

# ANALYSIS OF ISTANBUL LABOUR MARKET FROM A GENDER EQUALITY PERSPECTIVE

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## FOREWORD

This study has been conducted as a part of the “More and better jobs for women: Women’s empowerment through Decent Work in Turkey”, which is implemented by the ILO and Turkish Employment Agency (İŞKUR) with financial support by Swedish International Development Cooperation Agency (SiDA). One of the objectives of the project is to collect and analyze data to carry out robust provincial labour market analyses from a gender equality perspective and to help İŞKUR and other stakeholders develop evidence-based policy options in the project pilot provinces of Ankara, Bursa, İstanbul and Konya. For this purpose, additional questions were integrated to the İŞKUR’s 2014 1<sup>st</sup> Period Labour Market Survey questionnaire with a view to understanding the gender structure of employment and labour demand as well as exploring whether employers have gender-based preferences with respect to their vacant positions or not. The comprehensive analysis of the responses that were given by employers to those questions intends to help İŞKUR increase the effectiveness of its vocational training and job placement services through evidence-based and gender-sensitive perspectives to ensure placement of more women in vacant positions that also offer decent jobs.

We wish that this study would be useful for policy makers, researchers and all stakeholders.

ILO Office for Turkey

## 1. INTRODUCTION

The present study seeks to analyse the Istanbul labour market from a gender perspective and to develop policy suggestions on this basis. The basic reference and data source of the study is the outcomes of the 1<sup>st</sup> Period (June) application of the Labour Market Demand Survey for Istanbul. Beyond outcomes specifically related to Istanbul, the study also uses findings of the same survey related to the country as a whole (Labour Market Analysis 2014, 1<sup>st</sup> Period – Turkey) and data from TURKSTAT’s (Turkish Institute of Statistics) Household Labour Force Survey (HLFS).

The basic findings of the report may be outlined as follows: Female employment in Istanbul overwhelmingly consists of wage labour. Unpaid agricultural work, which is common throughout Turkey, is almost non-existent in this province. The structure of women’s employment in Istanbul is therefore closer to that of advanced market economies in this respect; however, women’s labour force participation is quite low. Barriers to women’s labour force participation include their weak labour market attachment, which is as strong a factor as the other obstacles to labour market entry. Women mostly enter the labour market while they are single and leave not to return upon marriage and childbirth.

The findings of the study also point out a significant problem on the demand side. In addition to about half a million unemployed people in Istanbul, there are some 2 million women who are of working age and potentially ready to work but still remain out of the labour market. If half of these women were to join the labour force, at least 1.5 million new jobs would be needed. Yet, the LMDS finds that in the first period of 2014, the number of vacant jobs was below 75,000. Solutions that active labour market policies alone can bring to the problems of unemployment and low labour force participation rates in Istanbul are therefore limited. It is vital to ensure that these policies are complemented by macroeconomic policies to stimulate demand for labour.

On the supply side, data suggests that the burden of domestic care and household work significantly limits the supply of female labour. The elimination of this constraint on the supply side requires institutional and legislative mechanisms that support and develop the work-life balance. More specifically, there is need in the first place for social care services (i.e. early childhood care, preschool education and services for the elderly, sick and disabled). The encouragement of public investment in such social services is regarded as a policy measure that will both ease constraints on the female labour supply and create employment, in addition to constituting a potential area for İŞKUR’s vocational training courses.

There is a very strong gender-based occupational segregation in the Istanbul labour market. Out of 2,961 occupations identified by the Istanbul survey, almost half (1,282) are predominated exclusively by men. Women are concentrated in fewer occupations than men. Unlike TURKSTAT data, the LMDS data, which includes detailed job definitions, sheds light on the concentration of occupational segregation. The index for gender-based occupational segregation as calculated on the basis of detailed job definitions is 49.6. In other words, 49.6% of men and women would have to switch to each others’ jobs for the distribution of men and women across occupations to be exactly the same.

One cause of unequal gender distribution in occupations is on the demand side. For the first time in Turkey, an effort was made to find out to what extent this segregation stems from on the demand side by questioning em-

ployers' gender preferences for vacant jobs on the basis of a countrywide representative sample under the LMDS survey. The fact that employers prefer men for one-third of all vacant jobs while they prefer women for a tenth indicates that the demand side cause is indisputable in occupational segregation. Nevertheless, given that no gender preference is stated for almost half of all vacant jobs, one can say there is potential for encouraging women's employment. Beyond gender segregation on the demand side, factors underlying gender segregation in jobs also include women's preference for jobs allowing for a reasonable balance between work and life and that long working hours in many jobs and the lack of childcare and other services dissuade women.

By using some important data from the LMDS (i.e. occupations for which there are relatively more vacant jobs, jobs with difficulty in recruitment especially including those for which the level of education is an issue, occupations that are expected to be in greater demand, occupations for which employers are neutral in terms of gender preference, etc.) it is possible to identify employment areas in Istanbul where the potential for women's employment is stronger and toward which İŞKUR may concentrate on developing its vocational training programmes. Analyses made on this basis point out to some occupations that have the potential for providing decent jobs to women in Istanbul which can also be supported by İŞKUR's vocational training and counselling services. Topping the list of such occupations are: sewing machine operator, sales consultant, call centre operator, ironer-presser, customer representative, errand works, overlock machine operator, cooking assistant and security guard.

The second part of the report provides an account of the basic socio-demographic and economic characteristics of the province of Istanbul. Then, in the third part, the underlying characteristics of the labour market in Istanbul are examined from a gender perspective on the basis of TURKSTAT's Household Labour Force Survey data accompanied by factors determining women's employment with specific focus on the supply side. Part four examines the structure of wage employment, vacant jobs in the province, how these jobs are filled in, employers' gender preferences and employers' expectations related to future trends in employment from a gender perspective and on the basis of the Istanbul and Turkey Labour Market Demand Survey 2014-1<sup>st</sup> Period,. The final part develops some policy suggestions after summarizing major findings.

## 2. MAJOR SOCIO-DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS OF ISTANBUL

Istanbul was the most populous urban centre in Turkey with a population exceeding 14 million in 2014. Population is divided evenly in terms of sex. Its rate of population growth, 2.21‰ is above the national average (1.38‰) and it ranks 9<sup>th</sup> among provinces with in terms of rate of population growth. Istanbul is a province which receives immigrants, with a net migration rate of 0.47%; but while it receives migration in the 0-44 age group, there is out-migration of people aged 45 and over.<sup>1</sup> It is therefore possible to say that Istanbul receives migration overwhelmingly of people of working age.

71.2% of the population (10.082.000) is in the 15-64 age group, the working age interval. 23% are in the 0-14 age group and 5.9% are of age 65 and over. Istanbul accounts for 18.1% of Turkey’s total population at working age (age 15 and over), 18.6% of the total labour force (5.52 million) and 18.2% of total employment (4.66 million).

Istanbul is first among the 81 provinces in the country in terms of the level of socioeconomic development.<sup>2</sup> Over a quarter of the country’s gross domestic product originates from this province. At the time of writing this report, Istanbul held the first place among 26 regions in Nomenclature of Territorial Units for Statistics (NUTS) - Level 2 with its per capita gross value added (GVA) at USD 13,865 as of 2011 (the most recent year for which TURKSTAT’s Regional National Accounts can be found). This was 1.5 times the country average which was USD 9,244. In regional terms, Istanbul is followed by Kocaeli-Sakarya-Düzce-Bolu-Yalova provinces in Marmara region with per capita GVA of USD 13,138 and then Ankara with USD 12,259. Istanbul further accounts for about 43.8% of total taxes collected in the country and for half of the total volume of foreign trade. Exports from Istanbul steadily increased until 2008 parallel to the country’s overall export performance, but its share in total exports started falling starting from 2004 (from 57% in 2001 to 45.5% in 2011).<sup>3</sup>

In 2011, agriculture had a share of only 0.2% in Istanbul’s gross value added, which is quite low given the country average (9%). As far as services are concerned, the province’s share (72.4%) is above the country average (63.5%) while Istanbul and Turkey have very close figures when it comes to manufacturing (27.4% and 27.5%, respectively) (TURKSTAT, Regional National Accounts). In terms of the GVA share of services Istanbul holds the top place among all provinces of the country followed by Ankara (71.5%) and Izmir (67.7%). On the other hand, Istanbul is at the bottom of the list when it comes to the share of agriculture in GVA; other low ranking provinces above Istanbul are Ankara (2.8%) and Izmir (5.4%). In service sub-sectors, Istanbul comes to the fore as the province with the highest share in financial services. 86% of all bank headquarters in Turkey are located in Istanbul.<sup>4</sup> As can be seen in the chapter that follows, this composition of the GVA is also reflected in the structure of employment in the labour market. As for its share in investment incentives, Istanbul is in the 1<sup>st</sup> region and it is the province in second place after Izmir in terms of investment incentives granted.

<sup>1</sup> İŞKUR LMDS 2014. I. Period

<sup>2</sup> Ministry of Development (2013) Study on the Ranking of Provinces and Regions in Terms of Levels of Socioeconomic Development, Ankara.

<sup>3</sup> Istanbul Employment Report 2008-2011, Provincial Employment and Vocational Training Board, Istanbul, 2012.

<sup>4</sup> Istanbul Employment Report, 2012.

According to both indices (the Gender Equality Index and the Local Gender Equality Index) developed by TEPAV in the context of Gender Equality Report Card by using 2013 data, Istanbul ranks the 1<sup>st</sup> among 81 provinces.<sup>5</sup> Istanbul is the province where the rate of formal employment among women in the age group 15-65 is the highest with 26.73%, followed by Tekirdağ (26.66%) and Ankara (25.87%) (Demirdirek and Şener, 2014).

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<sup>5</sup> The Local Gender Equality Index was developed by adapting the Gender Inequality Index – GII used by the United Nations. For provinces of Turkey, Istanbul is followed by Tunceli, Bolu, Düzce and Eskişehir. The index is developed by taking into consideration such indicators as representation in municipal councils; female population with high school and university diplomas; share of under age 19 fertility in total fertility; maternal mortality rate; and formal employment for the age interval 15-65 as basis to address the status of women relative to men. In the 'Local Gender Empowerment Index', on the other hand, only the level of empowerment of women was addressed and provinces were ranked without any comparison with men. In the Local Gender Empowerment Index, Istanbul leads the list, followed by Tunceli, Tekirdağ, Ankara and Eskişehir.

### 3. GENDER-BASED ANALYSIS OF THE LABOUR MARKET IN ISTANBUL

#### 3.1. Basic Characteristics: Labour Force Participation, Employment, Unemployment and Structure of Employment

As of 2014, Istanbul had a 19.3% share of Turkey's total working age (age 15 and over) population; 20.1% of the total labour force (5.8 million); 19.7% of total employment (5.1 million); and 24.1% of the total unemployed population (688,000). The adult population in Istanbul which is not a part of the labour force (5.2 million) constitutes 18.4% of the country's total adult population which is not a part of the labour force (28.2 million). The rates of labour force participation and employment in Istanbul, which were below the countrywide averages in 2010, exceeded them in 2014. The rate of unemployment in Istanbul is, however, above the country average. Still, compared to 2010 figures, the rates of unemployment in 2014 for both Istanbul and country are lower (Table 1).

TABLE 1 – STRUCTURE OF EMPLOYMENT (1.000 PERSONS): TURKEY AND ISTANBUL, 2010 - 2014

	2010		2014	
Total	Turkey	Istanbul	Turkey	Istanbul
Age 15 and over	52,541	9,633	56,986	10,982
Labour force	25,641	4,604	28,786	5,785
Employed	22,594	3,947	25,933	5,096
Unemployed	3,046	658	2,853	688
Labour force participation (%)	48.8	47.8	50.5	52.7
Unemployment rate (%)	11.9	14.3	9.9	11.9
Employment rate (%)	43.0	41.0	45.5	46.4
Adult population not included in labour force	26,901	5,029	28,200	5,197

	2010		2014	
Men	Turkey	Istanbul	Turkey	Istanbul
Age 15 and over	25,801	4,787	28,145	5,487
Labour force	18,257	3,443	20,057	4,061
Employed	16,170	2,988	18,244	3,643
Unemployed	2,088	455	1,813	419
Labour force participation (%)	70.8	71.9	71.3	74.0
Unemployment rate (%)	11.4	13.2	9.0	10.3
Employment rate (%)	62.6	62.4	64.8	66.4
Adult population not included in labour force	7,544	1,344	8,089	1,425

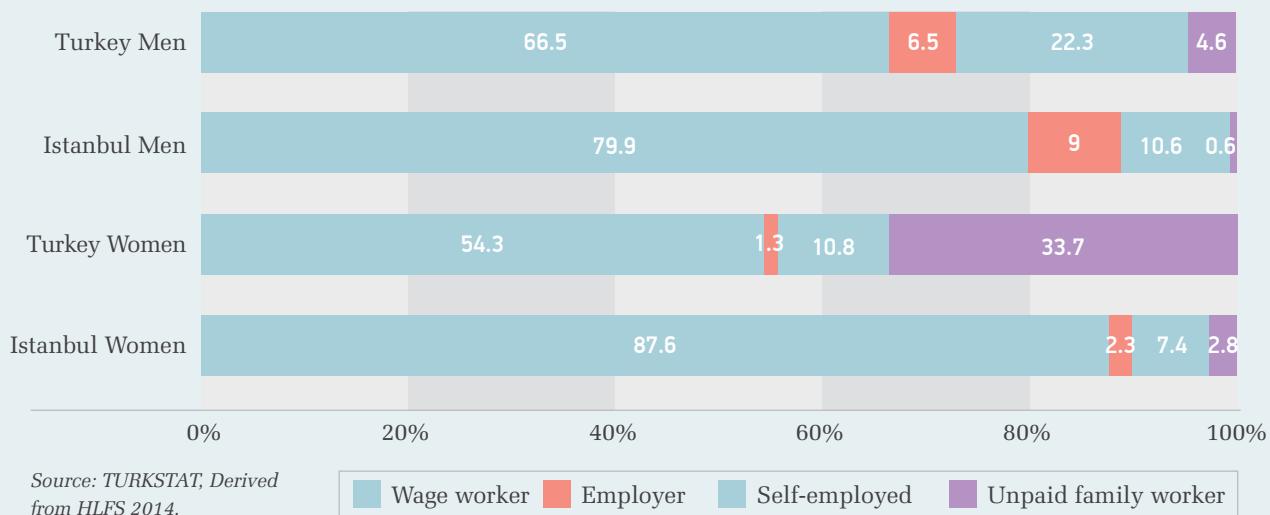
TABLE 1 – STRUCTURE OF EMPLOYMENT (1.000 PERSONS): TURKEY AND İSTANBUL, 2010 - 2014

Women	2010		2014	
	Turkey	İstanbul	Turkey	İstanbul
Age 15 and over	26,740	4,846	28,841	5,495
Labour force	7,383	1,161	8,729	1,723
Employed	6,425	959	7,689	1,454
Unemployed	959	202	1,040	270
Labour force participation (%)	27.6	24.0	30.3	31.4
Unemployment rate (%)	13.0	17.4	11.9	15.6
Employment rate (%)	24.0	19.8	26.7	26.7
Adult population not included in labour force	19,357	3,685	20,112	3,772

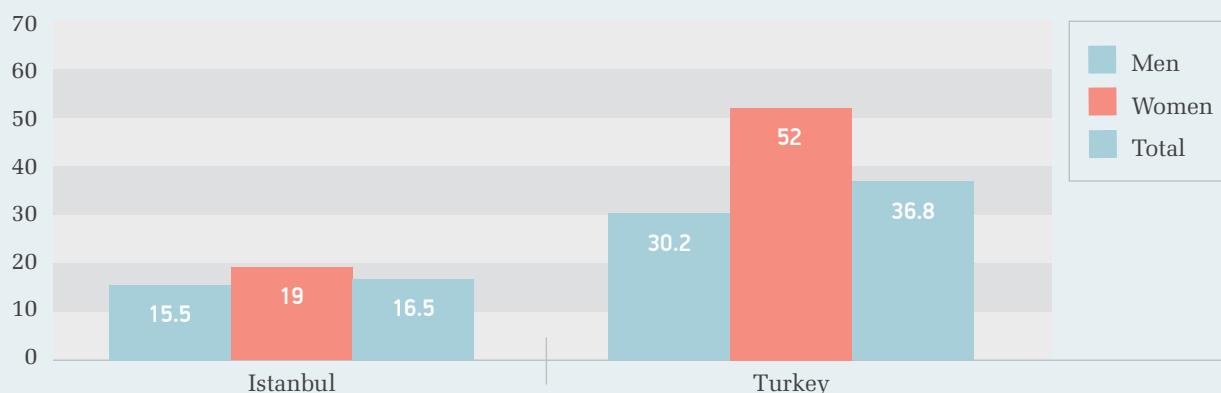
Source: [www.tuik.gov.tr](http://www.tuik.gov.tr) , Household Labour Force Survey Regional Outcomes (accessed: 1.12.2014)

Labour force and employment in Istanbul account for about one-fifth of the respective national figures while wageworkers in this province (4.2 million) claim a higher share of about one-fourth (24.5%), of the total figure. Female wageworkers in Istanbul (1.28 million) constitute 28% of total female wageworkers in Turkey (HLFS 2013). The share of Istanbul in total wageworkers is larger than its share in total employment and the reason for this difference is one of the most important factors that distinguishes the Istanbul labour market from country's labour market in general. The share of agriculture in total employment in Istanbul (0.6%) is much below the country average (25%) while the shares of services and industry (64.3% and 35.1%, respectively) are well above country averages (50% and 26.4%) (LMDS Istanbul 2014, p.17).

