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İSDEP

SUPPORT FOR TRANSITION TO LABOR MARKET PROJECT

PROVINCE-BASED SOCIO-ECONOMIC SECTOR CURRENT SITUATION REPORT

İZMİR

REPUBLIC OF TÜRKİYE
MINISTRY OF LABOUR AND SOCIAL SECURITY

İŞKUR

TÜRK KIZILAY

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TÜRK KIZILAY
COMMUNITY-BASED MIGRATION PROGRAMS
SOCIO-ECONOMIC EMPOWERMENT PROGRAM

SUPPORT FOR TRANSITION TO LABOR MARKET PROJECT PROVINCE-BASED SOCIO-ECONOMIC SECTOR CURRENT SITUATION REPORT

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PROVINCE-BASED SOCIO-ECONOMIC SECTOR CURRENT SITUATION REPORT

(İZMİR)

T.C. ÇALIŞMA VE SOSYAL GÜVENLİK BAKANLIĞI

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ABBREVIATIONS

BAG-KUR : Independent Employees Social Security Institution

GDP : Gross Domestic Product

ISKUR : Turkish Employment Agency

IPSHA : International Protection Status Holders andApplicants

IZBAS : İzmir Free Trade Zone

IZKA : İzmir Development Agency

KOSGEB : Small and Medium Enterprises Development Organization

NACE : Statistical Classification of Economic Activities of the European Community

OIZ : Organized Industrial Zone

R&D : Research and Development

SEGE : Ministry of Industry Socio-Economic Development Index

SSI : Social Security Institution

SuTP : Syrians under Temporary Protection

TURKSTAT : Turkish Statistical Institute

INTRODUCTION

İzmir is a historically and economically important metropolis located in western Türkiye on the Aegean Sea coast. As the third largest city in the country, İzmir is one of the centers of both national and international economic activities with its developed industry, trade, logistics and tourism sectors. İzmir's deep-rooted history dating back to antiquity, being home to different civilizations and its identity as a dynamic port city make İzmir both culturally and economically important. Its mild climate, fertile agricultural lands and strong industrial infrastructure make the city an attractive place to live and invest.

From an economic perspective, Izmir stands out as one of Türkiye's key export hubs, driven by prominent sectors such as industry, trade, logistics, and agriculture. The city is one of the largest commercial and industrial centers in the Aegean Region and has the advantage of opening up to world markets thanks to its port. The automotive, textile, chemical, food, renewable energy and technology sectors are the main drivers of İzmir's economy. At the same time, major educational institutions such as Ege University, Dokuz Eylül University and İzmir Institute of Technology play a critical role in meeting the city's need for a qualified workforce. In terms of tourism, İzmir hosts important destinations such as Çeşme, Alaçatı, Ephesus and Bergama, and welcomes millions of visitors every year with its cultural heritage, marine tourism and gastronomy.

This dynamic structure and strategic location directly shape İzmir's labor market, industrial infrastructure and economic potential. Accordingly, the İzmir Socio-Economic Sector Current Situation Report comprehensively addresses the socio-economic structure of the province, the current situation statistic by sectors and the dynamics of the labor market. The report consists of five main sections: Literature Review, Secondary Data Analysis, Survey Findings, Findings of In-Depth Interviews, General Evaluation and Policy Recommendations.

In the literature review, existing academic studies and sectoral reports on İzmir were reviewed, and the main dynamics of the province's industry, trade, service and agriculture sectors and the labor market were reviewed. From the employers' perspective, the focus was on unemployment, the impact of migrant workers on the labor market, vocational training and the role of digital transformation on employment.

In the secondary data analysis, population, labor force and employment statistic, social security dynamics and migration movements for İzmir were examined in detail in line with data from official institutions such as TURKSTAT, ISKUR, SSI, Ministry of Labor and Social Security and Presidency of Migration Management.

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Fieldwork included in-depth interviews with sector representatives and stakeholders in İzmir, as well as surveys (64) with employers and employees to generate a broader data set. The findings of these studies are discussed in detail in the third section of the report. The fourth section then presents the findings of the in-depth interviews.

In the final section, policy recommendations and strategies for the development of the labor market in İzmir are reviewed in light of all the data obtained, and various recommendations are presented to promote sustainable employment and improve labor market integration processes.

The İzmir Socio-Economic Sector Current Situation Report provides a comprehensive framework for decision-makers and stakeholders who play an active role in employment processes to understand the structure of the labor market and make strategic directions. In particular, public institutions, private sector representatives and academia who want to increase integration into the labor market will have the opportunity to evaluate the prominent sectors of İzmir, employer expectations and effective methods that can be followed in job placement processes.

In this context, the report aims to provide an important resource for politicians, industry and trade representatives, investors and academia by analyzing the socio-economic structure of İzmir in detail. It also aims to contribute to sustainable development and growth processes by providing strategic road maps for more effective utilization of regional economic potential.

> **“This report aims to provide a comprehensive resource on İzmir’s labor market by presenting the province’s current socioe-conomic dynamics for policymakers, business representatives, and the academic community.”**

CHAPTER I

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CHAPTER I

1. LITERATURE REVIEW - ANALYSES ON DEMOGRAPHIC, SOCIO-ECONOMIC STRUCTURE AND LABOR AND EMPLOYMENT SITUATION İZMİR

İzmir is an important port city in western Anatolia with a history dating back 8500 years. Known as Smyrna in ancient times, the city has been home to great civilizations such as the Hittites, Ionians, Lydians, Persians, Romans and Ottomans. As one of the most important cultural and commercial centers of antiquity, İzmir developed as an important trade center during the Ottoman period and created a strong economic structure in the fields of industry, tourism and agriculture in modern Türkiye.

İzmir's socio-economic structure is highly dynamic, with industry, trade, agriculture and tourism sectors being the determining factors in the city's economic growth. The city hosts major industrial zones such as Aliağa Petrochemical Facilities, İzmir Free Zone (İZBAŞ), Atatürk Organized Industrial Zone and has a share of 7.5-8 percent in Türkiye's total exports. The agricultural sector also plays an important role in İzmir's economy. Agricultural products such as olives, grapes, figs, tobacco and cotton have a large share in both the domestic market and exports. In addition, historical and touristic sites such as Ephesus and Bergama, and popular holiday resorts such as Çeşme and Alaçatı are among the important factors that increase İzmir's tourism revenues.

İzmir's demographic structure is one of the factors supporting the city's economic and social development. As of 2023, İzmir's population was recorded as 4,462,056 people, making it the third most populous city in Türkiye. While 92 percent of the city's population lives in the city center, 8 percent live in rural areas. Since İzmir is an immigrant city, its population growth rate is above Türkiye's average.

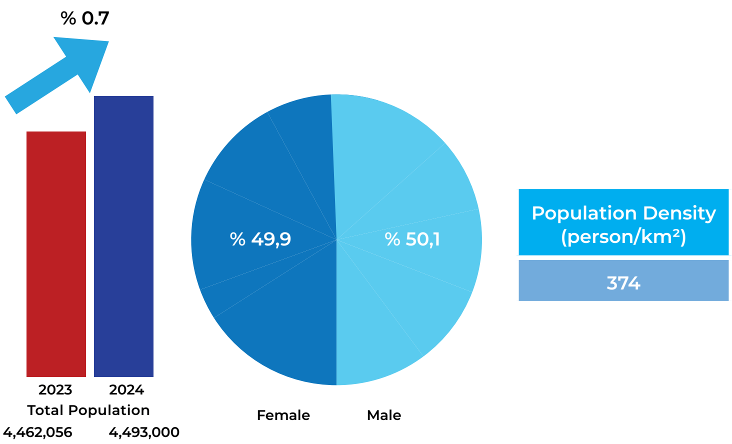
In terms of its place in the Turkish economy, İzmir is one of the country's largest commercial and industrial centers. By 2023, İzmir's contribution to gross domestic product (GDP) was 6.5 percent. The city's exports amounted to USD 20.1 billion in 2023, with the largest export sectors being automotive, machinery, chemicals, food and textiles. İzmir's logistics infrastructure and port facilities play a critical role in Türkiye's foreign trade. İzmir Port is the third largest port in Türkiye and operates as a strategic hub for international trade. İzmir also has eight organized industrial zones, two free zones, and three technoparks, which are particularly conducive to increased investments in technology and industry . Sectors such as renewable energy, logistics, and technology entrepreneurship are among the key areas that will drive İzmir's future growth. The city has significant strength in the industrial, trade and service sectors and is one of the few cities with an export surplus. While the industrial and manufacturing sectors form the backbone of İzmir's economy, the agriculture and tourism sectors play a complementary role. The city has a strong employment capacity and has great potential in the labor market.

İzmir has a critical place in the Turkish economy with its historical heritage, industrial infrastructure, logistical advantages and strong agricultural sector. Its strong industrial, trade, tourism and agricultural sectors make it one of Türkiye's foreign trade and industrial centers. In the future, İzmir is expected to receive more investment in renewable energy, logistics and technology. In this context, developing policies to strengthen İzmir's economic structure will further enhance the city's role in the Turkish economy.

Table 1. Demographic Overview of İzmir

Category	Value
Total Population (2023)	4.462.056
City Population (%)	96
Rural Population (%)	4
Young Population (0-14 Years) (%)	19,5
Employable Population (Age 15-64) (%)	68,8
Elderly Population (Age 65+) (%)	11,7
Female Population (%)	50,1
Male Population (%)	49,9

Graphic 1. Demographic Overview of İzmir Province



Source: TURKSTAT, 2023

1.1 Effects of Regional, Cultural and Economic Factors

İzmir's regional cultural and economic factors are shaped by the city's historical background, geographical location and economic dynamics. The city has been under the influence of different civilizations throughout history, which has led to the development of cultural diversity. İzmir, which was part of the Ionian culture in antiquity, developed as an important port city during the Hellenistic, Roman, Byzantine and Ottoman periods and thus had a cosmopolitan structure. This historical diversity is directly reflected in İzmir's art, literature, cuisine and lifestyle. The city is considered to be one of the most modern and integrated with the West in Türkiye, and is notable for its open-minded and modern character.

In terms of regional economic factors, İzmir is one of the largest industrial and commercial centers in Türkiye and plays a strategic role in international trade as a port city. As the largest trade center in the Aegean Region, the city is supported by a well-developed manufacturing and service sector. İzmir's industrial infrastructure is strengthened by organized industrial zones and technology development centers, and is home to major investments, particularly in the petrochemical, automotive, textile, food and renewable energy sectors. The İzmir Free Zone and the industrial zones in Aliağa are an attractive production and export center for both domestic and foreign investors.

Geographical location and climate factors also play a decisive role in İzmir's economic structure. Having a Mediterranean climate, the city has a very favorable structure for agricultural production. Products such as olives, grapes, figs, tobacco and cotton ensure that İzmir has an important place in both domestic and foreign trade. In addition, in terms of sea tourism, holiday resorts such as Çeşme, Alaçatı and Foça contribute greatly to the economic structure of İzmir. The tourism sector attracts thousands of local and foreign tourists every year thanks to the natural beauties and historical heritage of the region.

The impact of regional cultural factors on economic development is also directly related to İzmir's human resources and lifestyle. İzmir has a population with a high level of education and entrepreneurial potential. The innovative business environment supported by universities, research centers and technoparks contributes to the city's economic growth. In particular, institutions such as İzmir Institute of Technology, Ege University and Dokuz Eylül University are important education and research centers that support İzmir's industrial and technological progress. In addition, İzmir's social structure, combined with an open-minded and innovative society, has created an ecosystem that encourages entrepreneurship.

One of the most prominent reflections of regional economic factors is İzmir's logistical advantage. The city is located at a strategic point in terms of both land and sea transportation and is an important center of international trade thanks to the Port of İzmir, the third largest port in Türkiye. Direct exports from İzmir to Europe, Asia and Africa are possible, accelerating the integration of İzmir's economy into global markets. In addition, İzmir's advanced transportation network contributes to the growth of the logistics sector by ensuring coordination between industrial zones and ports.

