share of unemployed without high school education is 65.3% among males and 45.4% among females. The share of general or vocational high school graduates in total unemployed population is 22.7% for males and 38.6% among females. Finally, the share of unemployed people with higher education is 10.7% among males and 18.2% among females. In short, the share of high school and university graduate women in total females unemployed is 56.8%, which is quite higher than the figure for males in the same position (33.4%). This indicates that with higher levels of education women participate more to labour force, seek jobs, but face with more limited employment opportunities. Thus, high school and university graduate young women who are affected more by unemployment have to be the priority target of employment promoting labour market measures.

The share of high school and university graduates in total unemployed population is 62.5% for the age group 20-24, 52.6% for the age group 25-34 and 22.5% for the age group 35-54. This distribution shows that the educational status of young people unemployed is relatively higher than others. Still, the fact that one-third of unemployed persons in the age group 20-24 have no high school diploma is an indicator of a serious gap in education.

Table 16: Unemployed by Educational Status and by Last Economic Activity before Unemployment -2009 (000, Age 15 +)*

	Under high school			**High school or equivalent vocational school**			**Higher education**			**Total**		
	T	M	F	T	M	F	T	M	F	T	M	F
Agriculture	6	3	3	2	1	1	0		0	8	5	4
Industry	21	19	2	6	4	2	2	1	1	29	24	4
Commerce	25	18	7	12	7	5	8	4	3	46	29	16
Services	12	8	4	9	4	5	4	2	2	26	14	11
Total	65	48	17	30	16	13	14	8	6	108	73	36

* Figures may not add up to total for rounding.

Source: www.tüik.gov.tr Labour Force Statistics, (accessed: 14.9.2010)

In 2009, the shares of agriculture, trade, services, and industry in total employment are 33.9%, 27.5%, 24.7% and 13.9%, respectively. If we look at the previous employment areas of presently unemployed people, we see that 7.4% used to work in agriculture, 24.1% in services, 26.8% in industry and 42.6% in trade. This distribution shows that those working in industry and trade sectors are more vulnerable to unemployment. When the relationship between the branch of economic activity and educational status is examined, it appears that persons with education under high school constitute the largest group within unemployed people.

According to the findings of a survey conducted in May 2009 with 815 young people attending Akdeniz University, less than one-third of interviewed university students believe that they can easily find a job fitting to their education after graduation. 46% of respondents are of opposite opinion and 22% are undetermined. There is a significant relationship between the sex and family income status of the student concerned and his/her job finding prospects. It appears that males and students from higher income groups are more hopeful in this respect than females and students from lower income groups. It can be said that female students are aware of gender discrimination that women face in labour market and high rates of female unemployment. Nearly half (48.6%) of young respondents state their concerns and worries about their future. It is also observed that female students are more worried about their future than males. Only 21.8% of young respondents think their university education adequately prepares them for working life in near future. 26.25% of respondents are undecided about this issue and 52.2% find their university education inadequate in this respect. These findings demonstrating the pessimistic mood of university students who can be said to have better chances in finding jobs point out to the need to strengthen ties between university education and labour market.[34] According to the survey a large majority of respondents (81%) agree that it is the duty of the State to combat unemployment and 73.7% say they need State support

34 Mütevellioğlu N., Zanbak M., Mert M. 2010, "İşsizlik, Üniversiteli Gençlik ve Gelecek: Bir Alan Araştırmasının Bulguları (Unemployment, University Youth and Future: Findings of a Field Study) ", C.Ü. İİBF Dergisi, Volume 11, No 1, p.219-223

against unemployment and other social risks. However, only 24% believe that they will be accorded this State support. [35]

Unemployed Registered with İŞKUR

İŞKUR provincial records are available to get information about the number of registered unemployed in Antalya province.

Table 17: Labour Force and Unemployed Registered with İŞKUR -2009

	Total	Male	Female
New applicants in 2009	39913	24913	15000
Registered Labour Force	40966	28070	12896
Registered Unemployed	35448	24037	11411

Source: İŞKUR Statistical Yearbook 2009

In 2009 24,913 males and 15,000 females applied to İŞKUR Antalya Directorate for jobs. Thus, the number of registries to the İŞKUR reached 40,966. Of total registered persons, 28,070 are males and 12,896 are females. Of 35,488 persons registered as unemployed, 24,037 are males and 11,411 are females. The difference (5,518) between the figures for registered and unemployed is related to those who are looking for better jobs while being employed. The share of females is 31.5% in total registered persons and 32.2% in total registered as unemployed.