This sector-based differentiation of employment in Istanbul brings with it a similar divergence with respect to 'status at work' (Figure 1). While the overwhelming majority (80%) of men employed in Istanbul work for a monthly or a daily wage, this status holds true for two-thirds of total male employment in Turkey. The proportion of self-employed men (10%) is less than half of the corresponding country figure (22.3%). The distribution of women's employment in Istanbul by status at work diverges even more widely: While 88 out of 100 women employed in Istanbul are wageworkers, this is true of only 54 women out of 100 throughout the country. In Turkey, unpaid family workers constitute one-third of total female employment while this proportion is only 2.8% in Istanbul. To sum up, it is possible to say that the composition of employment in Istanbul, female employment in particular, is closer to that of advanced economies, differing from the country in general which exhibits a status at work composition resembling those of developing economies.

**FIGURE 1 – STRUCTURE OF EMPLOYMENT BY STATUS AT WORK, TURKEY AND ISTANBUL 2014**

The rate of informal employment in Turkey is 52% for women and 30.2% for men. In Istanbul, on the other hand, given that the share of agriculture is very low and there is very limited unpaid family work on the part of women, the rate of informal employment drops to 19% for women and 15.5% for men (Figure 2). This means that there are about 768,000 persons informally employed (LMDS Istanbul 2014, p.18). This is still high. However, the positive trend is that informal employment in Istanbul is in decline (parallel to what is observed throughout the country). In 2004, almost one-third of total employment in Istanbul was informal (32.3%); by 2012 this had fallen below 20 percent and the falling trend continues (LMDS Istanbul 2014, p.19).

**FIGURE 2 – RATES OF INFORMAL EMPLOYMENT (%) BY GENDER, 2013**

Source: TURKSTAT, LMDS Istanbul 2013 on the basis of HLFS 2014 (s.19).

Figure 3 compares basic labour market indicators as labour force participation and rates of employment and unemployment in Istanbul and Turkey in the period 2004-2013. In Istanbul, while the rate of male participation in the labour force was 1-2 points above the country average, just the opposite is true for women: Until 2012, the female rate of labour force participation for the country as a whole has been 3-4 points higher than that in Istanbul. The main reason for this, as mentioned above, is the very limited employment share of agriculture in Istanbul.

FIGURE 3 – LABOUR FORCE PARTICIPATION RATES (%) BY GENDER, İSTANBUL AND TURKEY, 2004-2013



Source: TURKSTAT LMDS Istanbul 2014 on the basis of HLFS 2013

Given that industry and services dominate the structure of employment in Istanbul, a better comparison can be made by using “urban” and “non-agricultural” rather than general rates of labour force participation and unemployment. Figures 4 and 5 compare labour force participation and employment rates for Istanbul with data related to urban Turkey. While the comparison of Istanbul with urban Turkey yields similar outcomes for men, the picture is very different for women. Through this comparison, it becomes clearer that the female labour force participation rate (LFPR) in Istanbul is higher than urban Turkey female LFPR and this difference reached 2.5 points in the period 2012-2013 (Figure 4). While the male LFPR in Istanbul is 2.5 points higher in keeping with the rest of Turkey when urban figures are considered, the increase in female LFPR is much more pronounced with 11.2 and 10.3 points for Istanbul and Turkey urban, respectively.

**FIGURE 4 – LABOUR FORCE PARTICIPATION RATES (%) BY GENDER, ISTANBUL AND TURKEY URBAN, 2004-2013**



Source: TURKSTAT Derived from HLFS.

It is important to ensure that the increase in labour force participation is supported by growth in employment. In fact, looking at the change in employment over the same period, it is seen that the 3.6 points increase from 63.2% to 66.8% in male employment rate in Istanbul is higher than the increase in labour force participation (Figure 5). This is reflected on the male rate of unemployment in Istanbul as a fall of 2 points: the rate of male unemployment has dropped from 11.7% in 2004 to 9.7% in 2013 (Figure 6). Meanwhile, periodic statistics for 2014 have shown a marked increase in rates of unemployment in Turkey.

Yet, employment growth for women, which was 9.6 points (from 16.4% to 26%) has remained below the increase in women's labour force participation rate. In keeping with this, the rate of unemployment for women was stagnant in this period at 15% is 1.5 times of that of men (9.7%). While the rate of female unemployment in Istanbul is higher than the rate of female unemployment in general (11.9%) it is still 2.6 points lower than the non-agricultural female rate of unemployment in general (17.4%). Finally, the rate of female employment in Istanbul (26%) is 2.6 points higher than the rate of female employment for urban Turkey (23.4%).

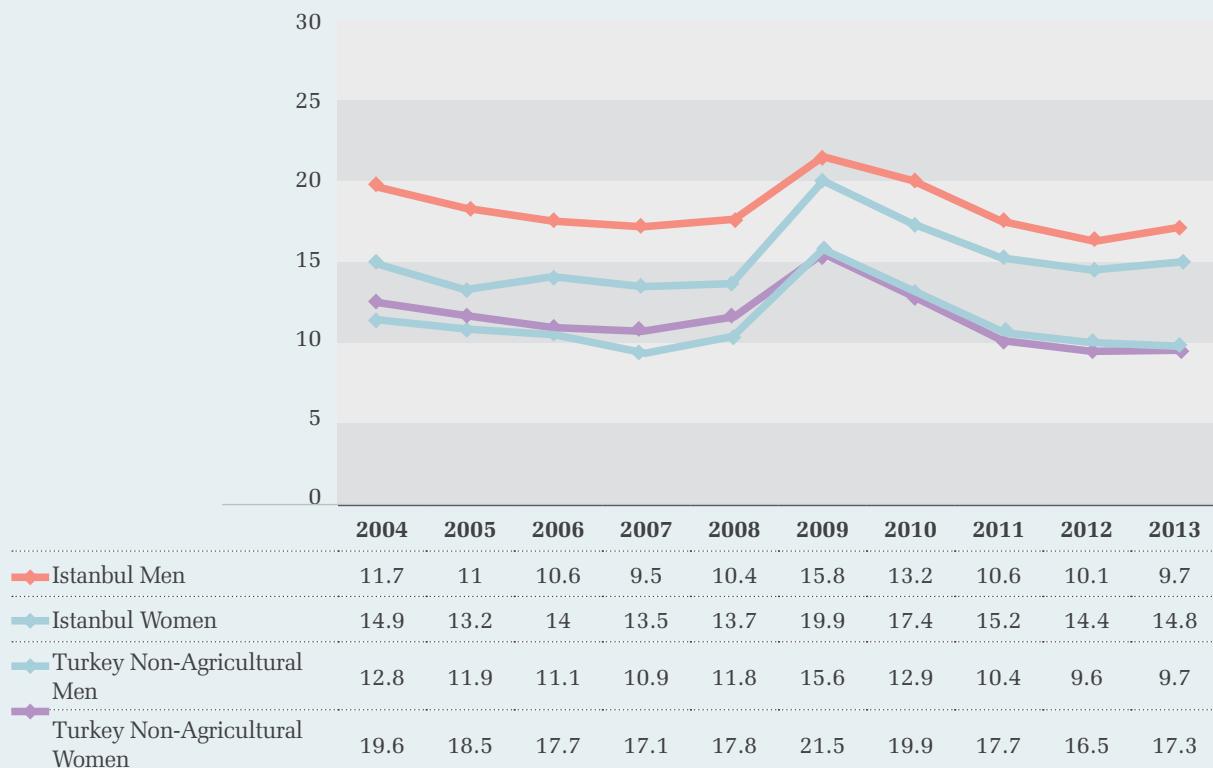
In this context, it may be said that while Istanbul is the most populous province in terms of population and potential labour force, demand-side factors in this province offer better employment opportunities to women relative to other urban centres in Turkey. The rate of female employment in Istanbul is higher than the rate of female employment in urban areas in Turkey and the rate of female unemployment is lower than the general rate of non-agricultural female unemployment. Furthermore, the nature of employment created is qualitatively better than in other parts of Turkey: Almost 90% of women in employment are wageworkers. Unpaid family work, while very common in Turkey, is almost non-existent in Istanbul, and while still high at 19%, the rate of informal employment is still well below the country average.

FIGURE 5 - EMPLOYMENT RATES (%) BY GENDER, İSTANBUL AND TURKEY URBAN, 2004-2013



Source: TURKSTAT Derived from HLFS.

FIGURE 6 – UNEMPLOYMENT RATES (%) BY GENDER, İSTANBUL AND TURKEY NON-AGRICULTURAL, 2004-2013



Source: TURKSTAT Derived from HLFS.

Although the Istanbul labour market performs better with respect to women compared to the country in general, it is still far from being adequate. In any case, women’s labour force participation is quite low and there is a wide gap of 43.5 percentage points with men. The rate of unemployment among women is quite high with 14.8%. According to 2013 data, out of 5 million women in Istanbul at age 15 and over only 1.5 million participate in the labour force, 1.3 million are employed and 228,000 are unemployed. 3.5 million women at adult ages are out of the labour force (Table 1). Accounting for those in education, the retired and others above age 65, there are 2.2 million women who are employable but are not a part of the labour force (HLFS 2013).

### 3.2. Factors Affecting Women’s Labour Force Participation in Istanbul

In the common discourse concerning women’s (low) labour force participation in Turkey, low levels of education and a frame of mind (also related to education) are frequently voiced as the leading factors. Beyond this and more recently, the problem of the work-life balance and the associated question of household service production are increasingly cited among major preventive factors, especially in the feminist social sciences literature.<sup>6</sup>

The level of education of the adult population in Istanbul over age 15 is relatively higher than the country average for both men and women (Table 2). More than two-thirds of women in Istanbul (36.3%) have at least a high school diploma. The average for Turkey is 28.9%. 41.2% of men in Istanbul are graduates of secondary or higher education against 39% as the country average. The proportion of women with a level of education lower than primary school is 10.6% in Istanbul while the figure for the country is 16.8%.

TABLE 2 – EDUCATIONAL STATUS OF POPULATION OVER AGE 15, ISTANBUL AND TURKEY, 2013

Educational Status of Population Over Age 15 (2013)	Unknown (%)	Below Primary School (%)	Below High School (%)	High school graduates (%)	University graduates (%)
Istanbul Women	4.4	10.6	48.8	21.1	15.2
Turkey Women	2.9	16.8	51.5	17.7	11.2
Turkey Men	3	5.8	52.3	24.4	14.6
Istanbul Men	5.2	3.8	48.9	25.2	16.9

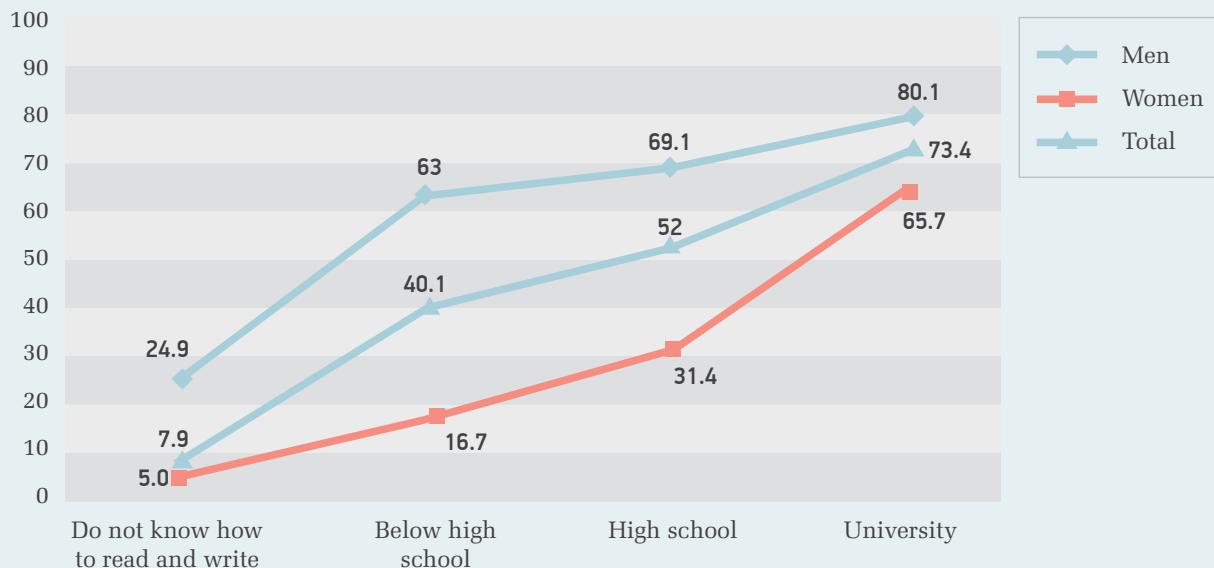
Source: Derived from TURKSTAT education statistics

Examining the rates of employment in Istanbul by educational background and gender, we observe that the rate of employment rises along with the level of education (Figure 7). This relationship is stronger when women are concerned. While the rate of employment of men varies by 17 points between lower than high school group (63%) and university graduates (80%), this interval is as large as 40 points for women. Further, there is a very wide gap between the rates of male and female employment for each level of education under higher education: the rate of employment of men with education under the high school level is higher than that of women by 46.3 points and by 37.7 points among high school graduates. This gap drops to less than 15 points only among university graduates. This education-gender-employment pattern found in Istanbul is quite similar to that observed in the Turkish labour market in general.