Table 2. İzmir City Profile: Key Statistics

Indicators	Value	Share in Türkiye (%)	Provincial Ranking
Province area (km²)	11,891	1,52	23
Gross domestic product (GDP) at current prices (Thousand TL) (2021)	462,151,823	6,38	3
Industrial GDP at current prices (BCDE) (Thousand TL) (2021)	148,873,457	7,88	3
Manufacturing GDP at current prices (C) (Thousand TL) (2021)	129,850,123	8,07	3
GDP per Capita (USD) (2021)	11,668		6
Exports (Thousand USD) (2021)	14,737,269	6,54	2
Imports (Thousand USD) (2021)	10,956,663	4,04	4
Foreign trade balance (Thousand USD) (2021)	3,780,606		1
Ratio of exports to imports (%) (2021)	134,51		49
Total deposits (Million TL) (2021)	283,205	5,75	3
Total loans (Million TL) (2021)	237,444	5,4	3
Loans/deposits (%) (2021)	83,84		54
Number of incentive certificates (Number) (2021)	681	5,35	3
Fixed investment amount with incentive certificate (Million TL) (2021)	14,950	5,44	4

Source: TURKSTAT 2021 Report

As can be seen from the table, İzmir is Türkiye's third largest economic center, with significant strength in industry, trade and services. In terms of economic indicators, İzmir makes significant contributions to the Turkish economy. İzmir's gross domestic product is 462.1 billion TL at current prices, which is 6.38 percent of Türkiye's total economic size. The industrial sector accounted for TL 148.8 billion of the total GDP, while GDP in the manufacturing sector was calculated as TL 129.8 billion. The manufacturing sector has a strong presence in İzmir's economy and contributes directly to the city's economic growth. GDP per capita is USD 11,668, which ranks İzmir sixth in Türkiye.

İzmir is also in a strong position in terms of foreign trade. In 2021, İzmir's exports amounted to 14.7 billion USD, accounting for 6.54 percent of Türkiye's total exports. Imports amounted to USD 10.9 billion, accounting for 4.04 percent of Türkiye's total. İzmir's foreign trade balance recorded a surplus of 3.78 billion USD, making it the province with the highest foreign trade surplus in Türkiye. This data shows that İzmir is a net exporter and has a competitive position in foreign trade. The ratio of exports to imports is 134.51 percent, ranking 49th in Türkiye. High export capacity stands out as one of the most important factors supporting İzmir's economic growth.

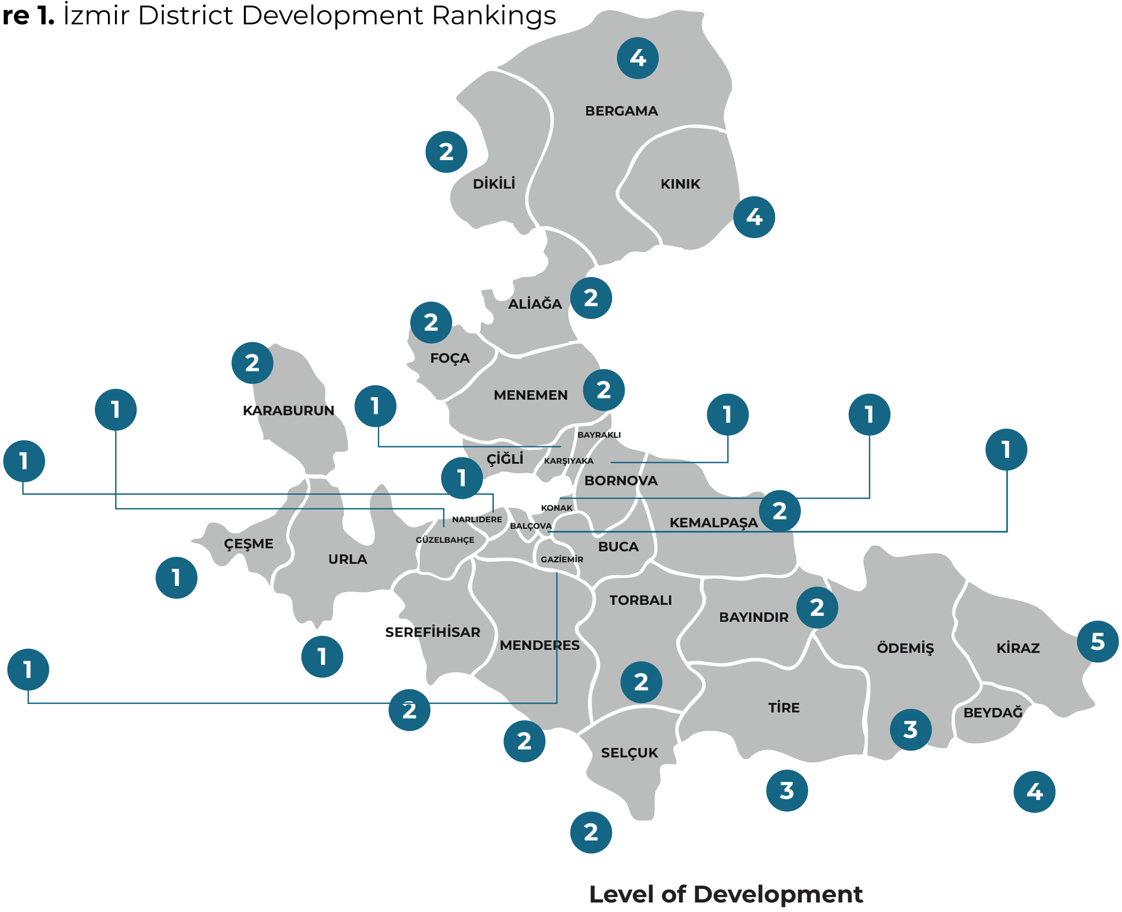
In terms of financial indicators, İzmir is not one of the largest financial centers in Türkiye, but it has significant economic power. Total deposits amounted to TL 283.2 billion, accounting for 5.75 percent of Türkiye's total. Total loan volume in İzmir is TL 237.4 billion, accounting for 5.40 percent of Türkiye's total. The loan-to-deposit ratio is 83.84 percent, which ranks 54th in Türkiye. This indicates that more investment and incentive mechanisms need to be developed in İzmir to utilize financial resources.

İzmir's investment potential is also noteworthy. In 2021, the number of investments with incentive certificates was 681, with a share of 5.35 percent in Türkiye. The amount of fixed investments with incentive certificates was calculated as 14.95 billion TL and İzmir ranked fourth in Türkiye with a share of 5.44%. Incentivizing industrial and manufacturing investments is critical to sustaining İzmir's economic growth.

Overall, İzmir continues its economic growth as one of Türkiye's largest industrial and commercial centers. The city is one of the few provinces with a foreign trade surplus and contributes significantly to the Turkish economy with its strong industrial and service sectors. However, more efficient use of financial resources and increased investments in technology and renewable energy sectors are among the strategies to accelerate İzmir's economic growth. The low population growth rate, low credit utilization rates and regional development stand out as issues where investment incentives need to be increased. With its industrial infrastructure, logistics opportunities and tourism potential, İzmir will continue to make significant contributions to Türkiye's future economic growth.

With its industrial strength, trade surplus, and investment potential, İzmir is progressing toward becoming a strategic hub for Türkiye's sustainable economic growth.

Figure 1. İzmir District Development Rankings



The table shows the socio-economic development levels of İzmir's districts as of 2022. Districts are ranked based on criteria such as economic activity, education, health, infrastructure, employment and quality of life. In general, İzmir's metropolitan districts are more developed, while districts with an economy based on industry and agriculture appear to be moderately developed, and rural areas less developed.

Konak, Bornova and Balçova are among the most developed districts of İzmir. While Konak ranks 11th among 973 districts in Türkiye, it ranks first in İzmir. The city's position as a commercial, cultural and business center has been effective in this ranking. Bornova and Balçova stand out as the regions where universities, trade and industrial activities are concentrated. Districts such as Karşıyaka, Çiğli, Gaziemir and Çeşme also rank high in the development ranking and are among the economically strong regions of İzmir (İzmir Provincial Directorate of Industry and Technology., 2021)

Bayraklı, Buca, Aliağa, Karabağlar, Kemalpaşa, Torbalı and Seferihisar are in the second tier in terms of socio-economic development. These districts generally have economies based on industry, logistics and agriculture. While Aliağa stands out with its industrial and refinery facilities, Torbalı and Kemalpaşa have an important place in industry and agriculture. However, these districts have lower levels of urbanization and quality of life compared to the first ranked districts. Districts such as Buca and Bayraklı, despite their high population density, did not score as high as the first ranked districts in terms of development.

Bergama, Ödemiş, Kınık, Bayındır, Beydağ and Kiraz are among the districts at the lower levels of development. Districts such as Bergama, Tire and Ödemiş have a lower level of development in terms of industry and trade due to their agriculture-based economies. These districts are generally rural areas with low urbanization rates and limited economic activities. Kınık, Bayındır, Beydağ and Kiraz are in the fourth and fifth development level and are among the least developed districts of İzmir.

Table 3. Breakdown of Industrial Employment by Employee Type

Employee Type	Türkiye Number of Employees	Türkiye Share (%)	İzmir Number of Employees	İzmir Share (%)	Share in Türkiye (%)
Engineer	174,209	4,17	13,166	4,75	7,56
Technician	137,529	3,29	11,618	4,19	8,45
Other Technical	69,138	1,65	7,223	2,6	10,45
Master	270,432	6,47	15,918	5,74	5,89
Worker	2,846,464	68,13	178,623	64,39	6,28
Skilled Worker	14,187	0,34	1,061	0,38	7,48
Apprentice	19,517	0,47	1,508	0,54	7,73
Subcontracted Worker	143,418	3,43	8.161	2,94	5,69
BAG-KUR	55,968	1,34	2.874	1,04	5,14
Administrative Staff	447,203	10,7	37,259	13,43	8,33
Total	4,178,065	100	277,411	100	6,64

Table 3 shows the distribution of those working in the industrial sector in İzmir by job type as of 2021. A total of 277,411 people are employed in the industrial sector in İzmir, equivalent to 6.64 percent of the 4,178,065 industrial workers in Türkiye. İzmir has a significant share in Türkiye's overall employment in the industrial sector and there is a higher concentration in some occupational groups than the Türkiye average.

Workers constitute the largest portion of industrial workers. While there are 2,846,464 workers in Türkiye, 178,623 workers in İzmir are employed in the industrial sector. The share of workers in industrial employment in İzmir is 64.39 percent. In Türkiye, 6.28 percent of all industrial workers are employed in İzmir. This ratio shows that İzmir has an important labor force resource in industrial production. While there are 270,432 people in the master category in Türkiye, 15,918 people in İzmir work in this category. Craftsmen in İzmir account for 5.74 percent of industrial employment and 5.89 percent of the total number of craftsmen in Türkiye. This ratio shows that İzmir has a strong position in occupational groups requiring technical skills in industry.

In the engineer category, 174,209 engineers are employed in Türkiye, while 13,166 engineers are employed in the industrial sector in İzmir. Engineers make up 4.75 percent of industrial employees in İzmir, while 7.56 percent of total engineers in Türkiye are employed in İzmir. İzmir's share in the employment of engineers is considerably higher than Türkiye's average, indicating that the branches of industry that require technical knowledge are well developed in İzmir. Similarly, İzmir has a share of 8.45 percent in the technician category, with 11,618 technicians working in the industrial sector. This ratio reveals that İzmir is an important center for meeting the need for intermediate staff with technical knowledge in industrial production.

While there are 69,138 people in the category of other technical personnel in Türkiye, 7,223 people are employed in İzmir. İzmir is home to 10.45 percent of total other technical employees in Türkiye. This ratio shows that İzmir is one of the prominent cities in Türkiye in terms of technical workforce. In the administrative staff category, there are 447,203 people across Türkiye, while in İzmir this figure is 37,259. The share of administrative staff in İzmir's industrial employment is 13.43 percent, while 8.33 percent of the total administrative staff in Türkiye is located in İzmir. This ratio shows that İzmir has a high concentration in Türkiye in terms of industrial management and administrative services.

In the categories of apprentices, journeymen, subcontracted workers and BAG-KUR employees, İzmir's share in Türkiye's industrial employment varies between 5 percent and 8 percent in general. In particular, apprentice and journeyman ratios are one of the areas that need to be evaluated in terms of the integration of vocational training into the industrial sector. The total number of apprentices and journeymen in İzmir is 1,508 and 1,061 respectively. These ratios indicate that the vocational education system needs to be more supportive of the industrial sector.

1.1.1 Agriculture and Livestock Sector

İzmir's agriculture and livestock sector has an important position in Türkiye thanks to the fertile soils and favorable climatic conditions of the Aegean Region. İzmir has a diverse structure in terms of both crop and animal production. The agricultural sector has developed in the city, supported by modern technologies and cooperative practices. In particular, agriculture-based industry and export-oriented production are the main pillars of İzmir's agriculture. 29.5% of İzmir's land is cultivable. Of the total 353 thousand 318 hectares of cultivable land, 48.1% consists of fields, 43.4% of fruits and spices, 8% of vegetables, and 0.5% of ornamental plants.

İzmir's agricultural production is characterized by high value-added products such as olives, grapes, figs, tobacco and cotton. İzmir's olive production is 168,914 tons, accounting for 9.72% of Türkiye's production. Grape production is 133,576 tons, 3.64% of the country's total, and fig production is 68,271 tons, 21.33% of total production.