Table 18: Vacancies and Job Placements

	2009			January-June 2010		
	Total	Male	Female	Total	Male	Female
Vacant jobs	11235			15094		
Public	723			2296		
Private	10512			12798		
Presentation to employer	13870	11026	2844	14861	11562	3299
Job placement	6236	4260	1976	6834	5154	1680

Source: İŞKUR Statistical Yearbook 2009, PPS presentation by İŞKUR Antalya Directorate on 18.8.2010

In 2009, 11, 235 vacancies were reported by employers, 723 from public and 10,512 from private sector and 6,236 persons were placed in jobs. This means 55.5% of vacancies were filled. Those placed in jobs constitute 17.6% of total unemployed. The rates are almost the same for males (17.7%) and females (17.3%), thus indicating that males and females benefit equally from job placement services.

The number of unemployed persons registered declined by 1% in June 2010 to 40,523, as 27,972 males and 12,551 females.[36] In the period January-June 2010, vacancies reported by public and private sectors reached 15,094 with an increase by 34.3%. 6,834 persons were

35 ibid p.227

36 PowerPoint presentation by İŞKUR Antalya Directorate on 18.8.2010

placed in vacant jobs, giving the placement rate of 45.3%. Of those placed in jobs, 5,154 are males and 1,680 are females. Having more vacancies reported in the first half of 2010 than the same period of 2009 can be seen as a sign of leaving behind the negative effects of the latest economic crisis and beginning of recovery. Nevertheless, there is need to investigate the reasons of the difference between vacancies reported and actual job placements, which shows rejection by employers of persons presented to fill vacancies.

Table 19: Distribution of Registered Unemployment by Age Groups in 2009

Age Group	Male	Female
15-19	763	310
20-24	2901	2185
25-29	5656	2983
30-34	5329	2386
35-39	4139	1703
40-44	2913	1065
45-54	2088	686
55 +	248	93
Total	24037	11411

Source: İŞKUR Statistical Yearbook 2009

Among persons registering as unemployed, the share of those in the age group 15-25 is 15.2% for males and 21.9% for females. The share of the age group 25-34 is 45.7% for males and 47.1 for females. Finally the share of the age group 35 and over is 39% for males and 31.1% for females. Hence, the shares of males and females in the age group 25-34 are close to each other and in younger age groups the share of females seeking jobs are higher than males.

Table 20: Distribution of Unemployed by their

Educational Status in 2009

	Male	Female
Illiterate	201	209
Literate	350	185
Primary	12400	3691
Secondary	7631	4249
Pre-university	1542	1532
University	1851	1481
Master	62	63
Doctorate	0	1
Total	24037	11411

Source: İŞKUR Statistical Yearbook 2009

The largest group among unemployed males is primary school graduates, making up 51.6% of total. This group is followed by secondary school graduates (31.7%). Among unemployed females, the largest group is secondary school graduates (37.2%), followed by primary school graduates (32.3%). However, the share of female secondary and higher education graduates among unemployed women (64%) is much higher than the share of males with the same educational status among unemployed males (46%). Confirming the findings of the HLF survey, higher educational status does encourage women to seek jobs and thus they are represented at high rates in total applications to the İŞKUR.

The occupational distribution of registered unemployed persons in 2009 is as follows for females: first come those who worked in unqualified jobs (23.1%), followed by office and customer services (21.8%), associate professionals (15.8%) and services and sale personnel (13.3%). The distribution for unemployed males is as follows: those who worked in unqualified jobs (30.8%), services and sale personnel (14.9%), associate professionals (11.1%), crafts and related jobs (9%), office and customer services (7.6%), plant and machine operators and assemblers (7.3%).[37]

Job placement data by occupational groups in the period January-June 2010 shows that unqualified jobs has the highest rate of placement with 46%. The rate is 43.7% for males and 53% for females. Unqualified jobs were followed by service and sales personnel in terms of placements (38.5%). It is 40.5% for males and 32.5% for females. While unemployed women have relatively higher educational status than males and while the proportion of females working in unqualified jobs before losing them is lower than males, it is a query that they are more commonly placed in unqualified jobs relative to males. In its 2009 report, the Provincial Employment and Vocational Training Board states that this situation can be partly attributed to the fact that there is higher demand for assistant professionals to be employed in unqualified jobs and that the demand for professionals remains limited. For this reason or other, job placements are mostly in unqualified jobs.