<sup>6</sup> See, İlkkaracan 2012; Toksöz 2012 and Zacharias, Memiş and Masterson 2014.

It is expected for the rate of employment to increase along with the level of education, that is, with more advanced labour market qualifications. However, what needs to be questioned here is why education is much more of a determinant factor in women's employment. The second question is why there is such a wide employment gap between men and women with the same educational status. For example, when persons with educational background lower than high school level are concerned, 63% of men of this educational level in Istanbul are presently employed, while the rate for women with the same level of education is only 16.7%. One may therefore ask why an educational level lower than high school is not a barrier to employment for two thirds of men, while it is such a barrier for an overwhelming majority of women.

FIGURE 7 – EMPLOYMENT RATES (%) BY EDUCATIONAL STATUS AND GENDER, İSTANBUL, 2013



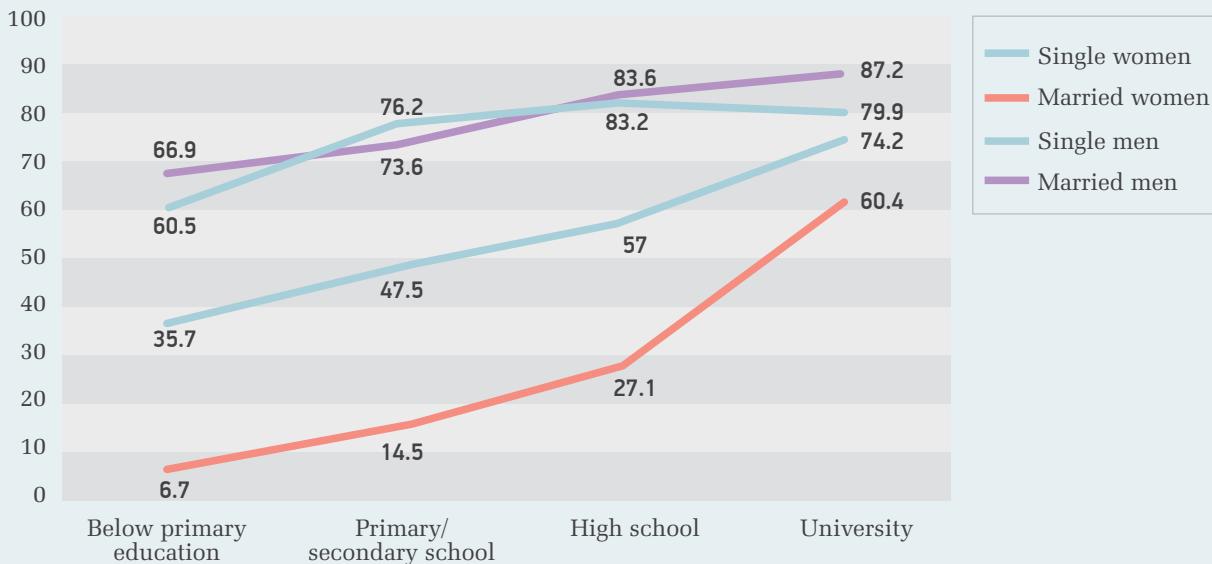
Source: TURKSTAT, LMDS Istanbul 2014 on the basis of HLFS 2013.

Using nationwide HLFS data, Ilkkaracan (2010) adds marital status as the third dimension to the above-mentioned pattern of employment with respect to gender and education, and finds that being married or single (never married) is the main determinant factor in the gender-education-employment relationship. Ilkkaracan also points out that the household and domestic care burden brought along by marriage causes women with a low educational level quitting the labour force.

Adding marital status as the third dimension to rates of employment by educational status and gender in Istanbul (Figure 8), we face, beyond male-female employment gaps, striking gaps between married and single women by educational status. The rates of labour force participation and employment diverge widely for married and never-married women by level of education. For example, while 47.5% of primary school graduate women of working age (20-64) are employed (and while 58.8% of these women participate to labour force), this rate drops to 14.5% for married women (and labour force participation rate drops to 16.1%). Similarly, there are wide gaps in those with lower than primary education (35.7% for singles and 27.1% for married) and with high school graduate women (57.8% for singles and 27.1% for married). The difference drops to the minimum of 14 points when single and married women with a university degree are concerned. For men, on the other hand, there is no marked divergence by marital status.<sup>7</sup>

<sup>7</sup> A similar pattern is also observed countrywide looking at rates of employment disaggregated by sex, educational background and marital status (See, 2010)

FIGURE 8 – EMPLOYMENT BY EDUCATION, MARITAL STATUS AND GENDER (%), ISTANBUL (AGE 20-64), 2012



Source: TURKSTAT derived from HLMS 2012.

It is possible to infer some important conclusions from the pattern shown in Figure 8. Firstly, behind the pattern of employment of women determined by the cross section of marital status and education, we find the production of goods and services necessary for household maintenance and care or, using a more common term, "housework". For women with an education level below a university degree (and particularly below high school), material returns from participating in the labour market (basically wages earned) either remain below the cost of procuring household needs from the market or at the break-even point. In this context, leaving the labour market after getting married and having children may be considered as materially sound and rational decision for many women.<sup>8</sup> As to higher rates of employment generally observed among university graduates, they are associated with wage earnings sufficient to procure household needs from the market beyond the fact that they are better qualified for the labour market. As a matter of fact, the rates of employment for married women with a university degree and high school graduate single women are very close to each other (60% and 57%, respectively).

Secondly, the fact that almost half of single women with primary education and more than half of high school graduates are employed shows low levels of education do not constitute a barrier to employment for a significant part of single women, just as it does not for men; the real barrier comes with marriage. The same may be asserted for the hypothesis "the basic barrier to women's employment is related to a frame of mind." Such high rates of labour force participation on the part of single women (LFPR 59% for single women with primary education and LFPR 72% on the part of single women with high school education) can be interpreted as showing that "the frame of mind" is not an obstacle to labour market participation for a significant majority.

Finally, Figure 8 shows that beyond obstacles to participation in the labour market, weak attachment to the labour market is a problem. According to HLFS 2012 data, 40% of women in Istanbul who are at present out of the labour force state that they were employed before. The labour force participation rate as defined by a specific reference week is 30.5% for women in Istanbul, meaning that only 31 out of 100 women were included in labour

<sup>8</sup> As a matter of fact, the leading cause for not participating to labour force when women are concerned is "preoccupation with domestic household work".

market in that given week. Adding in those women who have worked before, we find that almost 60 women out of 100 in Istanbul have had an experience in the labour market at one point in their lives.<sup>9</sup> To conclude, women's labour force participation would reach 60% and catch up with the OECD average if women's exit from the labour market upon marriage can be prevented.<sup>10</sup>

### 3.3. Work-Life Balance in Istanbul

Along with marriage and having children, the most important factor determining labour market participation consists of legislative arrangements that help balance work-family life (parental leave and other leaves for care), institutional services (kindergartens, infant schools, elderly-disabled-sick care services) and working conditions (including working hours in the first place).

Assessing working conditions in Istanbul with respect to the work-life balance, we find a negative environment similar in general to that in other parts of Turkey. For example, according to the findings of the survey conducted in 2014 by the Women's Employment Initiative Platform (KEIG) again under the ILO-İŞKUR Joint Project "More and Better Jobs for Women: Women's Empowerment through Decent Work in Turkey", there are 1.5 million children in Istanbul at preschool age (under age 5). The number of children enrolled in preschool education (excluding primary school year 1 students) in the school year 2013-2014 was 143,544. It means that preschool enrolment covers only 9.2% of the preschool age population. Examining rates of preschool enrolment disaggregated by age (Table 3) we see that the situation in Istanbul is relatively better than in Turkey in this respect. Since there is no preschool data for children under age 3, it is not possible to make any comparisons between Istanbul and Turkey or between Turkey and the OECD. Nevertheless, given that the rates of enrolment at age 3 are 7.1% and 5.9% for Istanbul and Turkey, respectively, it may be said that the rates for children under age 3 are even lower. This clearly shows how far Turkey and Istanbul, in spite of its developed status, lag behind considering that the rate of enrolment for age 3 is around 30% in the OECD and the EU. As for age 4, the rate of enrolment in Istanbul is considerably higher than country average, but still well below OECD and EU averages.<sup>11</sup>

TABLE 3 – RATES OF SCHOOL ENROLMENT AT AGE 5 AND YOUNGER (OECD 2010)

Preschool Enrolment Rates	Age under 3 (%)	Age 3 (%)	Age 4 (%)	Age 5 (%)	Ages btw 3-5 (%)	Approximate years of education from age 3 to age 5
Turkey	NA	5.9	16.2	36.5	27	0.7
Istanbul (2013)	NA	7.1	24.6	58.6	--	--
OECD Average	32.6	63	82.4	92.1	80.6	2.3
EU 27 Average	29	68.2	85.1	91.3	82.6	2.5

Source: Derived from OECD Family Database, MoNE (Ministry of National Education) statistics and KEIG (2014).

<sup>9</sup> Reasons for quitting previously held jobs for women who are presently out of labour force while having worked in the past are (excluding the retired and those still in education): husband's desire, getting married (25%); care of children or other dependent family members (19%); dissatisfaction with previously held jobs (16%); dismissal, closure of workplace (11%) and temporary nature of jobs (9.6%) (HLFS, 2012)

<sup>10</sup> İlkkaracan (2012) calls it "rate of labour market experience" which is 58.3% for women in Istanbul and above the rate for the country as a whole.

<sup>11</sup> It is not possible to make a sound comparison for age 5 since upon transition to 12 years of compulsory education in 2012 the age at starting primary education was brought down to the interval 60-66 months. Hence some children in this age group are registered in primary education, but related Ministry of National Education statistics have not been published.

### 3.3.1. Work-Life Balance in Istanbul According to the Outcomes of Labour Market Demand Survey

As stated in the Introduction, under the ILO-İŞKUR Joint Project “More and Better Jobs for Women: Women’s Empowerment through Decent Work in Turkey” a series of questions envisaged to be the basis of gender analysis were added to the questionnaire used in the 2014 1<sup>st</sup> Period Labour Market Demand Survey conducted by İŞKUR. Some of these questions are related to the availability of support mechanisms in the context of work-life balance in workplaces. In other words, questions were on whether there are childcare facilities in workplaces, transportation services and part-time employment practices. Before moving on to the 4<sup>th</sup> part, where the general results of the demand survey will be discussed, a preliminary assessment on the findings on work-life balance will be given in this sub-chapter.

According to findings, only 1% of all workplaces in Turkey have childcare facilities. This rate is even lower than 1% in Istanbul (0.8%) (LMDS 2014, p. 40). The Labour Law makes it compulsory for workplaces employing 150 or more women to provide childcare services.

Again according to survey findings, the proportion of workplaces in Istanbul which have bussing services to and back from work (34.7%) is lower than the country average (36.4%) (LMDS 2014, p.40). Yet, given that the average commute is often longer in Istanbul, it may be said that the issue is more pressing.

Employers’ gender preference for vacant jobs in Istanbul is one of the pilot questions that has been added to the 2014 survey. When employers’ gender preferences are compared with respect to workplaces with and without childcare and bussing services, we see lower preference for men and an increase in the number employers saying “gender does not matter” in workplaces which provide these services (Tables 4 and 5).

Workplaces in Istanbul with childcare facilities and vacant jobs (135 enterprises) constitute only 1% of all workplaces that have vacant jobs (out of 13,345 enterprises) (Table 4). While 43% of all enterprises with vacant jobs prefer men for recruitment, this falls to 13.5% in enterprises that have vacancies and childcare facilities. As to the option “gender doesn’t matter”, it is valid for 41.6% of all enterprises with vacancies, but increases to 72% in enterprises with childcare facilities.

**TABLE 4 – DISTRIBUTION OF VACANT JOBS IN WORKPLACES WITH CHILDCARE FACILITIES (%), ISTANBUL, 2014**

Number of Workplaces	Women	Men	Indifferent	Total
Vacant jobs in workplaces with childcare facilities	20	18	97	135
Percentage	14.8%	13.5%	72%	
Total number of workplaces with vacant jobs	1,937	5,855	5,553	13,345
Percentage	14.5%	43.9%	41.6%	

Source: LMDS, 2014

Vacant jobs in workplaces with transportation services and childcare facilities constitute 1.4% of all vacant jobs in Istanbul and 2.4% of all vacant jobs in Turkey. While the rate of male preference for vacant jobs in Istanbul in general is 39.5%, it drops to 18.5% in workplaces which offering both transportation and childcare facilities (Table 5). For such workplaces, indifference to the sex of the employee increases from 48.3% to 77.8%. A similar trend is also observed at the country level in relation to sex preference for vacant jobs on the part of workplaces with transportation and childcare services.

**TABLE 5 – DISTRIBUTION OF VACANT JOBS IN WORKPLACES WITH TRANSPORTATION AND CHILDCARE FACILITIES (%), İSTANBUL AND TURKEY, 2014**

Gender Preference	Distribution of Vacant Jobs (%)		Distribution of Vacant Jobs in Workplaces with Transportation and Childcare Facilities (%)	
	Istanbul	Turkey	Istanbul	Turkey
Women	12.1%	11.4%	3.7%	10.2%
Men	39.5%	45.7%	18.5%	13.1%
Indifferent	48.3%	42.8%	77.8%	76.6%

Source: LMDS, 2014

To conclude, it can be said that workplaces with childcare and transportation services have weaker preference for male employees for vacant jobs and employers in such workplaces do not have predetermined preferences regarding the sex of employees.

When commuting time is combined with working hours, the time cost of being in the labour market stands as an important obstacle to fulfilling household responsibilities. Among OECD countries, Turkey is among the top three countries where working hours are the longest. These long working hours encourage women towards part-time jobs in order to strike a balance between work and life, which is actually an unfair solution. As a matter of fact, while the rate of part-time work among men in Istanbul is 2.2%, it increases to 9% among women and even higher to 12.3% among women who are married. Of married women working part-time, 31.4% say they do so due to their household obligations while it is the nature of their job that makes working part-time necessary for 49% of them (HLFS 2012).

According to the outcomes of the Labour Market Demand Survey (2014) 10.9% of workplaces in Istanbul offer part-time employment. The figure for the entire country is 9.3%. In terms of the sector-based distribution of part-time jobs, manufacturing is the sector where part-time employment is the most common with 20.9%. It is followed by the wholesale and retail trade, professional, scientific and technical activities and construction sectors. Looking at within-sector distribution of workplaces employing part-time workers, 43.2% of workplaces in the human health and social services sector employ part-time workers, followed by education (34.9%) and culture, arts, leisure and sports (25.9%) (LMDS 2014, p.44). These are also the sectors in which female workers participate more commonly.

Another question on working hours added to the LMDS 2014 questionnaire is related to the impact of long working hours on making it difficult to find workers (according to the perception of employers). In general, a small part of employers stated that long working hours constitute a problem for finding workers for some jobs. However, it is possible that this is just the employers' own perception and that a survey conducted with wageworkers, particularly women, would yield a different picture. Considering survey outcomes with this reservation in mind it appears that the rates in Istanbul are relatively higher than country averages. For example, "shift work" is regarded as a problem by 13.9% of employers in Istanbul and by 9.7% of those in Turkey in general. Other problems causing difficulty in finding competent workers are as follows: difficulty in access to the workplace (by 10.7% of employers in Istanbul and by 7.1% in Turkey) and long working hours (by 7.6% and 6%) (LMDS 2014 Istanbul, p. 82).