İzmir produces grapes and olives intensively, especially in regions such as Kemalpaşa, Tire and Ödemiş, and has an important place in olive oil production. In addition, 115 thousand 104 tons of cotton is produced on an area of 248 thousand 526 decares. Bergama with 70 thousand 893 decares, Menemen with 62 thousand decares and Torbalı with 55 thousand 650 decares stand out in production.

İzmir is also one of the most developed provinces in Türkiye in terms of organic agriculture, with vegetables and fruit varieties among the main products grown and exported.

The livestock sector is well developed in İzmir and is one of the most important provinces in Türkiye in terms of milk production. İzmir is reported to be one of the largest milk production centers in the country and has a 5.8% share in bovine milk production. This rate indicates that İzmir's annual milk production is approximately 1.34 million tons. In terms of milk production and dairy farms, İzmir is concentrated in districts such as Tire, Ödemiş, Bergama and Bayındır. Large-scale milk production facilities and cooperatives operate in these regions. İzmir has a large share in Türkiye's total milk production and is an important center for the dairy industry. In addition to milk production, meat and egg production is also an important sector in the city.

Aquaculture also plays an important role in İzmir's agriculture and livestock sector. Fish farming in sea and inland waters is particularly concentrated in Çeşme, Karaburun and Seferihisar regions. İzmir is one of the largest aquaculture producers in Türkiye and has a strong position in terms of fish exports. This indicates that İzmir has a strong production capacity in both marine and freshwater fisheries.

Modern agricultural techniques and irrigation systems are becoming more widespread in İzmir in terms of the sustainability of agricultural production and livestock breeding activities. Mechanization and technological innovations in agriculture increase productivity and enhance İzmir's competitiveness in agricultural production. At the same time, factors such as climate change and diminishing water resources require the adoption of more sustainable practices in İzmir's agriculture and livestock sector. In particular, irrigation projects and alternative agricultural methods will be important factors determining the development of the sector in the future.

1.1.2 Industry and Manufacturing Sector

İzmir is one of Türkiye's largest production centers in terms of industry and manufacturing sector. Thanks to its large industrial zones, organized industrial areas, free zones and port facilities, İİzmir has the production capacity for both the domestic market and foreign trade. The most important components of the industrial sector include automotive, machinery, petrochemicals, textiles, food and renewable energy production. İzmir is the largest center of the Aegean Region in terms of industrial and trade activities and contributes significantly to Türkiye's total industrial production (TURKSTAT, 2023).

Industrial production in İzmir is generally concentrated in organized industrial zones and free zones. The city has eight organized industrial zones, two free zones and three technoparks (Izmir Development Agency, 2023). Aliağa is home to one of Türkiye's largest petrochemical plants and is an important production center for the refinery and chemical industries. İzmir Atatürk Organized Industrial Zone, Çiğli Organized Industrial Zone and Kemalpaşa Organized Industrial Zone are among the main regions where industrial production in the city is concentrated. İzmir Free Trade Zone (IZBAŞ) operates as an important logistics center for international trade.

İzmir's industrial sector accounts for a significant share of total GDP. As of 2021, İzmir's total GDP in the industrial sector is estimated at TL 148.8 billion, accounting for 7.88% of Türkiye's total industrial production. The share of the manufacturing sector in total GDP was determined as 129.8 billion TL, accounting for 8.07 percent of Türkiye's GDP (TURKSTAT, 2023). GDP per capita in İzmir is 11,668 USD and the industrial sector makes a major contribution to this economic size.

İzmir is one of the leading provinces in Türkiye in terms of industrial employment. A total of 277,411 people are employed in the industrial sector in İzmir. Workers constitute the largest share in industrial employment. A total of 178,623 workers are employed in the industrial sector in İzmir, making up 64.39 percent of the total number of industrial employees. Engineers make up 4.75 percent of total industrial employment with 13,166 people and technicians make up 4.19 percent with 11,618 people (ISKUR, 2022). İzmir draws attention with its high proportion of technical staff in industrial employment. In particular, the share of engineers and technicians in Türkiye's industrial employment is 7.56 percent and 8.45 percent, respectively (İzmir Provincial Directorate of Industry and Technology, 2021).

The automotive, machinery, chemical and food industries are prominent in İzmir's industrial and manufacturing sector. İzmir has a strong infrastructure in the automotive sub-industry and has significant investments especially in the spare parts and assembly industry. The machinery industry has a production capacity for both local and international markets and contributes significantly to İzmir's exports. The chemical industry is concentrated in the Aliağa region, and some of Türkiye's largest refinery and petrochemical production facilities are located in İzmir. The food industry is also one of İzmir's strongest sectors. Olive oil, milk and dairy products, bakery products and canned food production play an important role in İzmir's food industry.

Another important component of İzmir's industrial sector is renewable energy production. İzmir is one of Türkiye's leading provinces in wind power generation, accounting for around 15 percent of the total wind power generation capacity in Türkiye. Renewable energy investments contribute to İzmir's industrial and technological infrastructure in the long term and support its development in the green energy sector.

Logistics infrastructure and port facilities are critical to the future growth potential of İzmir's industrial and manufacturing sector. İzmir Port is the third largest port in Türkiye and plays a critical role in the export of industrial products. The port provides direct access to European, Asian and African markets, increasing İzmir's competitiveness in foreign trade. As of 2021, İzmir's foreign trade volume was USD 14.7 billion in exports and USD 10.9 billion in imports, making the city Türkiye's second largest export hub.

Overall, İzmir's industrial and manufacturing sector contributes significantly to the Turkish economy thanks to its strong infrastructure, large production capacity and advanced logistics facilities. The city has a strong industrial structure, particularly in the automotive, machinery, chemical, food and renewable energy sectors. Technology investments, R&D activities and the development of logistics infrastructure are of great importance for the sustainable growth of İzmir's industrial production. In the coming period, digital transformation and green energy investments in the industrial sector will increase İzmir's competitiveness in industrial production.

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Table 4. GDP Trends in Türkiye and İzmir by Sector

Year	Türkiye's Total GDP (Million TL)	Industrial GDP (Million TL)	Manufacturing GDP (Million TL)	Türkiye's Industrial GDP (%)	Manufacturing/ Türkiye GDP (%)	İzmir's Total GDP (Million TL)	İzmir's Industrial GDP (Million TL)	İzmir Manufacturing GDP (Million TL)
2016	2,626,560	514,902	435,890	19,6	16,6	158,937	37,325	33,013
2017	3,133,704	646,827	551,276	20,64	17,59	192,265	48,680	43,295
2018	3,758,774	837,564	715,797	22,28	19,04	236,098	64,926	57,086
2019	4,311,733	942,048	788,787	21,85	18,29	262,462	68,915	59,531
2020	5,048,220	1,149,840	965,942	22,78	19,13	307,395	83,883	71,871
2021	7,248,798	1,888,149	1,609,799	26,05	22,21	462,152	148,873	129,850
	Industry/ İzmir GDP (%)	Manufacturing/ İzmir GDP (%)	İzmir GDP/ Türkiye GDP (%)	İzmir Industry/ Türkiye Industry (%)	İzmir Manufacturing/ Türkiye Manufacturing (%)	İzmir GDP Ranking	İzmir Industry GDP Ranking	İzmir Manufacturing GDP Ranking
2016	23,48	20,77	6,05	7,25	7,57	3	3	4
2017	25,32	22,52	6,14	7,53	7,85	3	2	4
2018	27,50	24,18	6,28	7,75	7,98	3	3	4
2019	26,26	22,68	6,09	7,32	7,55	3	4	4
2020	27,29	23,38	6,09	7,3	7,44	3	2	4
2021	32,21	28,10	6,38	7,88	8,07	3	3	3

İzmir's economic development between 2016 and 2021 reveals a significant growth trend in the industrial and manufacturing sectors. According to the table, İzmir's total gross domestic product increased by 190.78 percent, from TL 158.9 billion in 2016 to TL 462.1 billion in 2021. Türkiye's overall GDP growth rate was 175.98 percent. This indicates that İzmir recorded a higher growth rate than Türkiye's average.

In terms of the industrial sector, İzmir's industrial GDP increased from TL 37.3 billion in 2016 to TL 148.8 billion in 2021, representing a growth rate of 298.86 percent. The growth rate of industrial GDP in Türkiye was 266.7 percent. İzmir's industrial sector grew faster than Türkiye's average, indicating that the province's industrial production capacity has increased. In the same period, İzmir's share in Türkiye's industrial GDP increased from 7.25% in 2016 to 7.88% in 2021. This ratio shows that İzmir has increased its importance in industrial production at the national level.

In terms of the manufacturing sector, İzmir's manufacturing GDP grew by 293.33 percent from TL 33.0 billion in 2016 to TL 129.8 billion in 2021. The total manufacturing GDP growth rate in Türkiye was 269.31 percent. İzmir's manufacturing sector has shown significant development, growing faster than the Turkish average. The share of İzmir's manufacturing sector in Türkiye's total manufacturing GDP increased from 7.57 percent in 2016 to 8.07 percent in 2021.

Looking at the shares of İzmir's industrial and manufacturing sectors in İzmir's GDP, the industrial sector accounted for 23.48 percent of İzmir's GDP in 2016, rising to 32.21 percent in 2021. Similarly, the manufacturing sector accounted for 20.77 percent of İzmir's GDP in 2016, rising to 28.10 percent in 2021. These increases show that the weight of İzmir's industrial and manufacturing sectors in economic growth is gradually increasing.

Overall, İzmir's industrial and manufacturing sectors grew faster than Türkiye's average between 2016 and 2021. The industrial sector has grown particularly strongly thanks to its large industrial zones, organized industrial areas and logistics facilities. The fact that İzmir ranks third and fourth in Türkiye's industrial and manufacturing rankings shows that the province has a high level of competitiveness, but has the potential to rise to higher ranks with more investment, R&D and innovation support. This growth trend in İzmir's industrial and manufacturing sectors constitutes a critical advantage for the province's economic sustainability

Table 5. Sectoral Breakdown of Industrial Enterprises in İzmir (2021)

Sectors (NACE Rev 2)	Türkiye Number of Enterprises	Share in Türkiye (%)	İzmir Number of Enterprises	Share in İzmir (%)	Sectoral Share in Türkiye (%)
Mining and Quarrying	5,055	3,39	146	1,82	2,89
Coal and Lignite Extraction	228	0,15	8	0,1	3,51
Crude Oil and Natural Gas Extraction	123	0,08	1	0,01	0,81
Metal Ores Mining	593	0,4	22	0,27	3,71
Other Mining and Quarrying	4,111	2,76	115	1,43	2,8
Manufacturing	139,507	93,66	7,714	96,11	5,53
Manufacture of Food Products	21,841	14,42	1,297	16,16	6,04
Manufacture of Beverages	550	0,37	43	0,54	7,82
Manufacture of Tobacco Products	95	0,06	30	0,37	31,58
Manufacture of Textile Products	11,752	7,89	241	3	2,05
Manufacture of Clothing	9,477	6,36	612	5,12	5,4

Table 5. Sectoral Breakdown of Industrial Enterprises in İzmir (2021)

Sectors (NACE Rev 2)	Türkiye Number of Enterprises	Share in Türkiye (%)	İzmir Number of Enterprises	Share in İzmir (%)	Sectoral Share in Türkiye (%)
Manufacture of leather and related products	2,714	1,82	278	3,46	9,35
Manufacture of wood, and Cork Products (Except Furniture)	6,284	4,22	174	2,17	2,77
Manufacture of paper and paper products	2,495	1,68	180	2,24	7,21
Printing and reproduction of recorded media	2,182	1,46	141	1,76	6,46
Manufacture of coke and refined petroleum products	239	0,16	33	0,41	13,81
Manufacture of chemicals and chemical products	4,698	3,15	372	4,63	7,92
Manufacture of basic pharmaceutical products	264	0,18	12	0,15	4,55
Manufacture of plastic and rubber products	10,845	7,04	553	6,89	5,27
Manufacture of other non-metallic mineral products	8,024	5,39	332	4,14	4,14
Basic metal industry	4,141	2,78	236	2,94	5,7
Manufacture of fabricated metal products	15,883	10,66	896	11,16	5,64
Manufacture of computer, electronic and optical products	1,449	0,97	110	1,37	7,59
Electrical equipment manufacturing	4,238	2,85	228	2,84	5,38
Manufacture of machinery and equipment not elsewhere classified	14,366	9,65	1,131	14,09	7,87
Manufacture of motor vehicles, trailers and semi-trailers	2,465	1,65	169	2,11	6,86
Manufacture of other means of transportation	767	0,51	55	0,69	7,17
Furniture manufacturing	12,171	8,17	483	6,02	3,97
Other manufacturing	3,027	2,03	208	2,59	6,87
Electricity, gas, steam and air conditioning production and distribution	4,381	2,94	166	2,07	3,79
Production and distribution of electricity, gas, steam and ventilation systems	4,381	2,94	166	2,07	3,79
Total – Industry Sectors	148,943	100	8,026	100	5,39

Table 5 presents the sectoral breakdown of industrial enterprises in İzmir in comparison with Türkiye as a whole as of 2021. With a total of 8,026 industrial enterprises, İzmir accounts for 5.39 percent of total industrial enterprises in Türkiye. Most of the enterprises in the industrial sector operate in the manufacturing industry.