Labour force training courses

According to İŞKUR's 2009 Antalya Labour Market Survey, 87.1% of vacant jobs are in services sector, 10.2% in industry and 2.6% is in construction sector with no vacant jobs reported from agriculture. In the services sector, tourism branch comes to the fore with more vacant jobs and 10.8% of vacant jobs are for tourism and hotel services staff. For existing vacant jobs, mostly graduates of general and vocational high schools are preferred. Among occupations for which rise in employment is expected, tourism operators lead the list while occupations for which largest decrease in employment is expected include tourism and hotel personnel. This situation is closely related to the seasonal character of tourism as a sector. [38] The number of persons recruited and discharged by specific occupations suggests that labour force mobility in occupations affected by seasons (floor custodians, waiters, cooks) is higher than in other occupational groups. In such seasonal jobs, there is always shortage of personnel due to entries and exists throughout the year.[39]

37 Antalya Provincial Employment and Vocational Training Board 2009 Progress Report

38 İŞKUR 2009, pp.19-21

39 2009 Labour Force Survey Results –Draft report of the survey commissioned upon the decision of the Provincial Employment and Training Board dated 30.01.2009, p.18. According to this survey, 15,263 employees were discharged and 19, 169 new employees were recruited within the last year. Season closure is the most widely stated reason for discharges with 25%.

As TÜİK conducted its aforementioned labour market survey in the autumn months vacant jobs are to be found mostly in the construction sector (21.3%) followed by retail trade (17.7%), wholesale trade (14%), food and beverage services (7.1%) and accommodation services (6.4%) in September 2010. Sectors in which difficulty in the recruitment of personnel is observed are retail trade (19.9%), accommodation (14%), food and beverage services (8.6%), travel agencies, tour operations, reservation services and related activities (7.1%), and health services (6.9%).[40] Need for personnel in occupations related with tourism sector points to the necessity of organising vocational training courses in these branches.

In fact in labour force training courses launched by İŞKUR in 2009, 49% of participants were given training as cook, waiter (service personnel), security personnel, floor custodian (cleaning) and receptionist which indicates the weight given to tourism related occupations. In the same year 146 labour force training courses were organized in Antalya and participated by 5,944 persons of whom 3,322 were males and 2,622 were females. The distribution of courses and number of participants are as follows: 150 persons participated to 7 courses organized in the context of grant projects. The number of participants to 4 courses organized for convicts was 59. 2,390 persons attended 55 courses with employment guarantee. There were 48 general labour force training courses with 1,868 trainees. 27 courses in the context of TYÇP (Employment Scheme for Societal Benefit) were attended by 1,488 persons and 29 persons attended 5 internship courses.

43 labour force training courses launched focused on the following occupations: Cooking (998 trainees), waiters (758), security (505), floor keeping (cleaning- 469), computerized accounting (184), reception services (183), computer operation (127) and computer programming (119). 73.5% of all participants received training in these occupations. 43.5% of participants were from the age group 16-24. Their distribution by educational status was as follows: 56% primary school graduates, 34.9% secondary school graduates and 9.1% with higher education.[41] Courses with employment guarantee launched in 2009 focus more on tourism and it is this sector which provides larger part of new employment. However, job placements are of seasonal character with increasing employment starting in May and falling in October-November through the suspension of contracts. After 8 courses in cooking launched in this context, 37 out of 94 female and 164 out of 320 male trainees were placed in jobs. There are also job placements for 15 out of 64 female trainees and 112 out of 411 male trainees in 9 service personnel training courses. There were 11 courses in floor keeping and 69 out of 206 female and 37 out of 122 male trainees in these courses were later placed in jobs. On the other hand, job placements for those receiving training in computer operation and programming remained much more limited.[42]

64.5% of 9,380 persons benefitting from unemployment insurance in 2009 are from other social, community and personal services. The proportion of those from hotels and restaurants now receiving unemployment benefits is 17.5%. [43] This relatively low proportion

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40 Abdi Öncel, Antalya Labour Market Survey, 2010 Pilot Implementation Summary Indicators, PPP, 25.1.2010

41 PowerPoint presentation by İŞKUR Antalya Directorate on 18.8.2010

42 Antalya Provincial Employment and Vocational Training Board 2009 Progress Report

43 Ibid

may derive from the frequency of seasonal employment associated with tourism which makes it harder to satisfy the requirements for entitlement to unemployment insurance.