Meanwhile, the weight of these considerations may vary significantly with respect to the occupation in question. For example, long working hours are referred to by 22.3% of employers as a factor that makes it difficult to find salespersons while the rate is 30.2% when it comes to driving-transporting. Difficulty in access to the workplace is considered as a reason for difficulty in finding cleaners by 26.3% of employers and finding security personnel by 29.4% of employers. Shift work is cited by 65.9% of employers as the reason for difficulty in finding assistant cooks and by 50.2% of employers in finding dish washers (LMDS Istanbul 2014, p. 83).

## 4. İŞKUR LABOUR MARKET DEMAND SURVEY: FINDINGS FOR İSTANBUL

Under the İŞKUR Istanbul Labour Market Survey, a sample from non-agricultural private enterprises in Istanbul employing 10 or more workers was taken<sup>12</sup> and from 12 May 12<sup>th</sup> to June 27<sup>th</sup> 2014 and 7,025 workplaces from this sample were interviewed.<sup>13</sup> This sample represents the 66,502 non-agricultural workplaces in Istanbul employing 10 or more workers as well as the 2,636,628 wageworkers employed at these workplaces. The last figure accounts for 68% of wageworkers in Istanbul and 16% of those in Turkey. This group (of 2.6 million workers) is composed of male (68.4%) and female (31.6%) workers. This is also consistent with TURKSTAT data pertaining to Istanbul. According to TURKSTAT data that also covers agriculture and enterprises employing less than 10 workers, men and women have shares of 70% and 30%, respectively in total wage employment in Istanbul. The TURKSTAT data covering the country gives a lower share for female wage-workers (26%); similarly according to the LMDS 2014 Turkey survey women have a share of 26% in total wage employment.

The following information was sought through the “Provincial Labour Market Demand Survey Establishment Information Form” applied by İŞKUR personnel in face-to-face interviews at workplaces:

- Basic establishment information (sector, number of employees, child-care centres and other services)
- Information about current employment (occupations, gender, job definitions)
- Presently vacant jobs (occupation, job definition, level of education-training and skills required, means of filling in vacant jobs, any gender preference)
- Occupations with difficulty in recruitment (job definition, the reason for difficulty according to the employer)
- Occupations expected to have higher/lower employment as of June 30<sup>th</sup> 2015 (within about a year starting from the date of the survey).

In the LMDS 1<sup>st</sup> Period Survey carried out in May-June 2014 under the ILO-İŞKUR joint project, some gender related questions were added to the survey questionnaire. As stated earlier, these were questions related to the following: Availability of childcare or transportation services to support the work-life balance; whether there is part-time work available; gender preference of employers, if any, in relation to vacant jobs; length of working hours in occupations that are difficult to fill and ease of access to the workplace.

<sup>12</sup> Agricultural and public enterprises were excluded, as well as employers in households and international organizations/agencies.

<sup>13</sup> Under the sample, 8,493 workplaces were visited, but workplace questionnaires could only be applied in 7,025 workplaces.

#### 4.1. Gender Analysis of Employment in Workplaces Covered by LMDS Istanbul

The gender and sector based distribution of employment in workplaces covered by the survey<sup>14</sup> shows that almost half of both women and men are employed in two sectors: manufacturing industry (27.42% of women and 31.43% of men) and wholesale and retail trade (17.53% of women and 16.69% of men). These two sectors are followed, for women, by boarding and food services with 11.47% and finance and insurance with 9.51% whereas for men the sectors offering third and fourth highest employment are construction with 13.13% and boarding and food services with 10.02%. Administrative and support services constitute the fifth sector for both women (8.14%) and men (6.30%). While education and health appear to be the sectors where female workers concentrate to some extent (8%) only 2.5% of male employment is in these two sectors.

**TABLE 6 – DISTRIBUTION OF EMPLOYMENT IN ISTANBUL BY GENDER AND SECTOR AND THE INDUSTRIAL GENDER SEGREGATION INDEX**

SECTORS	Female (%) (order)	Male (%)	Difference btw. Female and Male (%)
Mining and quarrying	0.12	0.27	0.15
Manufacturing	27.42 (1)	31.43 (1)	4.01
Electric, Gas, Vapour and Acclimatisation Production and Distribution	0.15	0.24	0.09
Water supply; sewage and waste management and enhancement activities	0.08	0.89	0.81
Construction	3.29	14.13 (3)	10.84
Wholesale and retail trade	17.53 (2)	16.69 (2)	0.84
Transport and storage	3.89	4.90	1.01
Boarding and food services	11.47 (3)	10.02 (4)	1.44
Information and communication	2.64	2.34	0.31
Finance and insurance	9.51 (4)	5.06	4.45
Real estate	0.58	0.77	0.19
Professional, scientific and technical activities	5.71	3.31	2.40
Administrative and support services	8.14 (5)	6.30 (5)	1.84
Education	3.55	1.27	2.28
Human health and social services	4.31	1.20	3.11
Culture, arts, entertainment, leisure and sports	0.32	0.39	0.07
Other service activities	1.28	0.79	0.49
Total	100.00	100.00	34.33
Sector-Based Gender Discrimination Index			17.16

Source: LMDS Istanbul, 2014, p.46, derived from data in Table 19.

<sup>14</sup> Categorization by sectors (branches of economic activity) is for 17 sectors (18 with the inclusion of agriculture) as specified in NACE-Rev.2.

Sector-based (or occupational) gender discrimination is a qualitative index used in measuring to what extent distribution of male and female employment is affected by gender discrimination. The index is obtained by dividing, in each sector (occupation), the difference between female and male ratios by 2. The figure obtained shows at what ratio men and women have to change their sectors for the distribution of men and women across sectors to be exactly the same. For example, according to NACE-Rev.2, the sector-based gender discrimination index is 17.16 for non-agricultural private workplaces in Istanbul that employ more than 10 workers (Table 6). This means that about one-fifth (17.16%) of men and women would have to change their sectors for the distribution to be equal.

Looking at the distribution of male and female employment by occupation<sup>15</sup> (Table 7) we see an even higher index. Indeed, almost one-fourth (22.56%) of men and women would have to change their occupations for the distribution by occupations to become equal. The occupation group in which women are most concentrated is ‘occupations that require no qualification’ (21.7%). It is followed by ‘office workers’ (20.31%) and ‘professional occupations’ (16.37%). Almost 60% of working women are in these three occupational groups. As for men, they are distributed in a more balanced pattern over eight occupational groups. The first three among these are ‘artisanship and related works’ (17.79%), ‘establishment and engine operators’ (16.65%) and ‘occupations that require no qualification’ (15.20%).

**TABLE 7 – DISTRIBUTION OF EMPLOYMENT IN İSTANBUL BY GENDER AND OCCUPATION, AND THE OCCUPATIONAL GENDER SEGREGATION INDEX**

<b>Occupational Groups (ISCO-08)</b>	<b>Female (%) (order)</b>	<b>Male (%) (order)</b>	<b>Difference btw. Female and Male (%)</b>
Office workers	20.31 (2)	10.27	10.04
Services and sales	13.77 (4)	14.56 (4)	0.80
Occupations not requiring any qualification	21.71 (1)	15.20 (3)	6.51
Skilled agricultural, forestry and fisheries	0.02	0.20	0.18
Professional occupations	16.37 (3)	10.36 (5)	6.01
Artisanship and related works	6.75	17.79 (1)	11.05
Technicians, mechanists and assistants	7.85	10.47	2.62
Establishment and engine operators	8.86 (5)	16.65 (2)	7.79
Management	4.37	4.49	0.12
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>45.12</b>
<b>Occupation-Based Gender Discrimination Index</b>			<b>22.56</b>

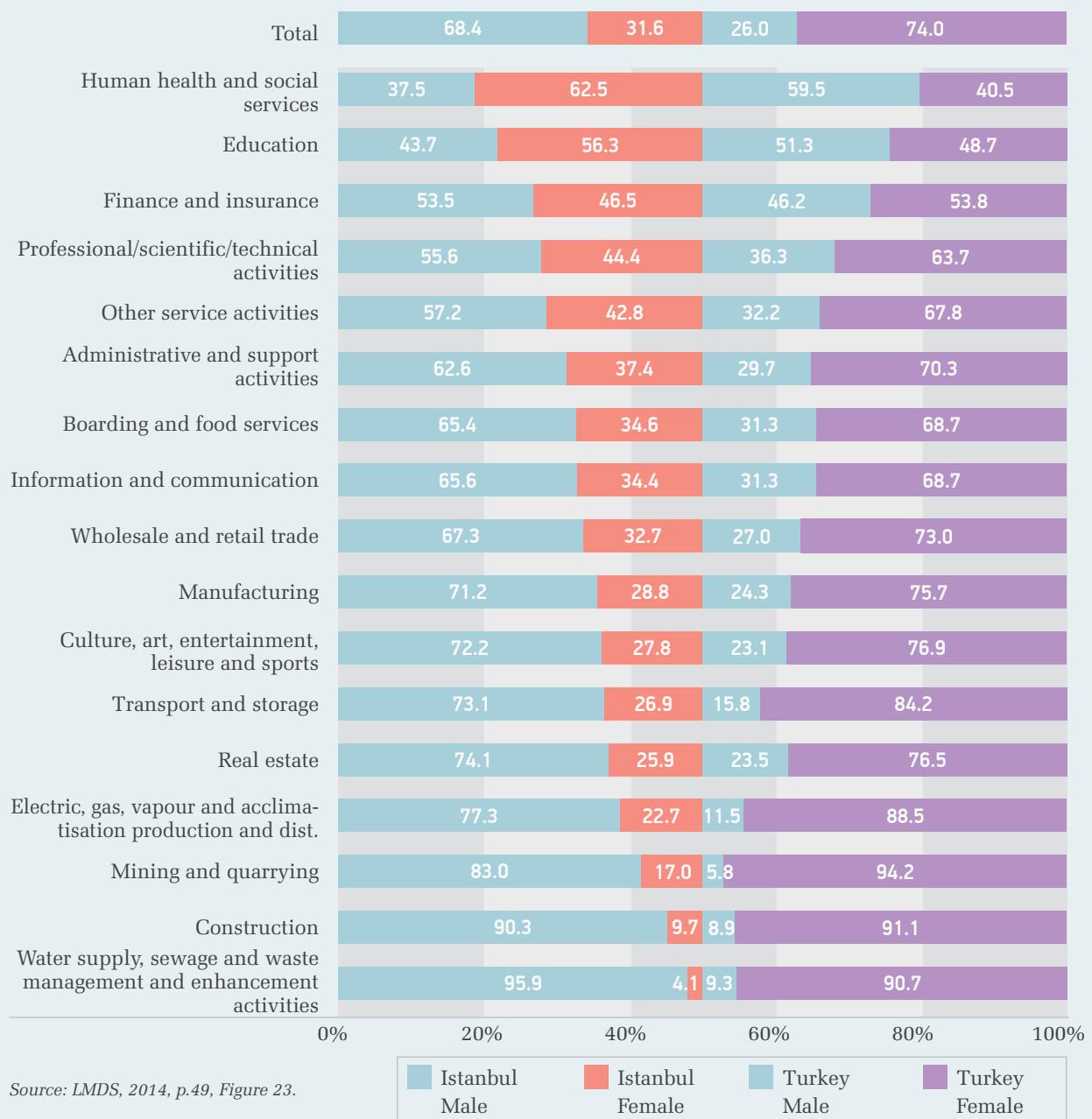
Source: LMDS Istanbul, 2014, p. 50, derived from data in Table 20.

<sup>15</sup> Categorization of occupational groups is by eight categories in total on the basis of 1 digit ISCO-08.

Figures 9 and 10 show comparative gender ratios in sectors and occupations for Istanbul and Turkey. With the exception of ‘human health and social services’ and ‘education’, men account for over half of total employment in all other sectors. The other three sectors where women’s employment share is close to half are ‘finance and insurance’, ‘professional, scientific and technical activities’ and ‘other service activities’. The share of these sectors in which women’s employment draws closer to that of men in total employment is quite small (only 15%) (LMDS 2014, p. 46, Table 19).

Given the findings of the LMDS 2014 survey for Turkey, the shares of women in all sectors without exception are higher than country averages. For example, while nearly 50% of women participate in ‘professional, scientific and technical activities’ in Istanbul, the corresponding figure is about one-third for Turkey. In ‘transport and storage’, over a quarter of employees are women in Istanbul whereas it is only by 15.8% in Turkey.

**FIGURE 9 – GENDER RATIOS IN SECTORS: ISTANBUL AND TURKEY (2014)**

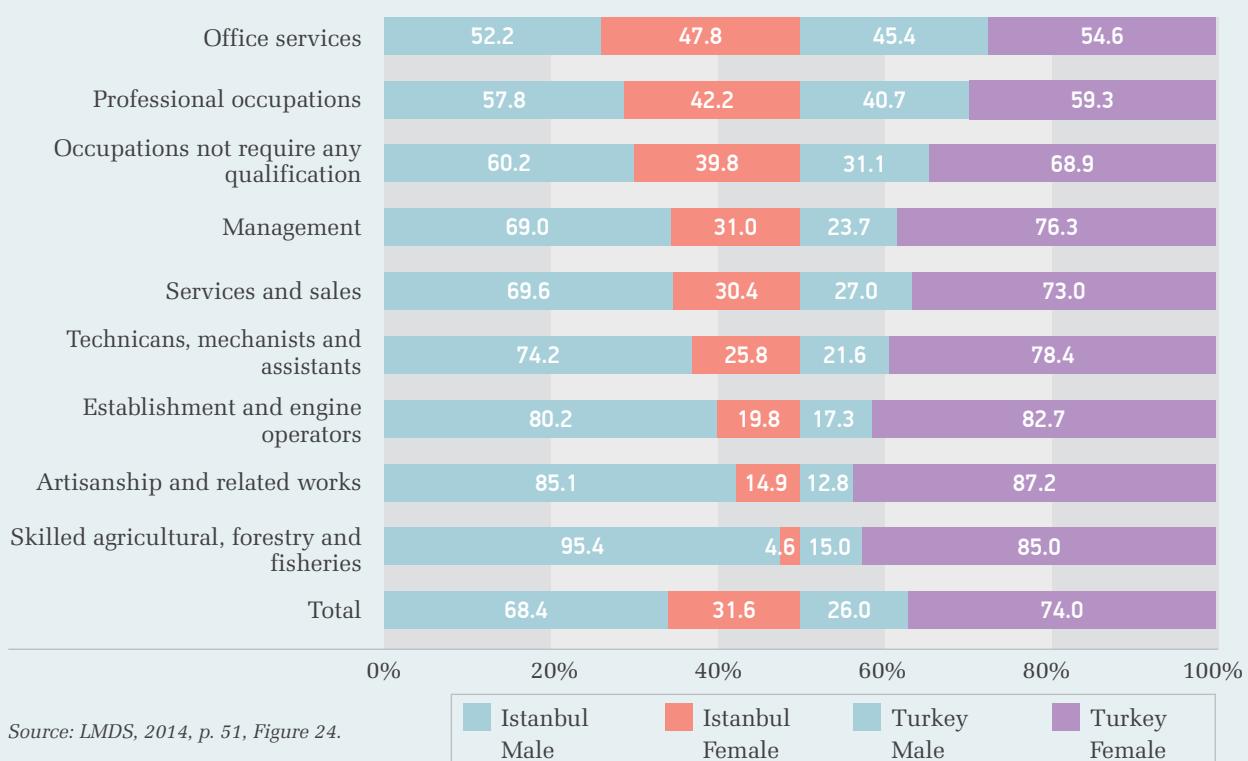


Examining gender ratios in eight occupational groups under the single-digit ISCO-08 categorization (Figure 10) we find that men account for more than half of total employment in all occupations. Three occupational groups the employees of which are more than one-third women are office services (47.8%), professional occupations (42.2%) and occupations not requiring any qualification (39.8%).