The manufacturing sector accounts for the largest share of industrial enterprises in İzmir. While there are 139,507 manufacturing enterprises in Türkiye, this number is 7,714 in İzmir. This indicates that İzmir has a share of 5.53 percent in the manufacturing industry in Türkiye. Looking at the sub-sectors of the manufacturing industry, the sectors with the highest number of enterprises are food products manufacturing, textile products manufacturing, basic metal industry, factory metal products manufacturing and other non-metallic mineral products manufacturing. Manufacture of food products is the largest sub-sector in İzmir's manufacturing sector with 1,297 enterprises and 6.04 percent of food production enterprises in Türkiye are located in İzmir. Manufacture of textile products has an important place in İzmir with 241 enterprises and constitutes 2.05 percent of textile enterprises in Türkiye.

One of the most notable sectors in İzmir is the production of chemicals and pharmaceuticals. While there are 4,698 chemical production enterprises in Türkiye, there are 372 in İzmir and the sector's share in Türkiye is 7.92 percent. This indicates that İzmir has a strong position in the chemical industry and meets a significant portion of the country's overall production. Similarly, the manufacture of plastics and rubber products occupies an important place in İzmir's industrial structure with 553 enterprises, and this sector has a higher concentration in İzmir than the Turkish average.

The electricity, gas, steam and air conditioning generation and distribution sector is represented by 166 enterprises in İzmir, accounting for 3.79 percent of the total 4,381 enterprises in Türkiye. This ratio shows that İzmir has an important place in energy production and distribution across Türkiye. Electricity generation and distribution is a critical sector for industrial production and logistics activities, and İzmir's position in this area is an important factor supporting industrial infrastructure.

Sectors such as basic metal industry, factory metal products manufacturing and machinery manufacturing also have an important place in İzmir. Especially in the basic metal industry, with 236 enterprises, its share in Türkiye is 5.70 percent. Likewise, the motor vehicle, trailer and semi-trailer manufacturing sector, with 169 enterprises, accounts for 6.86 percent of all enterprises in Türkiye. This indicates that İzmir has a competitive structure in the automotive sub-industry and metalworking sectors.

Overall, İzmir's industrial sector has a wide range of production. Sectors such as the manufacture of food products, chemical and pharmaceutical industry, plastics and rubber products, basic metal industry and machinery manufacturing are among the areas where industrial enterprises are most concentrated in İzmir. However, increasing the share of high-tech sectors in İzmir's industrial structure can increase the value added of industrial production. Increasing support for R&D investments, digital transformation and renewable energy will contribute to the sustainable growth of İzmir's industrial sector.

1.1.3 Service and Tourism Sector

As one of Türkiye's most important service and tourism centers, İzmir is a city where these sectors have a large share in its economic growth. The city's trade, finance, health and logistics sectors are well-developed, with İzmir Port in particular supporting the service sector as the third largest port in Türkiye. İzmir's tourism sector has a wide variety of cultural, nature, sea and health tourism. Historical sites such as Ephesus and Pergamon, which are on the UNESCO World Heritage List, and holiday destinations such as Çeşme, Alaçatı and Foça are important components of tourism activities.

İzmir is also developing in terms of health and thermal tourism, and thermal tourism facilities have an important place especially in regions such as Balçova and Çeşme. Congress and fair tourism also plays a major role in the city's economic structure, with events such as the İzmir International Fair and Marble İzmir International Natural Stone Fair boosting the city's trade and tourism potential. Adnan Menderes Airport, one of the most important transportation investments supporting the development of tourism in the city, is one of the busiest airports in Türkiye in terms of both domestic and international passenger traffic.

Overall, İzmir has a strong infrastructure in the service and tourism sectors and continues to be one of Türkiye's leading destinations with its cultural heritage, natural beauty, transportation networks and health tourism opportunities. With future investments, İzmir's share in the tourism and services sector is expected to increase further.

1.1.4 Trade, Energy and Logistics

İzmir has an important economic role as one of Türkiye's largest trade, energy and logistics centers. With its strategic location, developed infrastructure and extensive trade network, the city has a great advantage in terms of both domestic and international trade. With its port, free zones and organized industrial zones, İzmir is a hub for logistics activities. In terms of the energy sector, İzmir is one of Türkiye's leading provinces with both traditional energy resources and renewable energy investments.

The trade sector is one of the largest components of İzmir's economy and the city is the second largest export center in Türkiye, especially in terms of foreign trade volume. In 2021, İzmir's total exports and imports amounted to $14.7 billion and $10.9 billion, respectively. İzmir's foreign trade balance is positive, with a particularly strong position in exports of industrial and agricultural products (İzmir Chamber of Commerce, 2022). Trade centers such as İZBAŞ and Aliağa Customs Zone are among the important points of international trade.

In terms of the energy sector, İzmir is one of the provinces with the largest energy production capacity in Türkiye. The city has an extensive energy production network, both in terms of thermal power plants and renewable energy sources. Solar energy investments are also on the rise in İzmir, and the city's energy sector is strengthened by renewable power plants and energy storage projects. The Aliağa region plays a critical role in Türkiye's energy supply security with its petrochemical and refinery facilities.

In terms of the logistics sector, İzmir is one of the largest port cities in Türkiye, with İzmir Port, Aliağa Port and Nemrut Bay ports having the largest cargo transportation capacity in the country (İzmir Ports Current Situation Analysis İZKA, 2022). İzmir's well-developed highway and railway network enables logistics activities in the city to be carried out effectively. In particular, the İzmir-Ankara High-Speed Train Project and port-connected railway projects are among the important investments that increase İzmir's logistics potential.

1.2 The Impact of Technological and Sectoral Developments on the Labor Market

As one of Türkiye's largest industrial and commercial centers, İzmir is one of the cities that feel the effects of technological and sectoral developments on the labor market the most. New technologies such as digital transformation, automation, artificial intelligence and renewable energy are transforming the labor force structure and changing employment dynamics in different sectors. Increasing digitalization, especially in the industrial and service sectors, increases the demand for qualified labor, while some traditional professions are declining due to automation.

In the industrial sector, Industry 4.0 and automation applications are driving greater efficiency in production processes and changing the quality of the workforce. As organized industrial zones in İzmir adapt to digital production techniques, the demand for workforce specialized in fields such as engineering, software and data analysis is increasing (İZKA, 2023). While this transformation makes it difficult to employ low-skilled workers in the industrial sector, it increases the number of high-tech jobs. Technology-oriented production processes, especially in the machinery, automotive and electronics sectors, are transforming the quality of the workforce.

In the service sector, technological developments are bringing new working models such as e-commerce, digital marketing and telecommuting to the fore. In İzmir, the retail and finance sectors are adapting rapidly to digitalization, creating new employment opportunities in areas such as data analytics, cyber security and digital customer service (TURKSTAT, 2023). However, this change is leading to a decline in physical store employment in the traditional retail sector and requires the workforce to acquire digital competencies.

Another impact of technological developments on the labor market is the growth in the renewable energy sector. İzmir has an important position in wind and solar energy production in Türkiye. This has created new areas of employment in the energy sector and led to the development of new professions such as engineering, energy management and green technology specializations (İzmir Development Agency, 2023). Energy investments, especially in Aliağa, and İzmir's incentives for renewable energy increase the demand for specialized workforce in the clean energy sector.

1.3 Employers' Perceptions and Preferences towards Migrant Workers

Employers' employment policies and practices towards migrant workers in İzmir are shaped by legal regulations, economic factors and sectoral needs. Industry, agriculture, services and construction are among the sectors where migrant workers are predominantly employed, and employers generally consider these workers as low-cost and flexible labor force (TURKSTAT, 2023). However, there are significant differences between formal and informal working conditions in terms of employment policies and practices.

The employment of migrant workers in the industrial sector is generally concentrated in low-skilled jobs. It is observed that migrant workers are intensively employed in the textile, food, plastics and metal industries. Firms operating in these sectors mostly employ migrant workers in order to reduce production costs. However, some large industrial enterprises legally employ migrant workers under work permits as they have to comply with international labor management standards (İZKA, 2023).

In the service sector, migrant workers are mostly employed in tourism, hotel management and restaurant management. In İzmir, especially in touristic areas such as Çeşme, Alaçatı and Foça, hotels and restaurants turn to migrant workers to meet their seasonal labor needs. However, the rate of unregistered work in this sector is quite high and workers have limited access to social rights.

Employers in İzmir face various legal, bureaucratic and sectoral obstacles in the recruitment of migrant workers. The primary problem is the complexity and lengthy legal processes required for migrant workers to obtain work permits. This leads employers to turn to informal employment. The second major obstacle is the language barrier and the lack of professional qualification certificates. Employers are concerned about the productivity of migrant workers, especially in the industrial and service sectors, due to their lack of communication skills and technical training (ISKUR, 2023). Moreover, social security and insurance obligations create additional costs for employers and make it difficult to employ migrant workers. Small and medium-sized enterprises in particular struggle to meet these obligations (TURKSTAT, 2023).

The vocational training and development opportunities provided by employers to migrant workers in İzmir vary by sector and scale of business. Large-scale industrial and service enterprises offer short-term vocational training and on-the-job programs to migrant workers to help them adapt to production processes more quickly (IZKA, 2023). However, such training programs are usually targeted at low-skilled jobs and aim at adaptation to basic business processes rather than technical skills. In the service sector, particularly in tourism and hospitality, some language and customer relations training is provided for migrant workers. Hotels and restaurants organize short-term courses to improve the basic communication skills of migrant workers, especially those working in establishments that host foreign customers (TURKSTAT, 2023).

1.4 Sectoral Employment Trends: Demand for Skilled, Unskilled, Youth, Female, and Seasonal Labor

İThe sectors that provide the most employment in İzmir are industry, trade, services and agriculture. While the industrial sector creates intense employment, especially in the automotive sub-industry, textile, food and chemical industries, the trade sector has a large labor potential in retail and wholesale (TURKSTAT, 2023). The service sector offers a wide employment network in areas such as tourism, logistics, health and education, while the number of people working in the tourism sector increases significantly, especially in the summer season (İZKA, 2023). The agricultural sector, on the other hand, provides an important source of labor, especially in olive, grape and vegetable production thanks to İzmir's fertile soils, and continues to be an area where seasonal workers are heavily employed (ISKUR, 2023). Overall, the majority of employment in İzmir is concentrated in the industrial and service sectors, and the dynamic structure of the city's economy is constantly shaping the labor market.

With the development of the industrial, service and technology sectors in İzmir, **the demand for qualified labor** is increasing. In particular, the need for specialized workforce in areas such as engineering, software, data analytics, automation, renewable energy and health is coming to the fore (TURKSTAT, 2023). With the spread of Industry 4.0 and digital production processes in the industrial sector, demand for mechanical engineers, electrical-electronics specialists and technical operators is increasing, while in the service sector, finance, e-commerce and digital marketing specialties are coming to the fore (İZKA, 2022). Furthermore, İzmir is one of Türkiye's leading cities in renewable energy production, increasing the need for qualified personnel in wind and solar engineering. Employers prefer employees with digital skills and a focus on innovation, while vocational training and university-industry collaborations aim to improve the quality of the workforce.

Demand for unskilled labor in İzmir is particularly concentrated in the industrial, agricultural, construction and service sectors. In the industrial sector, the demand for unskilled workers continues in labor-intensive areas such as textiles, food and plastics production, while the construction sector continues to need low-skilled labor (TURKSTAT, 2023). In the agricultural sector, seasonal workers are an important source of employment in areas such as olive, grape and vegetable production (ISKUR, 2023). In the service sector, the need for low-skilled workers in cleaning, logistics and tourism is increasing due to seasonal fluctuations. However, with the spread of automation and digitalization, the demand for unskilled labor is gradually decreasing, narrowing the employment opportunities of these workers.

The demand for young labor in İzmir is concentrated in the technology, service and industrial sectors, with a growing need for young workers, especially in software, e-commerce, digital marketing, renewable energy and engineering (TURKSTAT, 2023). In the industrial sector, with digital transformation and automation processes, employment opportunities for young technical staff and engineering graduates are expanding, while in the service sector, demand for young labor is increasing in call centers, finance and tourism (İZKA, 2022). However, due to lack of experience in the transition to employment after graduation, young people may take longer to find a job, leading to high unemployment rates (ISKUR, 2023). While employers expect digital skills, foreign language skills and adaptability from young employees, vocational training and internship programs need to be increased to integrate young people into the workforce more easily.