Relationship between Labour Supply and Demand

Economic indicators in Antalya relating to growth, export potential and foreign exchange revenues show that the engine of development in this province is tourism and that this particular sector triggers production of goods and services in many other branches as well. Associated with tourism, the leading source of employment in labour market is various service areas including hotel and restaurant services in the first place. Consequently, in order to reduce youth unemployment and promote decent jobs, it is clear that priority needs to be given to tourism and related sectors. Of course, the share of agriculture in foreign trade as well as flourishing agricultural production activities marks another important potential for employment. However, as stated during interviews conducted under the UN Joint Programme study, sensitivity of tourism and agricultural sectors to uncontrollable external factors (i.e. natural disasters, epidemics, and terrorist activities, political or economic instability) makes the economy of Antalya somewhat fragile. Seasonal features of economic activities creates such problems as unbalanced cash flows and difficulty of keeping qualified personnel in hand as well as preventing the accumulation of experience and leading to such adverse outcomes as irregular income and difficulty of having access to social security benefits for employees. Therefore, there is an overall consensus on the need to develop alternatives that will spread tourism activities over the year. In making 12 months of the year active in terms of tourism, it is asserted that activities other than excursion and entertainment should be diversified and commercial and health-related tourism activities should be promoted. [44]

The SWOT analysis for Antalya suggests that strengths include availability of human resources, relatively low labour costs and a dynamic-energetic population. Weaknesses, on the other hand, include the following: shortage of labour force with adequate technical skills, unqualified labour force, limited foreign language skills, and seasonal fluctuations which may lead to economic instability; high rates of labour turnover and failure of investors to make long-term plans. Opportunities, among others, include diversification and growing business potential in such areas as health, sports, congress and faith tourism; export potential of agriculture, growth potential in industry and young and dynamic population composition. Finally, threats include: distorted urbanization as a result of migration, absence of well-established institutional structure in companies, shortage in professional management, uncontrolled prices, marketing of low quality goods, deception of tourists that decimates tourism potential, environmental pollution, degraded tourist profile and decrease in tourism revenues.[45]

Different facets of the same phenomenon are included in opportunities on the one hand and in threats on the other, complementing each other. For instance, while rapid population as a source of problem for the city has negative effects such as unplanned urbanization, gaps in infrastructure, it also has some "positive" consequences including boosting demand for consumption goods and services, creating favourable market conditions and offering a pool of cheaper labour with the existence of young population. However, as an asset utilized in all

44 Strategic Scan of priority sectors Workshop Report 100612, p.10-11

45 Stakeholder Interview Report, July 2010, p.26

branches of economic activity including tourism in the first place, cheap labour also creates a handicap as unqualified labour force with high rates of turnover. As a matter of fact, it is stated that the cost of living in Antalya is rather high for low paid seasonal workers.[46] According to İŞKUR data, the fact that most promising occupations in terms of employment increase are related to tourism management while, at the same time, having tourism and hotel services as occupations in which largest fall in total employment is expected exactly points out to this seasonal/temporary nature of employment.

All available statistics show that the level of education in labour force is low. However, it must be noted that the solution of this problem lies, in addition to qualification and skill building training courses, in the development/expansion of economic activities which offer not temporary but permanent, full-time and secured employment. Outcomes of the survey and workshop mark a paradox for business circles: Discussion groups basically address the issue over economic development priorities of sectors, express their vision for 2020 and appreciate advantages presented by cheap labour, but do not say much about how employment can be promoted in qualitative terms and how working conditions and skill levels of labour force can be improved. It is striking in this respect that in responses to the survey question “what are the most important regional problems that should be addressed in order to promote business environment in the region?” the most frequent statement is “improvements in physical infrastructure” (particularly improvements in roads) by 28 respondents whereas “improving the level of skills in labour force” remains at the bottom of the list (by 5 respondents only).[47] While problems deriving from the low qualification and skill level of labour force was mentioned during interviews, according very low priority to this problem among problems that need to be addressed can be taken as an indicator that business world in fact does not attach much importance to it. Business circles frequently speak about problems in finding top level managers; however, they seem to ignore the fact that it may be a serious problem for employees at lower echelons to be employed half year and spend the rest of the year without any job and income and that prospects of finding better paid jobs could be the reason for presently high rates of labour turnover. It must be recognized that temporary employment makes it difficult to ensure commitment, work discipline and development of business ethics. Furthermore, temporary employment also makes it difficult for employees to satisfy requirements of eligibility to unemployment insurance in the short term and to retirement in longer term. Considering the prevalence of informal employment particularly in smaller enterprises, it may turn out absolutely impossible for such employees to be entitled to unemployment, health insurance and retirement benefits.