With the exception of the occupational group ‘skilled agricultural, forestry and water products workers’, the shares of women in all other occupations are higher in Istanbul than in the country in general, according to the findings of the LMDS Turkey-2014. To give an example, while almost one-third of ‘management’ positions are held by women in Istanbul, it is about one-fourth in Turkey. In ‘occupations not requiring any qualification’ women have a share of 39.8% in Istanbul and 31.1% in Turkey.

Beyond these consolidated sector and occupation categories, the LMDS survey provides more valuable data concerning the distribution of employment by detailed job groups identified at the occupation-sector intersection. For example detailed job definitions such as ‘waiter’ or ‘steward’ may be found at the intersection of the category ‘jobs not requiring any qualification’ and the sector ‘boarding and food services’ where the respective employment proportions of women and men may be identified.

**FIGURE 10 – GENDER RATIOS IN OCCUPATIONS: İSTANBUL AND TURKEY (2014)**



The LMDS has identified 2,961 occupations in Istanbul. According to raw data, in 1,282 of these occupations (43%) only men are employed. Examples include those preconceived “male jobs” such as truck drivers, crane operators or manual workers (i.e. in construction) as well as some others which do not have any specific male attribution: electricity-gas-water counter operators, fuel station workers, building insulators, plasterers, ironsmiths, etc. Men employed in exclusively male occupations constitute 15% of total male employment. On the other hand, there are 188 occupations covered by

the survey in which only women are employed. Examples include nursing in emergency services, child development specialists, midwives, master instructors (in infant classes), aestheticians, embroiders etc. Women employed in exclusively female occupations account for 1% of total female employment.

Table 8 shows the distribution of employment by sex on the basis of detailed job definitions and 15 occupations in Istanbul with relatively high employment shares. Although it appears that the rates of employment are low, varying from 1% to 4%, it should be considered that there are 2,961 job definitions and, for a fully equal distribution, each occupation should have a share of 0.03 in total employment. In this respect, for example, the fact that ‘banking services’ has a share of 3.1% in total male employment and 6.4% in total female employment means that this occupation weights heavily in total employment. As a result of women’s concentration in fewer occupations, women’s representation in the leading 15 occupations with the largest shares of women (as given in Table 8) is higher than men. These leading 15 occupations account for 39% of total female employment and 28% of total male employment.

‘Manual worker (construction)’, ‘driver/carrier’, ‘security guard’ are among the leading 15 occupations for men and they are also among the top 15 occupations in total employment. These are occupations which employ almost no women. The occupation ‘warehouse porter’ in which there are no female employees is also among the leading 15 occupations in male employment but not in total employment. On the other hand, “secretarial work”, ‘sales’ (retail), ‘customer services representative’ and ‘garments’ occupations which are among the top 15 occupations for women do not make it to the list of top 15 occupations in total employment and male employment.

**TABLE 8 – FIRST 15 JOBS IN EMPLOYMENT IN ISTANBUL-BY GENDER**

<b>Total</b>	<b>%</b>	<b>Male</b>	<b>%</b>	<b>Female</b>	<b>%</b>
Banking professional	4.1%	Banking Professional	3.1%	Banking Professional	6.4%
Cleaning staff	3.3%	Operator (Sewing Machine)	3%	Cleaning staff	6.2%
Operator (Sewing Machine)	3.1%	Waiter/Waitress	2.7%	Steward	4.6%
Waiter/Waitress	2.4%	Manual Worker (Construction)	2.6%	Accountant	3.6%
Sales Consultant	2.1%	Driver/ Carrier	2.3%	Operator (Sewing Machine)	3.4%
Steward	2.1%	Manual Worker (General)	2.1%	Sales Consultant	2.5%
Manual Worker (General)	2.1%	Sales Consultant	2%	Secretary	2.3%
Accountant	2.0%	Cleaning Staff	1.9%	Manual Worker (General)	1.9%
Manual Worker (Construction)	1.8%	Security	1.8%	Office Staff (General)	1.7%
Driver/ Carrier	1.6%	Accountant	1.3%	Waiter	1.6%
Security	1.3%	Marketing Staff	1.2%	Sales Staff (Retail)	1.5%
Marketing Staff	1.2%	Warehouse Porter	1.1%	Customer representative	1.4%
Office Staff (General)	1.2%	Steward	1%	Garment worker	1.2%
Sales Staff (Retail)	0.9%	Office Staff (General)	9.9%	Marketing staff	1.2%
Cook	0.9%	Ironer	0.9%	Tea maker	1.1%

(Source: LMDS, 2014, p.52, Table 21)

According to detailed job definitions comprising 2,961 occupations the occupational segregation index is 49.6%. It means half of men and women would have to change places for an equal distribution of jobs between men and women to become the case. Earlier, the gender discrimination index consolidated by sector and occupation groups was found to be 17.2 (sector based segregation) and as 22.6 (occupation-based segregation). It appears that gender distribution by consolidated categories substantially conceals gender segregation and that segregation on the basis of detailed job definitions is actually much higher.

#### 4.2. Vacant Jobs, Istanbul, 2014

Vacant jobs are defined as positions which are recently created, presently not occupied or soon to be vacant for which employers are actively seeking new employees. The survey shows that there were 72,826 vacant jobs in 66,502 workplaces in Istanbul (1.1 vacancy per establishment) and 198,582 vacant jobs in 200,910 workplaces in Turkey (0.99 vacancies per establishment) (LMDS 2014, p.53). 20% of workplaces in Istanbul (13,300 workplaces) stated having vacant jobs which means about 5.5 vacancies per establishment with vacant jobs. 36.7% of identified vacancies (and 33% of workplaces with stated vacancies) were in Istanbul.

On the basis of the Eurostat definition given for vacancy rate (number of vacant jobs/[employment + number of vacant jobs]) the vacancy rate in Istanbul is 2.7% (LMDS 2014, p. 91). This rate is equal to the vacancy rate in Germany (also 2.7%) which had the highest rate in EU-28 and higher than the EU-28 average which is 1.6% (Eurostat News Release 2014).

Given the number of unemployed people in Istanbul, vacant jobs are quite limited. If all vacancies were to be filled in by unemployed persons, only 12% of the unemployed would be placed in jobs (79,826/589,000) and the rate of unemployment would drop from 11.2% to 9.8%, which is still high. Accounting for students, the retired and persons in the above 65 age group, there are millions of women out of the labour force, and 2.2 million women who are employable but out of labour force (HLFS 2013). In conclusion, after all vacancies have been filled in, there remain are 516,000 unemployed people and 2.2 million women who are potentially employable in Istanbul<sup>16</sup>. On the basis of this, it can be said that the basic problem in the Istanbul labour market is that of demand while the problem of job matching to vacancies is not so grave compared to the problem of demand for labour in general.

#### Distribution of Vacant Jobs

Figures 11-13 give the distribution of vacant jobs by occupation, employers' gender preferences and current female/male ratios in occupations. Over a quarter of vacant jobs (25.2%) are in the group 'facility and machine operators and assemblers.' Male employees account for more than 80% of job holders in this category and employers prefer men for 39% of vacant jobs in this group and women for only 7%.<sup>17</sup>

Other two occupation groups in which vacant jobs are concentrated are 'occupations not requiring any qualification' (19.8% of vacant jobs) and 'services and sales' (17.9% of vacant jobs). These are followed by artisanship and related works (13.1% of vacant jobs). The first four occupation

<sup>16</sup> IPTA covers workplaces with 10 or more employees; in addition public workplaces and agriculture are not covered by the survey. Hence the actual number of open jobs is higher than the one reported by the survey.

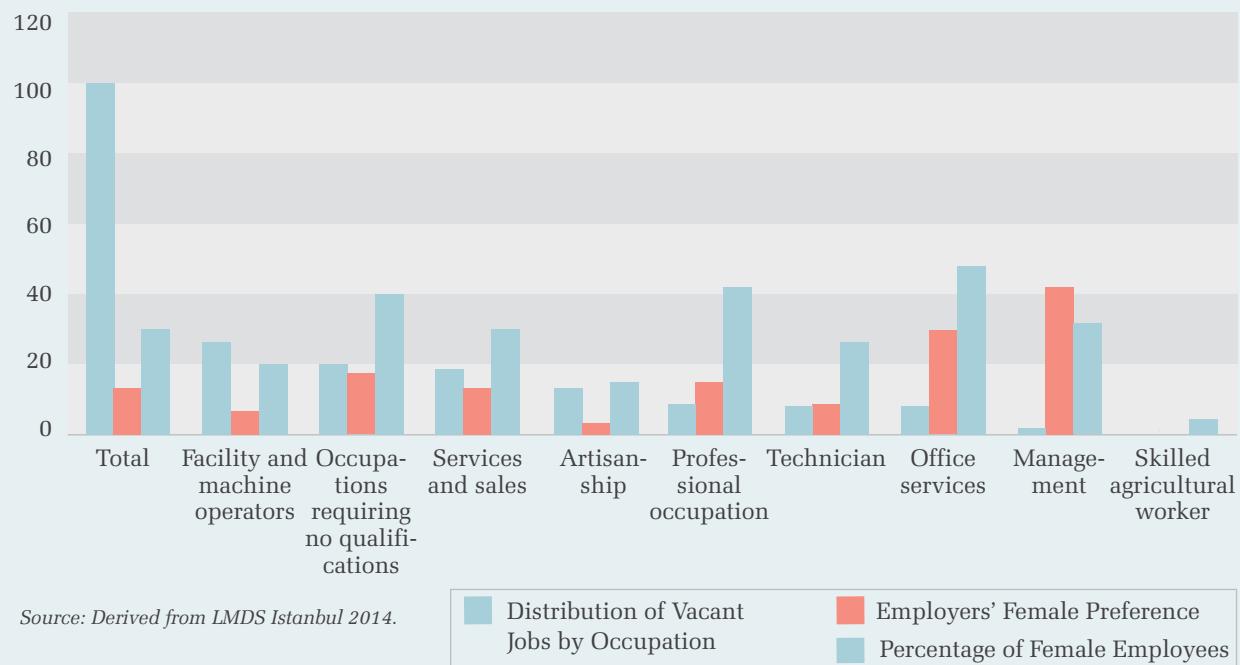
<sup>17</sup> 'Facility and machine operators and assemblers' account for 16.7% of male and 8.9% of female employment.

groups together account for 76% of total vacant jobs (LMDS Istanbul 2014, p.58). The first two ('occupations not requiring any qualification' and 'services and sales') are the occupation groups in which women are relatively more concentrated; from one-third to about half of employment consists of female workers.<sup>18</sup> Thus, when considering vacant jobs from the female employment perspective, these two occupational groups may be prioritised.. However, looking at employers' gender preferences, we find that even in these occupations with relatively high female concentration, male preference is still dominant (at least one-third for vacant jobs) while female preference remains under one-fifth.

The occupation group 'artisans and others in related works' are dominated by men with 85%.<sup>19</sup> Indeed, as will be explained below, employers' preferences in filling in vacancies are for men. Employers prefer men for 80% of the vacant jobs in this group.

In general, male preference (39.5%) outweighs female preference (12.1%) in vacant jobs; however, employers say gender does not make any difference with regard to almost half (48.4%) of vacant jobs. In Istanbul, out of 13,345 workplaces with vacant jobs 1,937 prefer only women and 5,855 prefer only men while 5,553 workplaces are indifferent.

**FIGURE 11 – PREFERENCE FOR WOMEN IN VACANT JOBS, ISTANBUL 2014**



<sup>18</sup> 21.7% and 13.8% of women and 15.2% and 14.6% of men are employed in these occupations, respectively.

<sup>19</sup> 17.8% of men and 6.8% of women are in the category 'artisans and related works'.

FIGURE 12 – PREFERENCE FOR MEN IN VACANT JOBS, ISTANBUL 2014

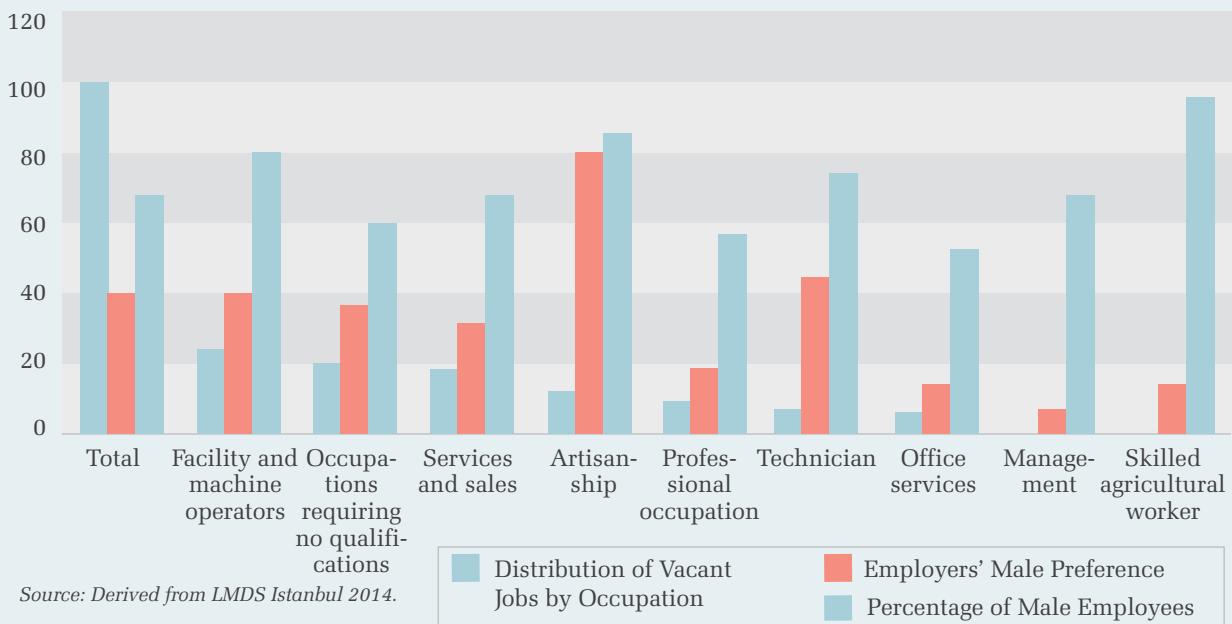
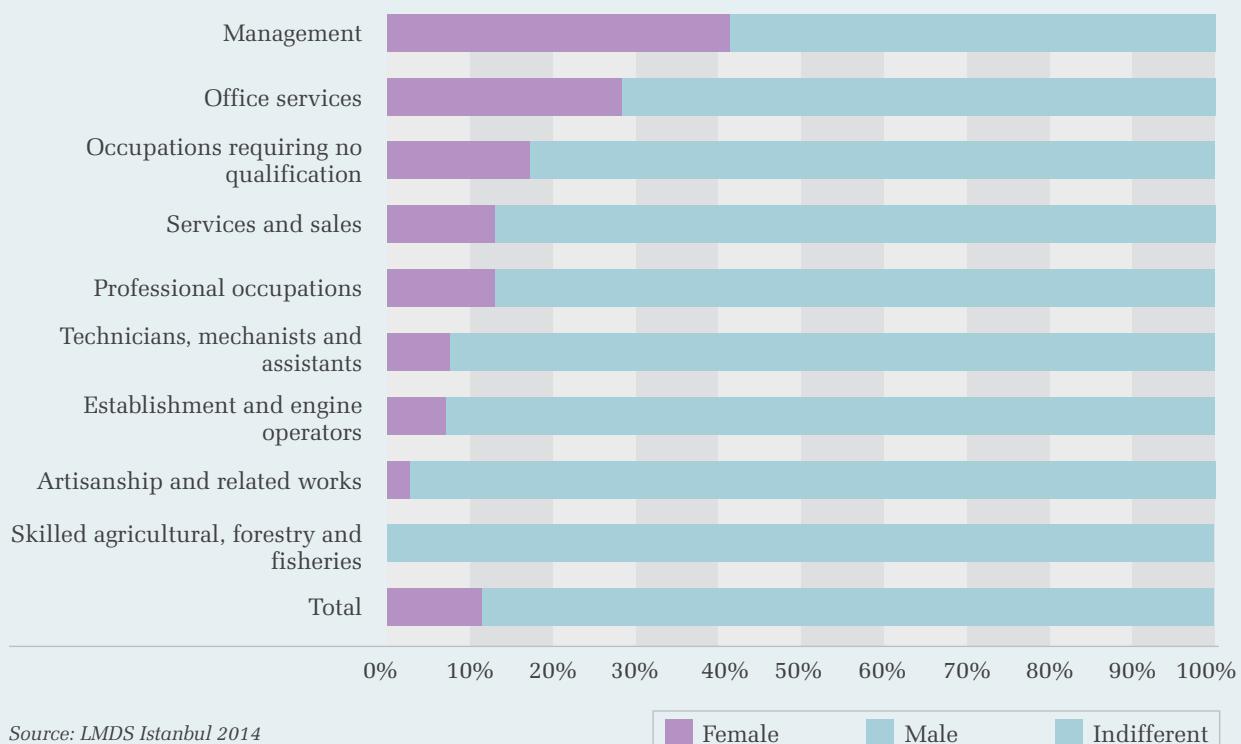