Female labor demand in İzmir is particularly concentrated in the service, health, education, tourism and industrial sectors. While women's employment is increasing in areas such as retail trade, call centers, finance and insurance services, the proportion of female employees in the health and education sectors is traditionally high (TURKSTAT, 2023). In the industrial sector, demand for female labor continues in labor-intensive industries such as textiles, food and electronic assembly (IZKA, 2023). However, the underrepresentation of women in management positions and technical fields stands out as a factor limiting employment opportunities.

Seasonal labor demand in İzmir is particularly concentrated in the agriculture, tourism and retail sectors. In the agricultural sector, seasonal workers are employed during harvest periods in labor-intensive areas such as olive, grape and vegetable production, and the majority of this workforce consists of migrant workers and local workers living in rural areas (ISKUR, 2023). In the tourism sector, there is a significant increase in the number of temporary workers employed in hotels, restaurants and entertainment venues during the summer season, and young labor is employed seasonally, especially in touristic regions such as Çeşme, Alaçatı and Foça (IZKA, 2023). In the retail sector, demand for short-term labor increases during peak shopping times such as Christmas, holidays and discount periods. However, seasonal labor employment is often unregistered and the lack of social security creates a significant disadvantage for workers (TURKSTAT, 2023).

1.5 Women Participation to Labor Force and Career Development: A Cross-Gender Comparison

Although women's labor force participation rate in İzmir is above Türkiye's average, they face various obstacles in business life. Women's work experience is more concentrated in the service, health, education and retail sectors, while their employment rates are lower in industry and technology (TURKSTAT, 2023). Women's work experience and barriers to employment in İzmir are shaped by sectoral distribution and structural inequalities in the labor market. Women are mostly employed in the education, health, service and retail sectors, but their representation in industry, technology and engineering remains low (ISKUR, 2023).

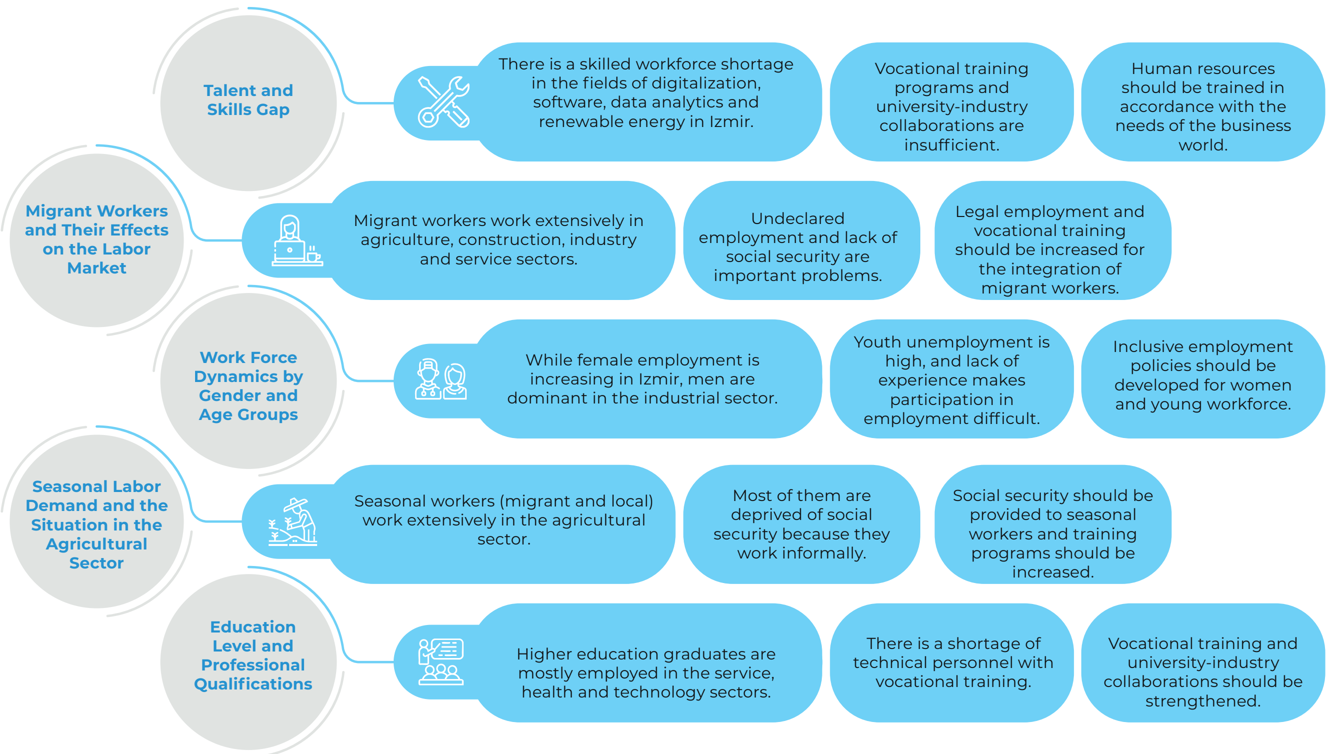
Women's career development in İzmir is shaped by their level of education, sector dynamics and gender equality policies in the workplace. Women's career development in İzmir is concentrated in the service, education and health sectors, but is more limited in industry and technology. According to ISKUR's labor force reports, women are less likely to be promoted to managerial positions than men. IZKA reports highlight that women's entrepreneurship is on the rise in İzmir, but significant barriers remain in terms of access to finance, equal opportunities in business and professional development. The lack of flexible working models and limited childcare services have a negative impact on women's labor force participation and career advancement.

Gender differences in the labor market in İzmir are evident in terms of sectoral distribution, wage inequality, career advancement opportunities and employment rates. The labor force participation rate of women is lower than that of men, and men dominate especially in the industrial and technology sectors (TURKSTAT, 2023). Women are more concentrated in the service, education, health and retail sectors, while men are predominantly employed in construction, industry and engineering (ISKUR, 2023). Wage inequality results in women earning lower salaries than men in the same position and women face more obstacles in promotion processes. In addition, women have a greater need for flexible working hours due to family responsibilities, but these opportunities are not sufficiently offered in the labor market. Incentives for women's employment, the implementation of gender equality policies in workplaces and the development of vocational training programs are needed to increase equal opportunities between the sexes.

1.6 Prominent Findings in Literature Review

The main findings of the literature review on İzmir's labor market are summarized in Figure-2.

Figure 2. Findings from the Literature Review on İzmir



In this section, studies in the literature are reviewed in order to draw a general framework of the labor market in İzmir. In order to support the findings in the literature with data from the field, the next section analyzes the secondary data collected in İzmir.

CHAPTER II

CHAPTER II

2. ANALYSIS OF SECONDARY DATA AND FINDINGS

This chapter provides a detailed analysis of İzmir's demographic structure, labor market, employment dynamics, employment dynamics, social security situation and migration movements based on data from TURKSTAT, ISKUR, SSI, the Ministry of Labor and Social Security and Presidency of Migration Management.

2.1 Population and Demographic Statistics

2.1.1 TURKSTAT Population Registration System Statistics

Populations of settlements are calculated by taking into account the population from the Address Based Population Registration System updated by the Ministry of Interior General Directorate of Population and Citizenship Affairs and the population residing in institutional places. Individuals staying in institutional places such as barracks, prisons, retirement homes, university student dormitories are included in the population of the settlement where the institutional places are located, not in the population of the settlement where their residence address is located, as per the international definition. In addition, populations by provinces, districts, municipalities, villages and neighborhoods are based on the National Address Database records dated 31 December 2023. Within the scope of the foreign national population; individuals with a valid residence or work permit on the reference date, individuals with an international protection identity document and an address declaration, and blue card holders were evaluated. Foreigners with a visa or residence permit for less than 90 days for reasons such as courses, tourism, scientific research, etc. and SuTP/IPSHA status are not included in the population.

Tablo 6. TURKSTAT, Address Based Population Registration System Results, 2023

Population	Years	Türkiye	İzmir
Total Population	2022	85,279,553	4,462,056
	2023	85,372,377	4,479,525
Provincial and District Centers	2022	79,613,279	4,462,056
	2023	79,399,292	4,479,525
Annual Population Growth Rate	2021-2022	7,1	8,2
	2022-2023	1,1	3,9

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İzmir's total population increased from 4,462,056 in 2022 to 4,479,525 in 2023. Türkiye experienced a similar increase, but İzmir's annual population growth rate declined from 8.2% in 2021-2022 to 3.9% in 2022-2023. This indicates a significant slowdown in the rate of population growth (Table 6).

In terms of population living in provincial and district centers, İzmir has a high urbanization rate. As of 2023, the entire population of İzmir was recorded as living in provincial and district centers. The decline in the population growth rate can be attributed to migration movements, changes in fertility rates and economic conditions. It can be said that İzmir continues to show population growth in line with the demographic trends in Türkiye, but at a slower rate compared to previous years.

Table 7. Provincial/District Center, Town/Village Population and Population Density by Gender, 2023

Population	Gender	Türkiye	İzmir
Total Population	**Total**	85,372,377	4,479,525
	Male	42,734,071	2,221,180
	Female	42,638,306	2,258,345
Provincial and District Centers	**Total**	79,399,292	4,479,525
	Male	39,664,342	2,221,180
	Female	39,734,950	2,258,345
Population Density		111	373

The total population of İzmir is 4,479,525, of which 2,221,180 are male and 2,258,345 are female. A similar distribution is observed across Türkiye, with 50.1% of the total population being male and 49.9% female (Table 7). In terms of population density, the number of people per square kilometer in İzmir is 373. In Türkiye, this value is 111. İzmir's high population density indicates that urban settlement remains strong and the city has a dense population structure.

Table 8. Median Age by Gender, 2023

Years	Gender	Türkiye	İzmir
2022	**Total**	33,5	38,0
	Male	32,8	36,9
	Female	34,2	39,0
2023	**Total**	34,0	38,4
	Male	33,2	37,4
	Female	34,7	39,5

According to data on the median age distribution by gender in İzmir and Türkiye in 2022 and 2023 (Table 8), the median age in İzmir is above the average for Türkiye, indicating that the demographic structure of the province has a relatively older population. By 2023, while the median age in Türkiye is calculated as 34, this value is 38.4 in İzmir.

On a gender basis, the median age of women in İzmir is 39.5, while that of men is 37.4. A similar trend is observed across Türkiye, where the median age of women is higher than that of men. This can be attributed to factors such as women's longer life expectancy and declining fertility rates over time. In İzmir, the median age has increased compared to 2022, indicating that the province has an aging population.

Table 9. Population by Marital Status and Gender, 2023

Marital Status	Gender	Türkiye	İzmir
Total	**Total**	67,060,744	3,701,733
	Male	33,339,609	1,821,958
	Female	33,721,135	1,879,775
Never Married	**Total**	19,231,798	970,187
	Male	10,911,913	563,936
	Female	8,319,885	406,251
Married	**Total**	40,876,455	2,207,233
	Male	20,460,478	1,101,200
	Female	20,415,977	1,106,033
Divorced	**Total**	3,205,212	290,876
	Male	1,415,476	125,693
	Female	1,789,736	165,183
Widower	**Total**	3,747,279	233,437
	Male	551,742	31,129
	Female	3,195,537	202,308

As of 2023, data on the distribution of marital status by gender across İzmir and Türkiye (Table 9) reveals the demographic distribution of never-married, married, divorced and separated individuals in İzmir. İzmir's marital status structure is broadly similar to Türkiye's overall trends.

There are 3,701,733 people in İzmir, of which 970,187 have never been married, 2,207,233 are married, 290,876 are divorced and 233,437 have lost their spouses. When analyzed by gender, it is observed that the number of never-married men (563,936) is higher than the number of women (406,251). Among married individuals, the number of men and women is close to each other, with 1,101,200 men and 1,106,033 women registered as married. Among divorced individuals, the higher number of women (165,183) compared to men (125,693) suggests that the remarriage rate of women after divorce may be lower. In terms of bereaved individuals, women (202,308) are significantly more than men (31,129).

Table 10. Foreign Population

Years	Gender	Türkiye	İzmir
2022	**Total**	1,823,836	40,375
	Male	902,124	17,753
	Female	921,712	22,622
2023	**Total**	1,570,543	37,776
	Male	762,672	16,057
	Female	807,871	21,719

In 2022 and 2023, the data showing the distribution of foreign population by gender in İzmir and Türkiye (Table 10) reveals that the foreign population in İzmir and Türkiye decreased in both years, and that this trend may be directly related to migration policies, economic conditions and international mobility. While 40,375 foreigners resided in İzmir in 2022, this number decreased to 37,776 in 2023. A similar decline was observed across Türkiye, with the total foreign population falling from 1,823,836 to 1,570,543. Analyzed by gender, the male foreign population in İzmir was recorded as 16,057 and the female foreign population as 21,719 in 2023. In Türkiye as a whole, the female foreign population is higher than the male population.