The agriculture group in the workshop which focused heavily on the issue of employment sated the following in relation to sector problems: the priority problem is ensuring the availability of top-level managers and building skills in labour force; there is need for certificated vocational training system in order to fill the gap between top level management and lower echelons; seasonal workers need to be certified in order to prove their qualifications and skill when re-applying for jobs. Also, carrying out production activities in different areas of neighbouring provinces with different climatic characteristics will ensure continuity in the provision of goods and bring solution to the problem of seasonal employment.[48]

46 Stakeholder Interview Report, July 2010, p.11

47 Ibid. p.22

48 Strategic Scan of Priority Sectors Workshop Report 4 June 2010, p.19

Gender equality dimension too is very important in employment issues. All statistics confirm that occupations differentiate on gender basis, that there are sectors and occupations that are found as fit for women and men separately by the society and employers and that such constraints on employment prospects of women have their role in higher rates of unemployment. Nevertheless, it can not be said that this gender dimension in employment is attached much importance by participants. During the workshop, the only proposal related to women came from the Entrepreneurship and Investment Attraction Group which included the need for developing separate programmes for educated women who can be future entrepreneurs and housewives who would contribute to home economics and creation of micro-credit funds for women who want to engage in tourism related activities.[49] Although women face higher rates of unemployment despite their higher educational status than men, there is no specific sensitivity regarding their labour force participation, targeting them as a special group in vocational training and placement in jobs. When it comes to assessing selected sectors in the UN Joint Programme survey, efforts will be made to fill these gaps.

Priority Sectors

In the UN Joint Programme Antalya study launched to identify priority sectors which have sustainable economic growth potential and potential for offering decent job opportunities particularly to youth, ten sectors were selected for their higher values in terms of labour and non-labour factors. The first two are related to the production of agricultural goods with high added value. The following three are all tourism related: health services tourism, elderly care and health tourism and alternative tourism that include business, trade and fair tourism. The rest consists of some sub-branches of manufacturing industry. The first is food processing, the second is production of metal items except machinery and equipment, the third is production of construction materials and the fourth is boat building. Finally, there is the sector of general business services.[50]

By “agricultural goods with high added value” it is meant seed and seedling production and long-lasting cut flowers. These lines of production enjoy relatively low labour cost as strength, but suffer the absence of qualified labour as weakness. [51] Table 12 on the number of waged workers with social security provide no detailed information about the number of persons employed specifically in these areas, but considering the growth in fresh fruit and vegetable and decorative plant production and trade, we can associate this growth with increase from 2,814 in 2004 to 4,792 in 2009 in the number of people engaged in crop and animal farming. Hence, there is a growing employment potential. Since employers from the sector pointed to the need for certificated training in these occupations, this can be interpreted as higher chance of having training translated into actual employment. In general, female labour is commonly used in agricultural activities. Consequently, training of women in these areas and transforming their status into wage labour will be a step forward compared to unpaid family labourer status in terms of enabling them to get some returns for their labour. A mixed vocational training programme seems meaningful in this regard.