FIGURE 13 – GENDER PREFERENCE IN VACANT JOBS BY OCCUPATIONS (%), ISTANBUL, 2014



According to the distribution of vacant jobs on the basis of more detailed job definitions (Table 9, Figure 14), the first 20 vacant jobs constitute close to half of all vacant jobs (45%) and women and men presently employed in these jobs account for about one-fifth of total employment. Women account for more than half (55%) of total employment in the first 20 occupations in which there are vacancies. In eight out of the top 20 occupations the rate of female employment is above half of total employment (shown with an “\*” in Table 9) and in four it is one-third or higher (shown with “\*\*” in Table 9). Three among the leading occupations (warehouse porter, driver/carrier and security) are dominated almost exclusively by men. So, although women

account for over half (55.29%) of positions in occupation groups where vacancies are the highest, male preference outweighs female preference by 31% to 13% in the first 20 occupation groups. Jobs in which female preference is higher include sales consultancy (33% against 4%), call centre staff (32% against 0), packing (68% against 6%), handling (49% against 0) and overlook machine operator (21% against 3%).

**TABLE 9 – DETAILED DESCRIPTION AND GENDER DISTRIBUTION OF VACANT JOBS: FIRST 20 JOBS WITH HIGHEST VACANCIES**

	Distribution of Vacant Jobs by Occupation	Distribution of Male Employment by Occupation	Distribution of Female Employment by Occupation	Percentage of Female Employees	Employers' Female Preference	Employers' Male Preference
Operator (Sewing Machine)**	5.83	2.96	3.35	34.35	6.54	3.60
Manual Worker (General)**	4.39	2.13	1.92	29.44	14.84	40.15
Sales Consultancy**	3.76	1.97	2.47	36.77	32.80	3.53
Warehouse Porter	3.47	1.13	0.02	0.93	5.77	93.13
Driver / Carrier	3.09	2.33	0.01	0.10	3.29	95.74
Waiter	2.76	2.33	1.58	21.19	0.00	32.13
Cleaning Staff*	2.76	1.92	6.17	59.74	13.06	11.18
Call Center Staff*	2.18	0.27	1.03	63.75	31.91	0.00
Plastic Injection Production Staff	1.82	0.39	0.16	16.12	3.60	38.45
Security	1.74	1.76	0.19	4.84	0.00	58.18
Packing Worker (Manual)*	1.67	0.29	0.78	55.65	67.55	6.41
Ironer	1.62	0.89	0.53	21.75	10.10	15.08
Steward	1.52	0.96	4.58	68.82	10.68	15.32
Handling (Textile)*	1.35	0.42	0.85	48.50	1.41	15.35
Bellboy	1.29	0.46	0.10	9.20	0.00	49.71
Packer (Manual)*	1.27	0.32	1.08	60.73	48.57	0.00
Customer Representative*	1.24	0.51	1.44	56.68	4.97	1.19
Overlook Machine Operator*	1.13	0.07	0.34	70.57	21.13	3.36
Assistant Cook**	1.02	0.48	0.55	34.57	0.00	23.29
Credit Card Marketing Staff	1.00	0.00	0.00	0.00	0.00	100.00
<b>TOTAL</b>	<b>44.92</b>	<b>21.56</b>	<b>21.96</b>	<b>55.29</b>	<b>13.54</b>	<b>31.00</b>

Source: Derived from LMDS Istanbul 2014.

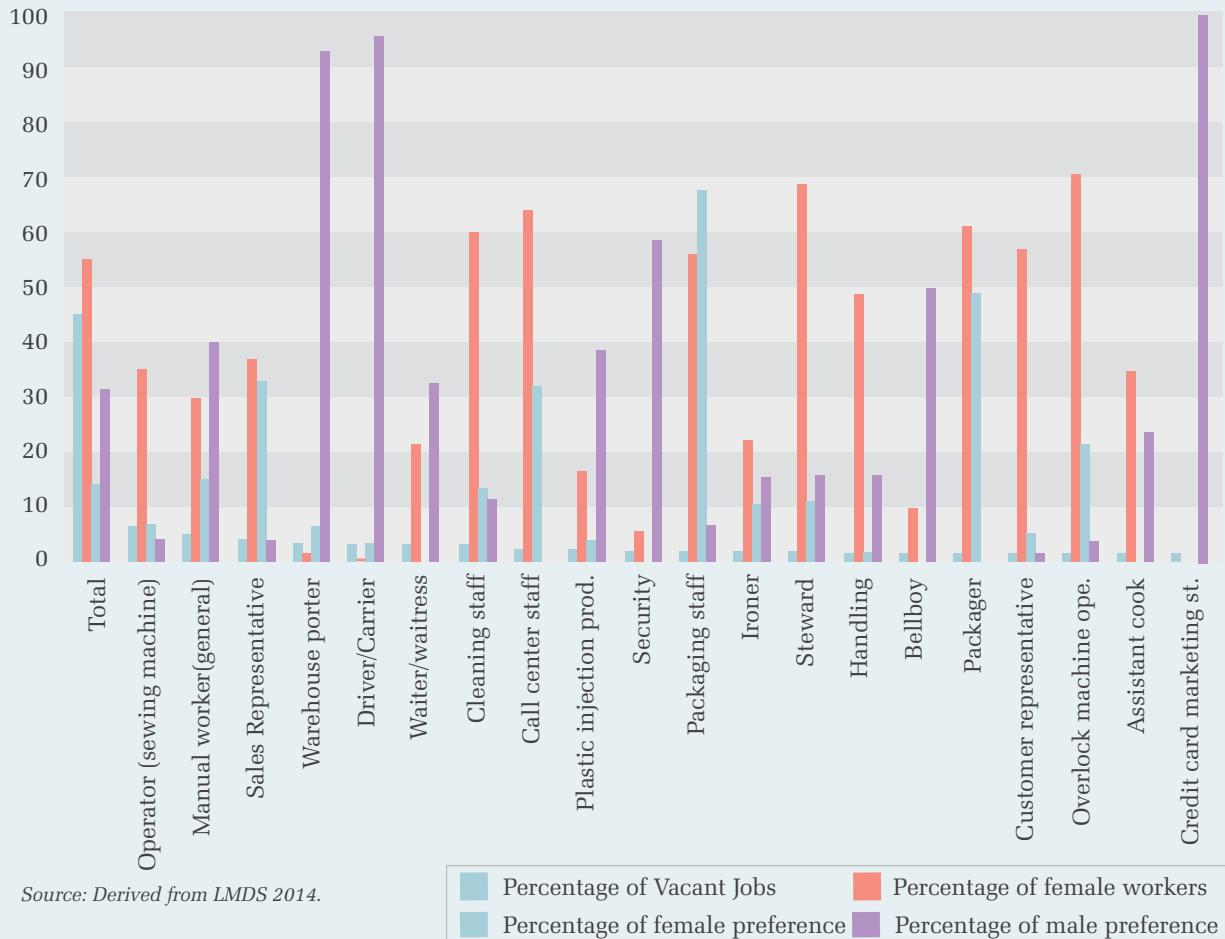
\*Occupations that women rate is more than the half of the total employment.

\*\*Occupations that women rate is more than one third of the total employment.

Employer preferences in filling in vacancies with regard to education (Table 10) are mostly 'education does not matter' (34.17%) or 'high school or lower education is sufficient' (27%). So it can be said that two-thirds of vacant jobs do not require a high level of education. This is particularly true for men (28.5% + 41.1% = 69.6%). Examples include warehouse porter, manual works and bellboys that are included in the first 20 in vacant jobs with male preference. A low level of education is considered sufficient for 55.2% of jobs for which women are preferred (21.3%+33.9). For 58.9% of vacant jobs in which no gender preference is made, a low level of education is not regarded as a problem.

It is stated that high school level education is required for 40.5% of jobs in which female preference is stressed. Such jobs as “sales consultant” and “call centre operator” in which female preference is more pronounced are among those that require high school education. In jobs where there is particular preference for men, 24.5% require a high school education. As to vacant jobs in which there is no gender preference, high school education is required in 27.2% of these jobs.

**FIGURE 14 –DISTRIBUTION OF VACANT JOBS BY DETAILED DESCRIPTION AND GENDER: FIRST 20 JOBS WITH HIGHEST VACANCIES**



Source: Derived from LMDS 2014.

**TABLE 10 - DISTRIBUTION OF VACANT JOBS BY REQUIRED LEVEL OF EDUCATION-GENDER, İSTANBUL, 2014**

Educational Level	Female	Male	Indifferent	Total	Female	Male	Indifferent	Total
Apprenticeship Training	85	575	804	1,464	1%	2%	2.3%	2%
Below High School	1,879	8,165	10,241	20,285	21.3%	28.5%	29.2%	27.9%
High School	2,890	2,806	6,231	11,932	32.7%	9.8%	17.8%	16.4%
Vocational High School	438	3,372	1,734	5,544	5%	11.8%	4.9%	7.6%
Vocational School of Higher Education	248	842	1,261	2,351	2.8%	2.9%	3.6%	3.2%
Undergraduate	287	1,072	3,931	5,290	3.2%	3.7%	11.2%	7.3%
Graduate	14	72	439	524	0.2%	0.3%	1.3%	0.7%
No preference	2,995	11,788	10,423	25,206	33.9%	41.1%	29.7%	34.7%
Total	8,835	28,693	35,063	72,596	100%	100%	100%	100%

Source: Derived from LMDS 2014.

Besides education, there are some other skills and competencies required including “business ethics” (76.2%), “physical competence” (69.8%) and an “affinity for teamwork” (61.5%) which are stated as necessary qualifications for filling in vacant jobs in Istanbul as well as in Turkey in general (Table 12). For over half of vacant jobs in Istanbul, employers also frequently mentioned some other skills and competencies: “occupational competency” (53.4%), “communication skills” (51.5%) and “willingness for overtime work” (51.1%). The ranking of skills and competencies required by employers are largely the same for men and women. However, skills associated with qualifications in vacant jobs with female preference are relatively more sophisticated relative to vacant jobs where the preference is for men. For example, communication skills is stated for 61% of vacant jobs with female preference, problem solving and decision making for 41.9% and skills in sales and marketing for 28.63%.

For more than half of vacant jobs in Istanbul (for 41.9% of vacant jobs in Turkey) willingness for overtime work is stated as a condition for eligibility. It can be said that this requirement constitutes a problem area and basis of discrimination against married women with children. ‘Being able to travel’ is stated as a requirement for 15% of vacant jobs with male preference and 10% of vacant jobs with female preference.

**TABLE 11 - SKILLS NEEDED IN VACANT JOBS BY GENDER, ISTANBUL 2014**

	Female	Male	Indifferent	Total
Business Ethics	72.08	73.63	79.33	76.19
Physical Competence	67.73	74.97	66.01	69.76
Team Work	58.10	60.60	63.17	61.53
Sufficient Professional/Technical Knowledge and Experience (Occupational competency)	54.38	52.24	54.20	53.44
Communication Skills	61.01	42.64	56.28	51.46
Willingness for overtime work	46.78	53.36	50.37	51.11
Problem Solving and Decision-Making Skills	41.90	23.15	33.83	30.59
Calculation Skills (Analytical Skills)	40.34	34.39	47.74	30.32
Computer literacy	41.70	14.57	29.71	25.18
Project-based Working	12.21	18.61	25.13	20.98
Sales and Marketing Skills	28.63	12.18	20.52	18.21
Ability to travel	9.66	14.89	13.39	13.53
Foreign language skills	8.63	5.51	14.92	10.44

Source: Derived from LMDS 2014.

In both Turkey and in Istanbul, İŞKUR is the main channel through which employers look for employees for their vacant jobs (for 52% of vacant jobs in Istanbul and for 60% of vacant jobs in Turkey). In Istanbul, job seeking through family members, friends, associates etc. is done at a rate of 52%, which is lower than the rate for Turkey (60%). Formal channels are more widely used in Istanbul. Also, the use of other channels in seeking employees for vacant jobs is more common in Istanbul: newspapers/advertisements (48.9%), internet/social media (41.4%) and private employment agencies (11.1%) (LMDS Istanbul 2014, p. 69).

### 4.3. Jobs with Difficulty in Recruitment, Istanbul, 2014

Workplaces interviewed under the Labour Market (Demand) Survey were asked in which occupations they had difficulty in recruiting workers in 2014. 34.5% of 66,502 workplaces in Istanbul (22,916 workplaces) responded that they faced such difficulties. This means 35 out of 100 workplaces in Istanbul face difficulty in finding workers. The figure for Istanbul (the number of workers sought in jobs with difficulty in recruitment) is 94,216 and for Turkey in general the number is 282,704.

The first 20 among occupations with difficulty in recruitment (Table 13) largely overlap with the first 20 occupations in which vacancies are concentrated (see Figure 14 above). 12 occupation groups in which vacancies are concentrated are also those that employers have difficulty in filling in (machine operator, sales consultant, waiter, security guard, manual worker, cleaner, call centre staff, warehouse porter, bellboy, steward, driver-carrier, plastic injector production worker). Of these, 'call centre staff' was found as the one in which preference for women is dominant (female preference of 32% and 0% preference for men). The leading reasons for difficulty in finding employees as stated by employers (Table 14) include a lack of required competency (by 66.2%), dissatisfaction with the offered working environment and conditions (by 50.6%) and the offered wage rate being found to be too low (by 41.7%).

Other occupations with relatively high female preference include sales consultancy (33% against 4%), packing works (68% against 6%), handling (49% against 0) and overlock machine operator (21% against 3%). Occupations with male preference that make it to the top 20 are not among the top 20 in terms of difficulty in recruitment. The existence of vacancies in these jobs can be explained by the high rate of labour turnover rather than difficulty in finding competent workers.