Table 11. Average Household Size, 2008-2023

Years	Türkiye	İzmir
2008	4,0	3,4
2009	4,0	3,4
2010	3,8	3,3
2011	3,8	3,2
2012	3,7	3,2
2013	3,6	3,1
2014	3,6	3,1
2015	3,5	3,1
2016	3,5	3,0
2017	3,4	3,0
2018	3,4	3,0
2019	3,4	2,9
2020	3,3	2,9
2021	3,2	2,9
2022	3,2	2,8
2023	3,1	2,8

In 2008, the average household size in Türkiye was recorded as 4 people, while in İzmir it was 3.4 people,. Over the years, this ratio has shown a downward trend in both regions and as of 2023, it has declined to 3.1 in Türkiye and 2.8 in İzmir (Table 11). The lower household size in İzmir compared to the Türkiye average can be explained by the high level of urbanization, the widespread use of nuclear family structure and the increase in the proportion of individuals living alone. This trend in İzmir can be considered as a reflection of the demographic transformation observed in metropolitan cities.

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Table 12. Age Dependency Ratio, 2007-2023

Age	Türkiye	İzmir
Total	85,372,377	4,479,525
0-14	18,311,633	777,792
15-64	58,337,938	3,127,877
65 +	8,722,806	573,856
Total Age Dependency Ratio (%)	46,3	43,2
Child Dependency Ratio (%)	31,4	24,9
Elderly Dependency Ratio (%)	15,0	18,3

The total age dependency ratio in İzmir is 43.2%, which is lower than the national average of 46.3%. The child dependency ratio in İzmir is 24.9%, lower than the Türkiye average of 31.4%, which can be attributed to the decline in fertility rates in the province. The elderly dependency ratio, at 18.3%, is above the national average of 15% (Table 12). These data show that İzmir has an ageing population structure and that the impact of the elderly population on the working age population is increasing. İzmir's demographic transformation increases the importance of policies for health services, social security and elderly care.

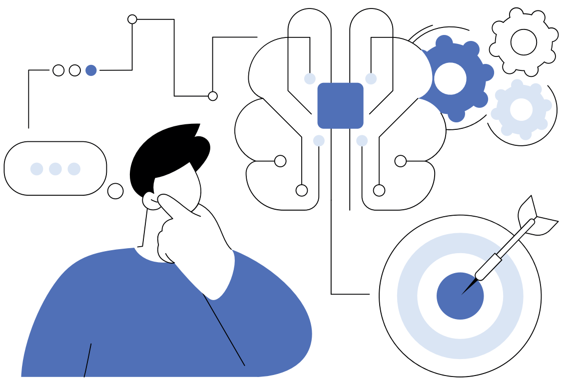
Table 13. Annual Population Growth Rate and Population Density by Years, 2007-2023

Population	Years	Türkiye	İzmir
Annual Population Growth Rate (%)	2007-2008	13,1	15,0
	2008-2009	14,5	18,9
	2009-2010	15,9	20,6
	2010-2011	13,5	4,1
	2011-2012	12,0	10,1
	2012-2013	13,7	13,8
	2013-2014	13,3	12,7
	2014-2015	13,4	13,4
	2015-2016	13,5	13,1
	2016-2017	12,4	13,2
	2017-2018	14,7	9,5
	2018-2019	13,9	10,8
	2019-2020	5,5	6,3
	2020-2021	12,7	7,1
	2021-2022	7,1	8,2
	2022-2023	1,1	3,9

Table 13. Annual Population Growth Rate and Population Density by Years, 2007-2023

Population	Years	Türkiye	İzmir
Population Density(R)	2007	92	312
	2008	93	317
	2009	94	323
	2010	96	330
	2011	97	331
	2012	98	335
	2013	100	339
	2014	101	344
	2015	102	348
	2016	104	353
	2017	105	358
	2018	107	361
	2019	108	365
	2020	109	367
	2021	110	370
	2022	111	373
	2023	111	374

In the period 2022-2023, İzmir's annual population growth rate is calculated as 3.9%, which is higher than the 1.1% rate in Türkiye. However, compared to previous years, İzmir's population growth rate is on a downward trend. In terms of population density, İzmir has a much denser population structure compared to Türkiye's average. As of 2023, while Türkiye's population density is 111 people/km², this value is calculated as 374 people/km² in İzmir (Table 13). This indicates that İzmir is one of the most densely populated cities in the country and that the urbanization process continues strongly.



2.2 Labor Force and Employment Statistics

2.2.1 TURKSTAT Labor Market Indicators: Unemployment, Employment, and Participation Rates

Table 14. Unemployment Rate

Year	Confidence Interval	Thereshold Values	Türkiye	İzmir
2022	Ratio		10,4	13,0
	95% Confidence Interval	Lower Limit	10,2	12,1
		Upper Limit	10,6	14,0
2023	Ratio		9,4	11,4
	95% Confidence Interval	Lower Limit	9,2	10,5
		Upper Limit	9,6	12,3

In 2022, the unemployment rate in İzmir was recorded at 13%, higher than the Turkish average of 10.4%. By 2023, the unemployment rate had fallen to 11.4% in İzmir and 9.4% in Türkiye as a whole. The high unemployment rate in İzmir compared to Türkiye's average can be explained by the high labor supply in the city and the limited capacity to create employment in certain sectors 95% confidence intervals show that the unemployment rate in İzmir ranged between 12.1% and 14% in 2022 and between 10.5% and 12.3% in 2023. While the decline in the unemployment rate is a positive development, it is understood that the labor market in İzmir has more challenging conditions compared to the Turkish average (Table 14).

Table 15. Employment Rate

Year	Confidence Interval	Thereshold Values	Türkiye	İzmir
2022	Ratio		47,5	47,3
	95% Confidence Interval	Lower Limit	47,3	46,1
		Upper Limit	47,8	48,5
2023	Ratio		48,3	47,9
	95% Confidence Interval	Lower Limit	48,0	46,7
		Upper Limit	48,6	49,1

In 2022, the employment rate in Türkiye was 47.5%, while in İzmir it was 47.3%. By 2023, the employment rate in Türkiye will rise to 48.3%, while in İzmir it will be 47.9%. It is observed that the employment rate in İzmir follows a course close to the average of Türkiye. When 95% confidence intervals are evaluated, it is understood that the employment rate in İzmir ranges between 46.1% and 48.5% in 2022 and between 46.7% and 49.1% in 2023 (Table 15).

Table 16. Labor Force Participation Rate

Year	Confidence Interval	Thereshold Values	Türkiye	İzmir
2022	**Ratio**		53,1	54,4
	95% Confidence Interval	**Lower Limit**	52,8	53,2
		Upper Limit	53,3	55,5
2023	**Ratio**		53,3	54,1
	95% Confidence Interval	**Lower Limit**	53,1	52,9
		Upper Limit	53,5	55,2

In 2022, the labor force participation rate in Türkiye was 53.1%, while in İzmir it was 54.4%. By 2023, while the labor force participation rate in Türkiye increased to 53.3%, it decreased to 54.1% in İzmir 95% confidence intervals indicate that the labor force participation rate in İzmir was between 53.2% and 55.5% in 2022 and between 52.9% and 55.2% in 2023 (Table 16).

2.2.2 ISKUR Labor Market Statistics (Open Vacancy Announcement, Unemployment Statistics, Labor Force Surveys)

Table 17. Open Vacancy Announcement and Job Placements

Job Status	Open Vacancy Announcement	Gender	İzmir	Türkiye
Open Vacancy Announcement	**Public**		515	30,190
	Special		143,648	2,646,816
	Total		144,163	2,677,006
Job Placement	**Public**	**Male**	191	11,581
		Female	46	4,935
		Total	237	16,516
	Special	**Male**	35,032	761,307
		Female	28,352	459,203
		Total	63,384	1,220,510
	Total	**Male**	35,223	772,888
		Female	28,398	464,138
		Total	63,621	1,237,026

The total number of vacancies in İzmir is recorded as 144,163, the majority of which are in the private sector. While there are 143,648 vacancies in the private sector, this number is limited to 515 in the public sector. This reveals that employment in İzmir is largely provided by the private sector. An analysis of job placement data reveals that a total of 63,621 people were placed in employment in İzmir, the majority of which was through the private sector. While 63,384 people were placed in jobs in the private sector, only 237 people were placed by ISKUR in the public sector. While the number of men placed in private sector jobs was 35,032, the number of women was 28,352 (Table 17).

Table 18. Placements by Age Groups

Year	Gender	İzmir	Türkiye
15- 24	**Male**	11,732	268,499
	Female	9,950	189,225
	Total	21,682	457,724
25 -29	**Male**	6,862	149,511
	Female	5,038	81,088
	Total	11,900	230,599
30- 34	**Male**	4,048	93,457
	Female	3,158	49,210
	Total	7,206	142,667
35-39	**Male**	3,320	74,114
	Female	2,856	47,472
	Total	6,176	121,586
40- 44	**Male**	3,228	69,395
	Female	3,083	45,752
	Total	6,311	115,147
45-49	**Male**	3,162	59,465
	Female	2,353	30,307
	Total	5,515	89,772
50-54	**Male**	1,851	36,786
	Female	1,197	14,149
	Total	3,048	50,935
55-59	**Male**	767	14,998
	Female	563	5,047
	Total	1,330	20,045

Tablo 18. Placements by Age Groups and Provinces

Year	Gender	İzmir	Türkiye
60-64	**Male**	194	5,174
	Female	165	1,435
	Total	359	6,609
65+	**Male**	59	1,489
	Female	35	453
	Total	94	1,942
Total	**Male**	35,223	772,888
	Female	28,398	464,138
	Total	63,621	1,237,026

According to ISKUR data, a total of 63,621 people were placed in jobs in İzmir, of which 35,223 were male and 28,398 were female. When analyzed by age groups, the highest number of job placements was realized in the 15-24 age group and a total of 21,682 people were placed by ISKUR in this age group (Table 18). There is a gradual decrease in job placement rates with increasing age. In the 25-29 age group, 11,900 people and in the 30-34 age group, 7,206 people were placed by ISKUR. In the age group of 50 and above, the placement rates are quite low. This difference is more pronounced for women aged 45 and above.

Table 19. Distribution of Job Placements by Educational Background

Education Status	Gender	İzmir	Türkiye
Illiterate	**Male**	13	667
	Female	9	174
	Total	22	841
Literate (no formal education completed)	**Male**	174	12,387
	Female	168	6,002
	Total	342	18,389
Primary Education	**Male**	14,654	307,813
	Female	10,115	147,342
	Total	24,769	455,155
Secondary Education	**Male**	14,223	326,857
	Female	10,107	183,932
	Total	24,330	510,789
Associate Degree	**Male**	2,884	62,086
	Female	3,947	65,746
	Total	6,831	127,832

Table 19. Distribution of Job Placements by Educational Background

Education Status	Gender	İzmir	Türkiye
Bachelor's Degree	**Male**	3,174	60,938
	Female	3,898	58,836
	Total	7,072	119,774
Master's Degree	**Male**	100	2,046
	Female	148	2,016
	Total	248	4,062
PhD	**Male**	1	94
	Female	6	90
	Total	7	184
Total	**Male**	35,223	772,888
	Female	28,398	464,138
	Total	63,621	1,237,026

According to ISKUR data, job placements in İzmir are mostly concentrated in primary and secondary education graduates. Primary education graduates constitute the largest group placed by ISKUR with 24,769 people, while secondary education graduates are in second place with 24,330 people. The employment of associate's and bachelor's degree graduates remained relatively low, while master's and doctorate graduates were placed in a very limited number of jobs. In İzmir, only 248 master's degree graduates and only 7 PhD graduates were placed by ISKUR. This data shows that the rate of job placement through ISKUR decreases as the level of education increases, and that higher education graduates prefer direct sector-based job search channels (Table 19).

Table 20. Distribution of Unemployed Registered with ISKUR by Occupational Groups

Occupational Groups	İzmir	Türkiye
Office Services Employees	15,361	249,265
Service and Sales Workers	20,616	431,768
Occupations that do not Require Qualifications	37,709	957,763
Skilled Agricultural, Forestry and Aquaculture Workers	596	22,411
Professional Professionals	9,994	167,044
Craftsmen and Related Occupations	9,726	205,836
Armed Forces Related Occupations	38	709
Technicians, Technicians and Assistant Professionals	9,870	165,596
Plant and Machine Operators and Assemblers	8,272	196,233
Managers	1,542	23,826
Total	113,724	2,420,451

As of 2023, according to the data on the distribution of unemployed registered with ISKUR in İzmir and Türkiye by occupational groups (Table 20), the highest number of unemployed in İzmir is in the **"Unskilled Occupations"** category, with a total of 37,709 people looking for a job in this group. This indicates that low-skilled labor force has more difficulty in being employed and the demand for unskilled labor force remains limited. Service and sales workers (20,616 people) and clerical workers (15,361 people) constitute the second and third largest groups among the unemployed. In relation to the industrial sector, **"Plant and Machine Operators and Assemblers"** (8,272 people) and "Craftsmen and Related Workers" (9,726 people) are also among the areas with high unemployment. Unemployment is also observed in the groups of **"Professional"** (9,994 people) and **"Technicians"** (9,870 people).