49 Ibid, p.24

50 Stakeholder Interview Report, July 2010, p.27

51 Stakeholder Interview Report, July 2010, p.28-29

Increasing employment in all service areas related to tourism suggests that it would be wise to extend support to three sub-areas mentioned that is, health services, elderly care and health tourism and alternative (business, trade and fair) tourism. In health services tourism, availability of experienced surgeons and dentists is mentioned as strength whereas lack of qualified supportive personnel (nurses and paramedical personnel) and high labour turnover are both sited as weaknesses. For elderly care and health tourism (retiree homes), the strength is the availability bi-lingual personnel experienced in hotel keeping as well as low-cost elderly care services whereas weaknesses include the shortage of qualified persons for elderly care. Finally in alternative tourism, availability of well trained and experienced personnel is strength while high rate of labour turnover and shortage of bi-lingual personnel appear as weaknesses.[52] Significant growth in health services extended to population in general as confirmed by employment increase from 1,618 in 2004 to 5,598 in 2009 demonstrates the growth potential of this sector. Of course, training of health personnel is beyond vocational training that can be offered by İŞKUR. Nevertheless, especially in elderly care and health tourism, the İŞKUR can undertake the training of personnel to be engaged in elderly care services and this may offer significant job opportunities for women. Here, it is important to incorporate foreign language training into vocational training curricula. Another consideration could be: In case such retirement/care centres can not be launched in short term, what would be the chances of employment of people already trained in these areas? A solution could be to shift these people firstly to care centres which are being launched for elderly people who are nationals of Turkey. The foundation of new health vocational high schools with the initiative of the provincial National Education Directorate for the education of highly demanded nurses seems to be very appropriate.

General business services, as suggested, can be supportive services together with administrative services associated primarily with tourism. Examples include cleaning, landscaping and passenger transportation. Strength in this area mainly comes from low labour costs whereas weaknesses include shortage of qualified and well-trained personnel, seasonality of employment and high rate of labour turnover. [53] While land transportation data provided by SGK is not limited solely to passenger transportation, there is still a significant increase in employment in this area, from 5,557 in 2004 to 12,081 in 2009. Also enjoying relatively large size of employment is buildings and landscaping activities where employment grew from 21,433 in 2004 to 28,235 in 2009. Cleaning services are rendered by both men and women without any prior training. In transportation, driving is mostly closed to women since this job is coded by society as "male job." Here, as much important as the delivery of training is ensuring that drivers are employed under decent conditions and for reasonable working hours so as to avoid traffic accidents as well. Of these three areas, it may be considered to launch training courses in landscaping and to ensure that female trainees take part equally with males in this training.

Sub-branches of manufacturing industry have also been suggested for support. The first of these is processed food which displays tendency for growth with the number of persons employed rising from 4.349 in 2004 to 6,847 in 2009. In metal processing sector, with the

52 Ibid, p.30-33

53 Ibid, p.37

exception of machinery and equipment, production related to heating and air-conditioning is suggested. According to SGK data, the number of persons employed in this branch increased from 2.840 in 2004 to 4,693 in 2009. Also suggested is the production of construction materials including cement, concrete and plaster. In this branch there is no detailed information about the number of persons employed; still, considering the vitality of construction activities in the province, it can be safely said that production in this area has a ready market and thus there will be need for labour. The final area suggested in manufacturing industry is the production of boats for leisure, sportive and cruising purposes. Activities cited as "production of other transportation vehicles" in SGK data can be interpreted in this context. Employment which was 404 in 2004 increased to 1,149 in 2009. For all these branches of activity, relatively cheap labour is stated as strength while shortage of qualified labour stands as the major weakness. [54] It is of course possible to offer training in some branches to be selected among what is mentioned above. Still, the presently male dominated nature of industry will inevitably mean much lower chances of benefitting from this training when females are concerned. Therefore manufacturing of food and beverages where female workers have a chance of employment can be preferred.

Conclusion

There is the serious problem of shortage of qualified personnel as stated for all sectors by business circles and project partners interviewed during the field study. Considering the relatively low educational status of labour force, it is necessary to train selected target groups through vocational courses in order to respond to need for qualified labour force. However, a survey conducted shows that while recruiting workers, enterprises mostly prefer (64%) vocational-technical school graduates and hardly prefer those who received occupational training (7%).[55] This situation stresses the importance of truly high quality of trainings to be delivered under the project, their success in imparting skills that enterprises are most in need of and employment guarantee. In this context, when determining the form and content of trainings to be delivered in sectors mentioned above, it is essential to solicit the opinions of employers' representatives from areas concerned as well as those of training experts.

54 Ibid, pp.33-36

55 2009 Labour Force Survey Results –Draft report of the survey commissioned upon the decision of the Provincial Employment and Training Board dated 30.01.2009, p.13

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