It may be said that among the first 20 occupations with difficulty in recruitment, those occupations in which vacancies are concentrated and there is no strong gender preference have specific potential for offering employment opportunities to women. For example, for 'machine operator' (sewing machine) and 'sales consultant' which appear at the top of the list in both vacant jobs and occupations with difficulty in recruitment, employers state 'unavailability of persons with required skills' as the reason for difficulty (62.3% and 66.7%, respectively). This specific intersection (vacant jobs, no gender preference and demand for competency) can be the basis of determining the content of vocational training courses to be launched by İŞKUR.

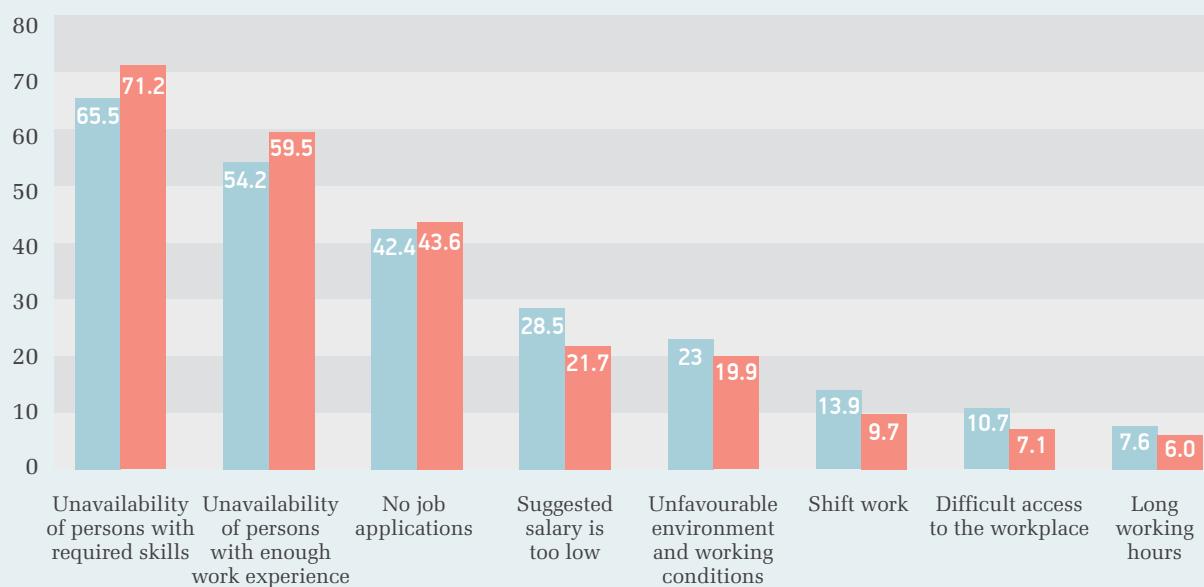
"Low wages", "unfavourable working environment and conditions", "difficult access to the workplace" and "long working hours" are more frequently stated in Istanbul than the average for Turkey as reasons for staying away from some vacant jobs. It should be considered that these are factors affect women more than men when it comes to labour force participation and attachment after marriage.

TABLE 12 - DISTRIBUTION OF JOBS WITH DIFFICULTY IN RECRUITMENT, ISTANBUL, 2013-2014

2013			
Occupation	Percentage	Occupation	Percentage
Operator (Sewing Machine)	11.4%	Operator (Sewing Machine)	6.4%
Sales Consultant	1.2%	Sales Consultant	3.8%
Waiter/Waitress	1.5%	Waiter/Waitress	3.1%
Security	5.8%	Security	2.5%
Manual Worker (General)	2.2%	Manual Worker (General)	2.3%
Cleaning staff	1.6%	Cleaning staff	2%
Call centre staff	2.7%	Call centre staff	1.6%
Bellboy	0.8%	Warehouse porter	1.4%
Handling (Textile)	3.7%	Bellboy	1.3%
Ironer	1.6%	Handling (Textile)	1.3%
Marketing Staff	1.2%	Ironer	1.3%
Overlock machine operator	1.6%	Steward	1.3%
Moulder/Presser	1.2%	Driver / Carrier	1.2%
CNC Turning Machine Operator	1.1%	Marketing Staff	1.1%
Manual Worker (Construction)	1.1%	Assistant Cook	1.1%
Plasterer	1%	Accountant	1%
Electrician	0.8%	Cook	1%
Gas Station Sales Staff	0.8%	Truck/Tow Truck Driver	0.9%
Quality Control (Textile)	0.8%	Plastic Injection Production Staff	0.9%
Construction Staff Moulder (Manual)	0.8%	Looping Machine Operator	0.9%

Source: LMDS, 2014, p.79, Table 40.

FIGURE 15 - REASONS FOR RECRUITMENT PROBLEMS IN JOBS WITH DIFFICULTY IN RECRUITMENT, TURKEY-ISTANBUL, 2014



Source: LMDS, 2014

Istanbul	Turkey
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TABLE 13 - REASONS FOR RECRUITMENT PROBLEMS IN JOBS WITH DIFFICULTY IN RECRUITMENT, İSTANBUL, 2014

Occupations	No applica-tions	Unavailability of persons with required skills	Unavailability of persons with enough work experience	Unfavourable environment and working conditions	Salary is too low	Working in shifts	Difficult access to the work-place	Long working hours
Operator (Sewing Machine)	52%	62.3%	46.5%	21.8%	29.4%	7.3%	9.7%	9.2%
Sales Consultant	57.6%	66.7%	51.6%	32.7%	30%	10.9%	2.5%	22.3%
Waiter	37%	54.6%	57.2%	36.4%	28.4%	14.7%	11.3%	11.5%
Security	44.1%	52.7%	27.5%	35%	87.3%	25%	29.4%	6.3%
Manual Worker (General)	41.3%	31.3%	20.1%	48.7%	45.7%	33%	18.1%	17.7%
Cleaning Staff	46.6%	39.2%	28.8%	39.2%	39.6%	13.8%	26.3%	6%
Call Centre Staff	49.6%	66.2%	26.1%	50.6%	41.7%	6.5%	17%	5.6%
Warehouse Porter	29.1%	1.7%	2.8%	15.9%	6.2%	20.9%	65.2%	1.1%
Bellboy	45.5%	49.1%	46.7%	17.9%	36.7%	21.8%	11%	18.7%
Handling (Textile)	48.2%	50.5%	27.9%	19.9%	28.4%	1.1%	1.1%	1.1%
Ironer	74%	47.6%	52.4%	31.6%	17.9%	0	0	3.4%
Steward	31.1%	43.9%	52.8%	19%	58.5%	50.2%	16.9%	8.7%
Driver/Carrier	39.4%	66.6%	55.1%	45%	49.9%	2.3%	14.7%	30.2%
Marketing Staff	41.3%	89.6%	71.2%	25.5%	10.4%	2.6%	4.7%	3.5%
Assistant Cook	18.9%	31.6%	95%	5%	79%	65.9%	1.2%	0
Accountant	18%	86.2%	70.4%	12.3%	22%	6.7%	15%	11.6%
Cook	55.6%	82.8%	57.6%	16.7%	21.3%	8.3%	4.6%	12.5%
Truck/Tow Truck Driver	8.6%	99.9%	91%	0	0	0	0	0
Plastic Injection Production Staff	27.8%	48%	41.9%	27.7%	46.4%	29.8%	21.7%	9.3%
Looping Machine Operator	43.4%	97.1%	67.8%	13.6%	9.8%	4.9%	1.6%	9.3%
Total	42.4%	65.5%	54.2%	23%	28.5%	13.9%	10.7%	7.6%

Source: LMDS, 2014

#### 4.4. Expectations of Employment Trends in the Coming Period, Istanbul 2014

Under the LMDS, employers are also asked how much growth or decline they envisage in employment in their workplaces within a year following the questionnaire. According to responses given to this question, 18.8% of employers in Istanbul expect net employment growth in their workplaces within a year from June 2014, when the questionnaire was applied, to June 2015. This is 3 points lower than the rate of employers in Turkey who expect employment growth in their workplaces (21.8%). On the other hand, 4% of employers in Istanbul envisage decline in employment in their workplaces in the same period and the rate for Turkey is the same.

A net change in employment of 125,229 is expected in Istanbul by June 30<sup>th</sup> 2015. In other words, expected growth in employment in workplaces covered by the LMDS is by 4.7%. The distribution of net employment growth shows that net positive growth is expected in all sectors (Table 15) and in all occupation groups (Table 16) on the basis of consolidated categories. The sectors where expectations of employment growth are the highest include manufacturing (24% of expected growth), administrative and support services (22% of expected growth) and construction (16% of expected growth). Of these three

leading sectors, only the administrative and support services have a relatively high share of women’s employment. As far as LMDS coverage in concerned, women have a share of 37.4% in total wage employment in this sector. The other two are male dominant sectors: manufacturing (women’s employment share: 28.8%) and construction (women’s employment share only 9.7%).

Looking at employment growth expectations by occupation (Table 16), net employment growth is expected mostly in services and sales (24% of expected net growth), unqualified jobs (16%) and artisanship and related jobs (16%). Women have a relatively high share, with 39.8%, in ‘unqualified jobs’. At present, women have a share of 30.4% in ‘services and sales’ and only 14.9% in ‘artisanship and related jobs.’

In Istanbul, a net increase of 125,229 persons is expected in employment and it is possible to draw up a rough estimate of the share of women in this expected increase on the basis of existing rates of women’s employment. These estimates are shown in Table 17 by sector and in Table 18 by rates of women in occupation and expectations of increase in employment. Accordingly, about 30-31% (38,000-39,000 jobs) of the expected net increase makes for potential growth in women’s employment. This is similar to the share of women in total employment which is 31.6%. This suggests that the distribution of expected employment growth by sectors and occupations does not display a pattern that specifically favours women’s employment. In other words, unless there is intervention through active policies the lion’s share in expected employment growth will once more go to men.

**TABLE 14 - NET EMPLOYMENT EXPECTATIONS BY SECTOR, ISTANBUL 2014**

Sector	Istanbul			Turkey	
	Net Employment Change for June 30, 2015	Total Number of Employees	Percentage of Net Employment Change for June 30, 2015	Percentage of Net Employment Change for June 30, 2015	Percentage of Net Employment Change for June 30, 2015
Mining and Quarrying	381	5,764	6.6%	5.2%	
Manufacturing	30,437	795,338	3.8%	4.6%	
Electric, Gas, Vapour and Acclimatisation Production and Distribution	91	5,506	1.6%	0.8%	
Water Supply; Sewage and Waste Management and Enhancement Activities	281	16,683	1.7%	4.1%	
Construction	20,006	282,164	7.1%	7.3%	
Wholesale and Retail Trade	17,597	447,128	3.9%	4.9%	
Transportation and Storage	3,925	120,720	3.3%	3%	
Boarding and Food Services	5,093	276,353	1.8%	2.9%	
Information and Communication	2,959	64,167	4.6%	5.3%	
Finance and Insurance	6,465	170,637	3.8%	3.9%	
Real Estate	740	18,724	4%	4.8%	
Professional, Scientific and Technical Activities	3,306	107,294	3.1%	4.8%	
Administrative and Support Activities	27,742	181,400	15.3%	10.8%	
Education	242	52,552	0.5%	0.5%	
Human Health and Social Services	3,262	57,560	5.7%	4.9%	
Culture, Art, Entertainment, Leisure and Sports	224	9,696	2.3%	2.9%	
Other Service Activities	2,479	29,942	9.9%	5.5%	
Total	125,229	2,636,628	4.7%	5.1%	

Source: LMDS, 2014.

TABLE 15 -NET EMPLOYMENT EXPECTATIONS BY OCCUPATION, ISTANBUL 2014

Occupation Group	Istanbul		Turkey	
	Net Employment Change for June 30, 2015	Total Number of Employees	Percentage of Net Employment Change for June 30, 2015	Percentage of Net Employment Change for June 30, 2015
Office Services	11,836	354,467	3.3%	3.4%
Service and Sale Staff	29,551	377,375	7.8%	7.2%
Occupations not requiring any qualification	19,841	455,013	4.4%	5.1%
Skilled Agriculture, Forestry and Fisheries Workers	-36	3,803	-1%	2.9%
Professional Occupations	11,010	323,296	3.4%	3.2%
Artisanship and Related Works	19,664	377,022	5.2%	6.8%
Technicians, Mechanics and Supportive Professional Occupations	13,923	254,269	5.5%	4.5%
Establishment and Engine Operators	18,520	373,966	5%	5.3%
Management	920	117,416	0.8%	0.5%
Total	125,229	2,636,628	4.7%	5.1%

Source: LMDS, 2014

TABLE 16 – WOMEN'S SHARE IN EXPECTED EMPLOYMENT INCREASE BY SECTOR

Sector	Net Employment Change	Percentage of Women	Expected Increase in the Female Employment
<b>ISTANBUL</b>			
Mining and Quarrying	381	0.17	65
Manufacturing	30,437	0.29	8,753
Electric, Gas, Vapour and Acclimatisation Production and Distribution	91	0.23	21
Water Supply; Sewage and Waste Management and Enhancement Activities	281	0.04	11
Construction	20,006	0.10	1,945
Wholesale and Retail Trade; Repair of Motor Land Vehicles and Motorcycles	17,597	0.33	5,754
Transportation and Storage	3,925	0.27	1,055
Boarding and Food Services	5,093	0.35	1,763
Information and Communication	2,959	0.34	1,017
Finance and Insurance	6,465	0.47	3,006
Real Estate	740	0.26	192
Professional, Scientific and Technical Activities	3,306	0.44	1,468
Administrative and Support Activities	27,742	0.37	10,380
Education	242	0.56	137
Human Health and Social Services	3,262	0.62	2,037
Culture, Art, Entertainment, Leisure and Sports	224	0.28	62
Other Service Activities	2,479	0.43	1,062
<b>TOTAL</b>	<b>125,229</b>		<b>38,727</b>
Percentage of Female Employment in the Total Increase			31%

Source: Derived from LMDS, 2014.

**TABLE 17 – WOMEN'S SHARE IN EXPECTED EMPLOYMENT INCREASE  
BY OCCUPATION**

Occupation Groups	Net Employment Change	Percentage of Women	Expected Increase in the Female Employment
<b>ISTANBUL</b>			
Office Services	11,836	0.48	5,656
Service and Sale Staff	29,551	0.30	8,992
Occupations not requiring any qualification	19,841	0.40	7,894
Skilled Agriculture, Forestry and Fisheries Workers	-36	0.05	-2
Professional Occupations	11,010	0.42	4,650
Artisanship and Related Works	19,664	0.15	2,935
Technicians, Mechanics and Supportive Professional Occupations	13,923	0.26	3,585
Establishment and Engine Operators	18,520	0.20	3,660
Management	920	0.31	285
<b>TOTAL</b>	<b>125,229</b>		<b>37,656</b>
Percentage of Female Employment in the Total Increase			%30

*Source: Derived from LMDS, 2014.*

20 occupations for which, according to detailed job definitions, highest rates of employment growth are expected (Table 19) are mostly the same with those in which vacancies are concentrated and there are difficulties with recruitment. 10 occupations in total in Istanbul make it to the top 20 of the lists of vacancies; difficulty in recruitment and expected employment growth. These are: security guard, cleaning, sales consultant, manual works (general), waiter, sewing machine operator, call centre operator, cooking assistant, dish washer and warehouse carrier. In occupations that satisfy the criteria mentioned above, the present rates of female employment can be assessed together with employers' gender preferences to identify occupations with the highest potential for women's employment. This issue will be addressed in the following part of the report.