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Table 21. Unemployed Registered with ISKUR by Age Groups

Age	Gender	İzmir	Türkiye
15 - 24	**Male**	8,764	257,307
	Female	8,949	228,122
	Total	17,713	485,429
25 -29	**Male**	9,624	245,394
	Female	11,392	251,120
	Total	21,016	496,514
30 - 34	**Male**	8,600	192,957
	Female	10,576	207,888
	Total	19,176	400,845
35-39	**Male**	7,649	163,319
	Female	9,950	186,245
	Total	17,599	349,564
40 - 44	**Male**	7,104	136,011
	Female	8,847	151,300
	Total	15,951	287,311
45-49	**Male**	4,968	92,109
	Female	6,282	101,076
	Total	11,250	193,185
50-54	**Male**	3,242	63,796
	Female	3,507	60,281
	Total	6,749	124,077
55-59	**Male**	1,446	29,772
	Female	1,502	25,258
	Total	2,948	55,030
60-64	**Male**	607	13,047
	Female	383	8,059
	Total	990	21,106
65+	**Male**	206	4,460
	Female	126	2,930
	Total	332	7,390

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Table 21. Unemployed Registered with ISKUR by Age Groups

Age	Gender	İzmir	Türkiye
Total	**Male**	52,210	1,198,172
	Female	61,514	1,222,279
	Total	113,724	2,420,451

The highest unemployment rate in İzmir is in the 25-29 age group, with a total of 21,016 people in this age group registered as unemployed. This is followed by 19,176 people in the 30-34 age group and 17,713 people in the 15-24 age group (Table 21). There is a decline in unemployment rates with increasing age. While the number of unemployed in the 40 and over age group has gradually decreased, unemployment in the 60 and over age group has fallen to very low levels. Analyzed by gender, the number of unemployed women in İzmir is 61,514, higher than the number of unemployed men (52,210). The fact that the unemployment rate of women in the 25-39 age group is higher than that of men indicates the existence of barriers to women's participation in the labor force.

Table 22. Distribution of Unemployed Registered with ISKUR by Educational Background

	Gender	İzmir	Türkiye
Illiterate	**Male**	303	7,971
	Female	401	15,619
	Total	704	23,590
Literate (no formal education completed)	**Male**	687	23,732
	Female	875	33,297
	Total	1,562	57,029
Primary Education	**Male**	20,805	465,555
	Female	18,594	388,427
	Total	3,399	853,982
Secondary Education	**Male**	18,948	470,158
	Female	20,429	406,134
	Total	39,377	876,292
Associate Degree	**Male**	4,378	104,149
	Female	9,420	191,638
	Total	13,798	295,787
Bachelor's Degree	**Male**	6,656	120,459
	Female	11,184	178,882
	Total	17,840	299,341

Table 22. Distribution of Unemployed Registered with ISKUR by Educational Background

	Gender	İzmir	Türkiye
Master's Degree	**Male**	418	5,825
	Female	584	7,957
	Total	1,002	13,782
PhD	**Male**	15	323
	Female	27	325
	Total	42	648
Total	**Male**	52,210	1,198,172
	Female	61,514	1,222,279
	Total	113,724	2,420,451

According to ISKUR data, most of the unemployed in İzmir are primary and secondary education graduates. While primary education graduates are the largest group of unemployed with 39,399 people, secondary education graduates are in second place with 39,377 people. This situation reveals that individuals with low and middle education levels have more difficulties in the labor market. Associate's and bachelor's degree graduates have a significant share among the unemployed with 31,638 people in total, and it is noteworthy that the unemployment rate of higher education graduates registered with ISKUR is higher than that of men, especially among women (Table 22).

Table 23. Job Placements for People with Disabilities, Former Convicts and People Injured in the War on Terror

Disadvantaged Groups	Job Placements	Gender	İzmir	Türkiye
People with Disabilities	**Public**	**Male**	15	451
		Female	3	104
		Total	18	555
	Private Sector	**Male**	1,074	27,501
		Female	354	7,121
		Total	1,428	34,622
	Total	**Male**	1,089	27,952
		Female	357	7,225
		Total	1,446	35,177
Ex-convict / Injured in the War on Terror	**Public**	**Male**	2	165
		Female	0	3
		Total	2	168

A total of 1,446 disabled people were placed in jobs in İzmir, and the majority of these placements were in the private sector. In the public sector, only 18 disabled people were placed by ISKUR. This indicates that the private sector plays a greater role in the employment of the disabled and that more incentives and quotas are needed for the employment of the disabled in the public sector. Employment of ex-convicts and individuals injured in the fight against terrorism is quite limited. While a total of 168 people were employed in Türkiye, only 2 people in İzmir were employed by ISKUR in the public sector.

Table 24. Statistics on People with Disabilities

People with Disabled	Job Placement	İzmir	Türkiye
Number of Workplaces Obliged to Employ Disabled People	**Public**	43	1,433
	Private Sector	1,078	21,501
	Total	1,121	22,934
Number of Disabled People Currently Working	**Public**	964	22,449
	Private Sector	6,751	121,729
	Total	7,715	144,178
Number of Open Disability Quotas	**Public**	79	3,532
	Private Sector	1,210	21,370
	Total	1,289	24,902
Number of People with Disabilities Employed Above the Quota	**Public**	122	3,453
	Private Sector	624	10,407
	Total	746	13,860

There are a total of 1,121 workplaces in İzmir that are obliged to employ disabled people, most of which belong to the private sector. The number of disabled people currently employed is 7,715, of which only 964 are employed in the public sector. There are a total of 1,289 vacancies in İzmir and it is seen that more incentives and support mechanisms are needed to increase the participation of people with disabilities in the labor force. A similar situation is observed across Türkiye, with a total of 24,902 vacancies remaining unfilled. On the other hand, it is observed that some workplaces support the employment of people with disabilities beyond the legal requirements and 746 people with disabilities are employed as over-quota in İzmir (Table 24).

Table 25. Services Provided by ISKUR for Women

Employment Movements	Services	İzmir	Türkiye
Job Placement	**Public**	46	4,935
	Private Sector	28,352	459,203
	Total	28,398	464,138
Akif Labor Market Policies	**Vocational Training**	13	607
	On-the-Job Training	1,173	26,761
	Total	1,186	27,368
Individual Interview	**Number of Interviews**	67,225	1,132,034

As of 2023, a total of 28,398 women were placed in jobs through ISKUR in İzmir, all of whom were employed in the private sector. In Türkiye as a whole, 464,138 women were placed in jobs and the number of women employed in the public sector remained very limited. Within the scope of active labor market policies for women, 1,186 women in İzmir benefited from vocational training and on-the-job training programs. In Türkiye, a total of 27,368 women benefited from these programs. In addition, the number of women benefiting from individual counseling services was recorded as 67,225 in İzmir (Table 25).

Table 26. ISKUR's Services for Social Assistance Recipients

Employment Movements	Gender / Training	İzmir	Türkiye
Job Placement	**Male**	270	10,923
	Female	266	5,902
	Total	536	16,825
Active Labor Market Programs	**Vocational Training**	2	181
	On-the-Job Training	35	2,156
	Total	37	2,337

In İzmir, a total of 536 people were placed in employment through ISKUR, of which 270 were men and 266 were women. In Türkiye, 16,825 people receiving social assistance were placed in employment. In İzmir, the labor force participation rate of social assistance recipients is low and women's participation in employment is more limited than men's. Participation in active labor market programs implemented to support the integration of social assistance recipients into the labor force is very low. In İzmir, only 37 people benefited from these programs, 2 of whom participated in vocational training programs and 35 in on-the-job training programs (Table 26).

Table 27. Unemployment Insurance Activities

Activities	Appropriation Status	İzmir	Türkiye
Application for Unemployment Benefits		94,267	1,614,184
Number of Unemployment Allowance Claimants	**Unemployment Allowance Withheld**	15,981	247,973
	Unemployment Allowance Ended	12,452	184,034
	Ongoing Payment	18,712	302,839

As of 2023, a total of 94,267 people applied for unemployment benefits in İzmir, compared to 1,614,184 in Türkiye. However, the number of people eligible for unemployment benefit was 15,981 in İzmir and 247,973 in Türkiye. When the unemployment benefit process is analyzed, 18,712 people in İzmir continued to receive unemployment benefits, while 12,452 people's benefits were terminated. In Türkiye, these figures are 302,839 and 184,034, respectively (Table 27).

Table 28. Unemployment Allowance Claimants by Age Groups

Age Ranges	Gender	İzmir	Türkiye
15-24	**Male**	1,707	32,249
	Female	1,273	22,647
	Total	2,980	54,896
25-29	**Male**	4,750	79,901
	Female	4,210	62,404
	Total	8,960	142,305
30-34	**Male**	5,514	91,156
	Female	4,338	56,978
	Total	9,852	148,134
35-39	**Male**	5,379	89,522
	Female	3,941	50,113
	Total	9,320	139,635
40-44	**Male**	4,590	78,183
	Female	3,457	47,259
	Total	8,047	125,442

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Table 28. Unemployment Allowance Claimants by Age Groups

Age Ranges	Gender	İzmir	Türkiye
45-49	**Male**	2,135	37,126
	Female	2,265	32,460
	Total	4,400	69,586
50-54	**Male**	958	17,185
	Female	1,384	18,480
	Total	2,342	35,665
55-59	**Male**	379	7,371
	Female	589	7,937
	Total	968	15,308
60-64	**Male**	99	1,489
	Female	121	1,617
	Total	220	3,106
65+	**Male**	23	370
	Female	33	399
	Total	56	769
Total	**Male**	25,534	434,552
	Female	21,611	300,294
	Total	47,145	734,846

As of 2023, a total of 47,145 people were entitled to unemployment benefits in İzmir, while this number was recorded as 734,846 in Türkiye. When analyzed by age groups, it is seen that the highest number of people receiving unemployment benefits is in the 25-34 age group. In this age group, a total of 18,812 people received unemployment benefits in İzmir. There is a significant decrease in the number of individuals entitled to unemployment benefits as age increases. While the number of people aged 50 and over receiving unemployment benefits decreased significantly, only 56 people in the 65 and over age group received unemployment benefits. In terms of gender, it is noteworthy that men are more likely to benefit from unemployment benefits than women. In İzmir, 54% of unemployment benefit beneficiaries are men and 46% are women (Table 28).

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Table 29. Unemployment Allowance Beneficiaries According to Educational Background

Education Status	Gender	İzmir	Türkiye
Illiterate	**Male**	178	3,390
	Female	222	3,476
	Total	400	6,866
Literate (no formal education completed)	**Male**	371	9,005
	Female	420	7,417
	Total	791	16,422
Primary Education	**Male**	10,178	183,297
	Female	6,552	99,356
	Total	16,730	282,653
Secondary Education	**Male**	8,888	147,556
	Female	6,128	83,452
	Total	15,016	231,008
Associate Degree	**Male**	2,078	33,978
	Female	3,181	43,329
	Total	5,259	77,307
Bachelor's Degree	**Male**	3,576	53,554
	Female	4,782	59,102
	Total	8,358	112,656
Master's Degree	**Male**	260	3,629
	Female	313	4,043
	Total	573	7,672
PhD	**Male**	5	143
	Female	13	119
	Total	18	262
Total	**Male**	25,534	434,552
	Female	21,611	300,294
	Total	47,145	734,846

In 2023, the majority of individuals entitled to unemployment benefits in İzmir were primary and secondary education graduates. Of the 47,145 individuals entitled to unemployment benefits in İzmir, 16,730 are primary education graduates and 15,016 are secondary education graduates. A similar trend is observed across Türkiye, with individuals with low and middle education levels benefiting the most from unemployment insurance.

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As the level of education increases, the number of individuals entitled to unemployment benefits decreases. In İzmir, the number of associate degree graduates was recorded as 5,259 and the number of bachelor's degree graduates as 8,358. The number of individuals receiving unemployment benefits at master's and doctoral level is quite low, with only 573 master's and 18 doctoral graduates benefiting from this support in İzmir (Table 30).