TABLE 18 - OCCUPATIONS WITH EXPECTED INCREASE IN EMPLOYMENT, İSTANBUL, 2014

Occupations with Expected Increase in Employment by June 30, 2014	Occupations with Expected Increase in Employment by June 30, 2015
Operator (Sewing Machine)	Security
Security	Cleaning Staff
Cleaning Staff	Sales Consultant
Call Centre Staff	Banking Professionals
Marketing Staff	Manual Worker (Construction)
Sales Consultant	Manual Worker (General)
Manual Worker (General)	Marketing Staff
Construction Staff Moulder (Manual)	Waiter
Private Security Guard and Bodyguards	Operator (Sewing Machine)
Manual Worker (Construction)	Call Centre Staff
Handling (Textile)	Superintendent and Foreman (Construction)
Plasterer	Customer Representative
Electrician (General)	Assistant Cook
Waiter	Driver/Carrier
Stage Actor/Actress	Steward
Manufacture Worker	Warehouse Porter
Other Metal Plate and Metal Construction Workers	Tiller
Driver/Carrier	Sales Representative / Door-to-door Salesman
Moulder/Press	Plastic Injection Production Staff
Manual Worker/Building Construction	Electrician (General)

Source: LMDS, 2014

#### 4.5. Jobs with the Highest Employment Potential for Women

By using some important criteria observed on the basis of LMDS Istanbul data, occupations that have potential in increasing women's employment can be identified. Further, these occupations can be evaluated with respect to difficulties in recruitment and it can be considered whether there is a necessity to intervene through İŞKUR's vocational training programmes (Memiş, 2015).

In this context, the following criteria were used in Tables 20 and 21 below in assessing occupations with the potential to boost women's employment:

- Occupations in which difficulty in recruitment (ODR) and expectations of employment growth are concentrated together (i.e. suggesting that demand for labour will be strong);
- Occupations in which preference for female labour is significant or no gender preference is made (i.e. gender discrimination is not a factor affecting demand);
- Occupations in which the cause of ODR is occupational competency and some basic skills (like communication) rather than wages or working conditions (thus with the potential to satisfy decent work criteria and to be supported by İŞKUR's vocational training courses )

For example, ‘sewing machine operator’ which is at the top of the list in both Table 20 and 21 ranks first as the occupation in Istanbul in which vacancies are concentrated and also there is 6.4 percent difficulty in recruitment for vacant jobs. It ranks 9<sup>th</sup> among occupations with an expected net increase in employment. As a result, it can be defined as a job for which demand is the strong. Presently, about one-third (34.35%) of persons employed in this job are women and employers’ preferences in filling in vacancies in this job is neutral by almost 90%. If the existing rate of women in the profession were to be maintained, it can be said that 1,701 women will be employed in the total of 4,953 vacancies. Furthermore, if the preference of those employers saying ‘gender does not matter’ were to be directed towards women, there will emerge the potential of employing women in 4,775 of the vacancies. To sum up, interventions favouring women through vocational training, job counselling and job placements may ensure that 3,073 additional job opportunities in this occupation are offered to women.

It seems possible to employ women in 10,762 jobs out of a total of 33,416 jobs in the first 20 occupations in which vacant jobs are concentrated and, furthermore, 12,488 jobs can be offered to women given that there is preference neutrality with respect to gender. If this can be done, then 69.6% of total jobs (23,251 jobs) in the first 20 occupations with higher vacancies will go to women and the share of women in employment will increase.

According to these criteria, in occupations with higher potential for women’s employment, the following come after sewing machine operator: ‘Sales consultant’, ‘cleaning worker’, ‘manual worker’, ‘waiter’ ‘call centre staff’, ‘presser’, ‘customer representative’, ‘steward’, ‘carrier’, ‘plastic injector production worker’, ‘overlock machine operator’, ‘assistant cook’, ‘security guard’, and ‘packing and handling.’ About one-third of these (‘manual worker’, ‘packing and handling’ ‘waiter’, ‘steward’) consist of jobs that do not require any specific qualifications and requirements for vocational training, experience or on-the-job training are very low. In fact, the reasons for facing difficulty in filling these jobs are mainly ‘low wages offered’ and ‘unfavourable working conditions’. For the remaining jobs, on the other hand, the difficulty is related to the limited number of workers available with necessary skills/qualifications/experience. Given this, ‘machine operator’, ‘sales consultant’, ‘call centre staff’, ‘customer representative’, ‘carrier’, ‘overlook machine operator’, ‘assistant cook’ and ‘security guard’ come to the fore as occupations that have the potential for creating decent jobs for women and that can be supported by İSKUR’s vocational training and job counselling services.

TABLE 19 - POTENTIAL FOR INCREASE IN WOMEN'S EMPLOYMENT IN THE TOP 20 OCCUPATIONS WITH HIGHEST NUMBERS OF VACANCIES

Occupations with the Highest Number of Vacancies	Perc. (%)				Gender Preference (%)				Expected Change	
	Male	Female	Number of Vacant Jobs	Percentage of Vacant Jobs (%)	Female	Male	Indiffer-ent	Potential	In Case of Preserving Current Rates	Difference
<b>Operator (Sewing Machine) (6,4)</b>	65.65	34.35	4,953	5.83	6.54	3.6	89.86	4,775	1.701	3,073
<b>Manual Worker (General) (2,3)</b>	70.56	29.44	3,200	4.39	14.84	40.15	45.01	1,915	942	973
<b>Sales Consultant (3,8)</b>	63.23	36.77	2,738	3.76	32.8	3.53	63.67	2,641	1.007	1,635
<b>Warehouse Porter (1,4)</b>	99.07	0.93	2,525	3.47	5.77	93.13	1.1	173	23	150
<b>Driver/Carrier (1,2)</b>	99.9	0.1	2,249	3.09	3.29	95.74	0.97	96	2	94
<b>Waiter/Waitress (3,1)</b>	78.81	21.19	2,012	2.76	0	32.13	67.87	1,366	426	939
<b>Cleaning Staff (2,0)</b>	40.26	59.74	2,011	2.76	13.06	11.18	75.76	1,786	1,201	585
<b>Call Centre Staff (1,6)</b>	36.25	63.75	1,587	2.18	31.91	0	68.09	1,587	1,012	575
<b>Plastic Injection Production Staff (0,9)</b>	83.88	16.12	1,325	1.82	3.6	38.45	57.95	816	214	602
<b>Security (2,5)</b>	95.16	4.84	1,266	1.74	0	58.18	41.82	529	61	468
<b>Packing Worker (Manual)</b>	44.35	55.65	1,219	1.67	67.55	6.41	26.04	1,141	678	462
<b>Ironer (1,3)</b>	78.25	21.75	1,178	1.62	10.1	15.08	74.82	1,000	256	744
<b>Steward (1,3)</b>	31.18	68.82	1,109	1.52	10.68	15.32	74	939	763	176
<b>Handling (Textile) (1,3)</b>	51.5	48.5	984	1.35	1.41	15.35	83.24	833	477	356
<b>Bellboy (1,3)</b>	90.8	9.2	941	1.29	0	49.71	50.29	473	87	387
<b>Packer (Manual)</b>	39.27	60.73	924	1.27	48.57	0	51.43	924	561	363
<b>Customer Representative</b>	43.32	56.68	901	1.24	4.97	1.19	93.84	890	511	380
<b>Overlock Machine Operator</b>	29.43	70.57	826	1.13	21.13	3.36	75.51	798	583	215
<b>Assistant Cook (1,1)</b>	65.43	34.57	740	1.02	0	23.29	76.71	568	256	312
<b>Credit Card Marketing Staff</b>	100	0	728	1	0	100	0	0	0	0
<b>TOTAL</b>	55.29	33,416	44.92	13.54	31	55.46	23,251	10,762	12,488	

TABLE 20 - POTENTIAL FOR INCREASE IN WOMEN’S EMPLOYMENT IN OCCUPATIONS WITH HIGHEST NUMBERS OF VACANT JOBS AND EXPECTATION FOR NET EMPLOYMENT INCREASE

Vacant Jobs	Jobs with Expected Increase in Employment					Total Employment Potential				
	Potential	In Case of Preserving Current Rates	Difference	Net employment expectation	Potential	In Case of Preserving Current Rates	Difference	In Case of Preserving Current Rates	Total Potential	Total Difference
Operator (Sewing Machine)	4,775	324	4,451	4,656	4,488	1,599	2,889	1,923	9,263	7,340
Sales Consultant	2,641	898	1,743	7,381	7,121	2,714	4,407	3,612	9,762	6,150
Manual Worker (General)	1,915	475	1,440	4,650	2,783	1,369	1,414	1,844	4,698	2,854
Cleaning Staff	1,786	263	1,524	789	701	471	229	734	2,487	1,753
Call Centre Staff	1,587	506	1,081	1,619	1,619	1,032	587	1,538	3,206	1,667
Waiter/waitress	1,366	0	1,366	2,181	1,481	462	1,018	462	2,846	2,384
Packing Worker (Manual)	1,141	823	317	997	933	555	378	1,378	2,074	696
Ironer	1,000	119	881	440	373	96	278	215	1,374	1,159
Steward	939	118	821	1,586	1,343	1,092	252	1,210	2,282	1,072
Packager (Manual)	924	449	475	1,019	1,019	619	400	1,068	1,943	875
Customer Representative	890	45	845	302	298	171	127	216	1,189	973
Handling (Textile)	833	14	819	15,440	13,070	7,488	5,581	7,502	13,903	6,401
Plastic Injection Production Staff	816	48	768	1,214	747	196	552	243	1,563	1,320
Overlock Machine Operator	798	175	624	1,233	1,192	870	322	1,045	1,990	945
Assistant Cook	568	0	568	1,576	1,209	545	664	545	1,777	1,232
Security	529	0	529	501	209	24	185	24	739	715
<b>TOTAL</b>	<b>22,508</b>	<b>4,256</b>	<b>18,252</b>	<b>45,585</b>	<b>38,587</b>	<b>19,304</b>	<b>19,283</b>	<b>23,560</b>	<b>61,095</b>	<b>37,535</b>

## PART 5. – CONCLUSION AND SUGGESTIONS

Going over Istanbul related data from the İŞKUR LMDS and TURKSTAT HLFS from a gender perspective, the following findings may be summarised:

1. In Istanbul, while there are about 2 million women who are presently not part of the labour market, but are at working ages and can start working, as well as about a half million unemployed people, the number of vacant jobs is less than 100,000. The fundamental problem is the shortage of demand. The effective solution to this problem lies in private and public investments to induce demand and macroeconomic growth policies that can create employment.
2. In Istanbul, about 60% of women at working ages participate in the labour market at some point in their lives, but this is not sustained. More than half of women with low education status join the labour market while they are still unmarried but withdraw after getting married and having children. When women are concerned, the weak attachment to the labour market is a problem even more serious than obstacles to their entry to the market.
3. In this context, the importance of constraints on women's labour supply should also be considered besides the shortage in demand. It was found in the context of workplaces covered by the survey that the very limited availability of childcare or transportation services and requirements such as overtime work and ability to travel are all factors which affect the female labour supply negatively. Hence, there is need for interventions that remove these constraints and support the work-life balance which in turn require some legal and institutional mechanisms. Care services lead the list of necessities in this regard. The care services sector including early childhood care and preschool education (kindergartens and infant classes) as well as services for the elderly, disabled and sick care should be encouraged through public investments.
  - It should be kept in mind that public investments in the social care services sector will bring along at least a partial solution to the problem of insufficient demand mentioned above. Public investments in institutional services for children, the elderly, disabled and sick care constitute a strategy that will both ease constraints on the supply side and generate employment at the same time.
  - In this context, employment profiles, vacancies and ODR statuses of workplaces extending care services should be examined on the basis of LMDS and it should be assessed whether they can also serve as a platform for vocational trainings.
4. It was found that gender-based occupational segregation is quite strong in the labour market. Women concentrate in fewer occupations compared to men. There are many occupational branches (almost half of 2,961 occupations in Istanbul identified at the point of occupation-sector intersection) that are fully dominated by men; that is they are closed to women from the outset. The Gender Segregation Index calculated on the basis of disaggregated job definitions is 49.6%. This means that half of men and women would have to change their respective places for an equal distribution of men and women to jobs. Occupational segregation observed on the basis of detailed job definitions is much stronger than that observed on the basis of occupation groups. In other words, as distinct from

TURKSTAT data, LMDS data sheds light on how strong occupational segregation is thanks to its detailed job definitions.

- One of the causes of unequal gender distribution of occupations is on the demand side. For the first time in Turkey, An effort was made to find out to what extent this segregation stems from the demand side by questioning employers' gender preferences for vacant jobs on the basis of a countrywide representative sample under the LMDS survey. The fact that employers prefer men for one-third of vacant jobs while female preference is 10 percent indicates that the impact of the demand side is indisputable in occupational segregation.
- Meanwhile, the fact that employers do not have any specific gender preference for almost half of vacant jobs makes for a potential for boosting women's employment.
- Beyond gender discrimination on the demand side, some factors behind gender segregation in the distribution of jobs are long working hours and the absence of childcare and other social services that make it difficult for women to strike a balance between work and life. Thus, measures supporting the work-life balance will contribute to reducing occupational segregation.
- Occupational segregation is an important problem since it may lead to many other problems including low rates of employment for women, high rates of unemployment, wage gaps and vertical segregation.

5. By using some important criteria suggested by the LMDS data, areas with relatively stronger potential for creating jobs for women have been identified and it is suggested that women's employment in these areas can be supported through relevant vocational training programmes, job counselling and job placements. These areas are:

- where vacant jobs, ODRs and expectations of employment growth are concentrated together (i.e. suggesting that the demand for labour will be strong);
- where preference for female employees is stronger or where no specific gender preference exists (i.e. gender preference is not a problem on the demand side);
- where the cause of ODR is occupational competency or some required skills (i.e. in communication) rather than the low wage rate or working conditions.

In this context, sewing machine operator, sales consultant, call centre operator, customer representative, presser, carrier, overlock machine operator and security guard are the most promising occupations.

6. Meanwhile, it is also important that strategies radically transforming established gender roles are pursued while women are oriented to various occupations through İŞKUR's vocational training courses, counselling and job placement services. There are some occupations and jobs that are conceived as “male” but entail no concrete obstacles to female employment including the physical abilities required. For example, training programmes targeting women may be launched for women such jobs as “security guard”, “driver” or “counter operator” in which men are dominant.

7. Above the launching of vocational courses to supply internationally qualified employees to the sector of care services (child, sick and elderly care, teaching assistant, etc.) was suggested. While addressing the issue, it should be considered that such courses should be available not only to women but also men and employment in this area should be encouraged for men as well. Vocational training programmes coordinated jointly by the İŞKUR, Ministry of National Education and the Board for Higher Education (YÖK) in teaching and care services should be envisaged at high school and higher education levels as well.
8. The point of this study which is specifically relevant to the Ministry of Labour and Social Security (MoLSS) is the importance of regulating the labour market in efforts geared towards increasing women's employment. Regulation measures should include the following: preventing gender discrimination in recruitment; ensuring the fulfilment of the obligation to provide childcare facilities; supervising working hours and shortening them in line with the principle of decent work; providing incentives to help workplaces to allow for the work-life balance and the introduction of female employment quotas and tax incentives in all enterprises including initially those in the public sector.

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