Table 30. Active Labor Market Programs by Education and Program Types

Provinces\Status of Education	Disability Course			Voc. Training			On-the-Job Training Program (IEP)			General Total		
	M	F	T	M	F	T	M	F	T	M	F	T
Türkiye	**84**	**50**	**134**	**963**	**557**	**1,520**	**22,056**	**26,761**	**48,817**	**23,103**	**27,368**	**50,471**
Illiterate	3	0	3	0	0	0	33	17	50	36	17	53
Literate (no formal education completed)	1	6	7	1	6	7	636	796	1,432	638	808	1,446
Primary Education	26	13	39	120	114	234	6,237	8,943	15,180	6,383	9,070	15,453
Secondary Education	49	27	76	171	149	320	10,526	10,356	20,882	10,746	10,532	21,278
Associate Degree	3	2	5	322	106	428	2,419	3,908	6,327	2,744	4,016	6,760
Bachelor's Degree	2	2	4	337	176	513	2,161	2,683	4,844	2,500	2,861	5,361
Master's Degree	0	0	0	12	6	18	43	58	101	55	64	119
PhD	0	0	0	0	0	0	1	0	1	1	0	1
İzmir	**19**	**13**	**32**	**0**	**0**	**0**	**441**	**1,173**	**1,614**	**460**	**1,186**	**1,646**
Illiterate	0	0	0	0	0	0	1	0	1	1	0	1
Reader Author	1	0	1	0	0	0	1	11	12	2	11	13
Primary Education	6	3	9	0	0	0	126	255	381	132	258	390
Secondary Education (High School and Equivalent)	12	10	22	0	0	0	197	514	711	209	524	733
Associate Degree	0	0	0	0	0	0	35	221	256	35	221	256
Bachelor's Degree	0	0	0	0	0	0	77	168	245	77	168	245
Master's Degree	0	0	0	0	0	0	4	4	8	4	4	8
PhD	0	0	0	0	0	0	0	0	0	0	0	0

According to the data on participation in active labor market programs in İzmir and Türkiye (Table 31), the total number of people benefiting from these programs in İzmir was recorded as 1,646. In Türkiye, this number was calculated as 50,471. In terms of participation in disability courses, 32 people participated in the programs in İzmir, compared to 134 in Türkiye. Participation in on-the-job training programs (OJT) was limited to 1,614 people in İzmir, with the majority of participants being graduates of secondary education (711 people) and primary education (381 people). Participation of bachelor's and associate's degree graduates was lower.

Table 31. ISKUR Counseling and Employment Support Activities - Comparison of İzmir and Türkiye Statistics

Number of Interviews and Participants	Activities	İzmir	Türkiye
Number of Individual Interviews	Business Consultancy	142,079	2,721,841
	Vocational Counseling	2,970	44,143
	Workplace Visit	37,035	695,536
	School Visit	1,359	9,185
Number of Work Club Participants	Group Interview Availability	77,413	897,525
	Male	610	18,708
	Female	944	32,917
	Total	1,554	51,625

As of 2023, 142,079 people benefited from individual job counseling services in İzmir, compared to 2,721,841 in Türkiye. Participation in vocational counseling services was limited to 2,970 people in İzmir. The number of workplace visits to establish direct contact with employers was 37,035 while school visits amounted to 1,359. In terms of participation in job club activities, a total of 1,554 people took part in İzmir of which 944 were women and 610 were men (Table 32).

Table 32. Individual Interview by Disability, Youth, Women and Higher Education Status

Individual Interview	Gender	İzmir	Türkiye
Total Number of Interviews	**Male**	77,824	1,633,950
	Female	67,225	1,132,034
	Total	145,049	2,765.984
Young (15-24)	**Male**	14,829	394,701
	Female	12,480	272,298
	Total	27,309	666,999
Disabled	**Male**	8,292	213,143
	Female	3,257	55,286
	Total	11,549	268,429
Higher Education	**Male**	12,532	216,101
	Female	17,179	241,861
	Total	29,711	457,962

As of 2023, a total of 145,049 individual interviews were conducted in İzmir, of which 77,824 were with men and 67,225 with women. Individual interviews for young job seekers (15-24 years old) totaled 27,309, indicating that this group received intensive counseling support during the employment process. Individual interviews with people with disabilities totaled 11,549, and it is noteworthy that male people with disabilities benefit from these services more than female people. Individual interviews for higher education graduates were limited to 29,711 individuals (Table 33).

Table 33. Individual Interviews by Education Level

Education Level	Gender	İzmir	Türkiye
Illiterate	**Male**	67,225	1,132,034
	Female	145,049	2,765,984
	Total	67,225	1,132,034
Literate (no formal education completed)	**Male**	145,049	2,765,984
	Female	67,225	1,132,034
	Total	145,049	2,765,984
Primary Education	**Male**	67,225	1,132,034
	Female	145,049	2,765,984
	Total	67,225	1,132,034
Secondary Education	**Male**	145,049	2,765,984
	Female	67,225	1,132,034
	Total	145,049	2,765,984
Associate Degree	**Male**	67,225	1,132,034
	Female	145,049	2,765,984
	Total	67,225	1,132,034
Bachelor’s Degree	**Male**	145,049	2,765,984
	Female	67,225	1,132,034
	Total	145,049	2,765,984
Master’s Degree	**Male**	67,225	1,132,034
	Female	145,049	2,765,984
	Total	67,225	1,132,034
PhD	**Male**	145,049	2,765,984
	Female	67,225	1,132,034
	Total	145,049	2,765,984
Total	**Male**	67,225	1,132,034
	Female	67,225	1,132,034
	Total	145,049	2,765,984

Primary and secondary education graduates are the groups that benefit the most from individual counseling services. A total of 145,049 individual interviews were conducted in İzmir, 61,492 of which were with primary school graduates and 52,355 with secondary school graduates. While the participation of associate's and bachelor's degree graduates in individual counseling services remains at a lower level, this rate is very limited for master's and doctorate graduates (Table 33).

Table 34. ISKUR - Job Vacancies, Job Placements and Registered Unemployed

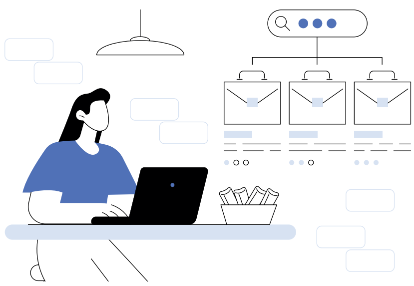
Employment Status	Gender	İzmir	Türkiye
Open Job Postings	**Total**	144,163	2,677,006
Job Placement	**Male**	35,223	772,888
	Female	28,398	464,138
	Total	63,621	1,237,026
Registered Unemployed	**Male**	52,210	1,198,172
	Female	61,514	1,222,279
	Total	113,724	2,420,451

In İzmir, the majority of ISKUR vacancies are in the private sector, and job placement rates remain low compared to the number of registered unemployed. As of 2023, there were 144,163 job vacancies in İzmir, compared to 2,677,006 in Türkiye. According to job placement data, a total of 63,621 people were employed in İzmir, of which 35,223 were male and 28,398 were female. In terms of registered unemployed, a total of 113,724 people were registered as unemployed in the city.

2.2.3 TURKSTAT Domestic and International Migration Statistics

Table 35. Internal Migration Statistics: Türkiye vs. İzmir, 2023

Migration Status	İzmir
Total Population	4,479,525
Received Migration	147,765
Migration	125,643
Net Migration	22,122
Net Migration Rate	5



İzmir is a net migrant city and its population has increased as a result of migration movements. As of 2023, İzmir received a total of 147,765 migrants and gave 125,643 migrants. Accordingly, the number of net migration is calculated as 22,122. The net migration rate is determined as 5%, which shows that İzmir is one of the attractive cities receiving migration (Table 36).

Table 36. Reasons for Migration to İzmir, 2023

Reason for Migration	İzmir
Total	147,765
Job Transfer / Change of Workplace	14,951
Starting a Job / Employment Opportunity	14,855
Education	22,061
Marital Status Change / Family Reasons	7,756
Better Housing and Living Conditions	24,222
Migration Dependent on a Household/Family Member	21,759
Returning to Homestay/Hometown	882
Health / Care	949
Purchase of Housing	3,552
Retirement / Pension	1,916
Natural Disaster / Emergency Situations	19,301
Other	5,458
Unknown / Not Specified	10,103

It is observed that most of the migrants to İzmir moved to the city for better housing and living conditions (16.4%), dependent migration on a household/family member (14.7%) and education (14.9%). In particular, 24,222 people who migrated to İzmir preferred the city for better living conditions, indicating that İzmir is an attractive city in terms of quality of life. The 22,061 people who came for education purposes reveal that İzmir is an important center for the student population. The number of people migrating for employment and transfer reasons were 14,855 and 14,951 respectively. These figures show that İzmir is a city that attracts migration in terms of economic opportunities. Overall, İzmir's reasons for migration are largely due to better living conditions, education and family reasons (Table 37).

> With its quality of life, educational opportunities, and economic prospects, İzmir has become one of Türkiye's most powerful attraction centers.

Table 37. Reasons for Out-Migration from İzmir to Other Provinces, 2023

Reason for Migration	İzmir
Total	125,643
Job Transfer / Change of Workplace	13,585
Starting a Job / Employment Opportunity	11,380
Education	18,131
Marital Status Change / Family Reasons	7,027
Better Housing and Living Conditions	24,839
Migration Dependent on a Household / Family Member	23,505
Returning to Homestay/Hometown	5,022
Health / Care	917
Purchase of Housing	4,471
Retirement /Pension	2,229
Natural Disaster / Emergency Situations	751
Other	3,447
Unknown/ Not Specified	10,339

The most common reasons for migration from İzmir are better housing and living conditions (19.8%), dependent migration (18.7%) and education (14.4%). In 2023, 125,643 people migrated from İzmir and the main reason for migration was better housing and living conditions with 24,839 people. This indicates that the population leaving the city migrated largely due to reasons such as housing prices and cost of living. The 18,131 people who left the city due to education indicate that especially the young population is taking advantage of educational opportunities outside İzmir. The number of people who migrated due to transfer or job change was 13,585, indicating that İzmir has a high mobility in terms of working population (Table 38).

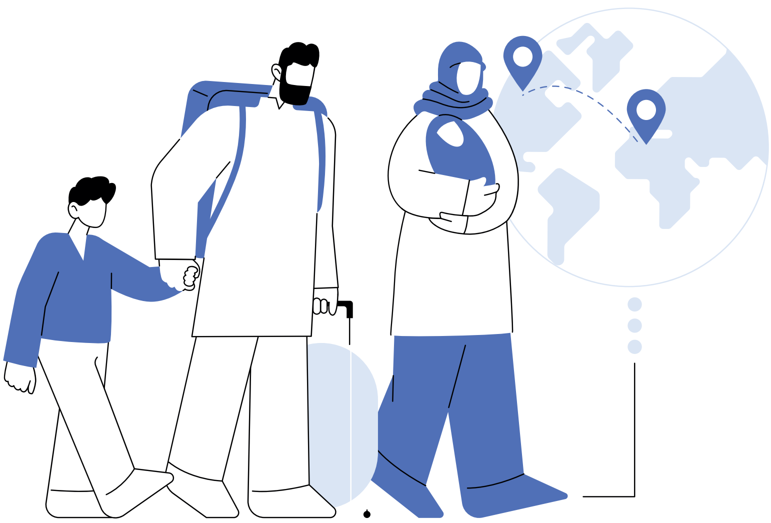
İzmir has a net migration gain of (+22,122). This indicates that migration coming to the city is higher than migration leaving the city.

Table 38. Incoming and Outgoing Migration by Gender, 2023

Migration Status	Gender	Türkiye	İzmir
Total Population		85,372,377	4,479,525
Immigration	**Total**	316,456	10,841
	Male	171,395	5,293
	Female	145,061	5,548
Emigration	**Total**	714,579	25,325
	Male	394,186	13,345
	Female	320,393	11,980
Net Migration		-398,123	-14,484

These data show migration movements by gender in İzmir and Türkiye (Table 39). The data reveals that İzmir is a net migrant city, with more people arriving than leaving the city. In 2023, a total of 147,765 people migrated to İzmir, while the number of people leaving the city was 125,643. The net migration gain is calculated as 22,122, indicating that İzmir is gaining population through migration.

In terms of gender, 74,259 of those who came to the city were male and 73,506 were female, while 63,939 of those who left İzmir were male and 61,704 were female. This situation reveals that the migrant population shows a balanced distribution on the basis of gender.



2.3 Social Security and Labor Data

2.3.1 SSI Data (Type and Distribution of Insurance, Social Security Coverage)

Table 39. Social Security Coverage (4/1-A, 4/1-B, 4/1-C), 2023

SSI Status	SSI Coverage	İzmir	Türkiye
Social Security Coverage		4,465,839	34,250,646
Active Insured	**4/1-A**	1,082,015	9,058,412
	4/1-B	177,752	1,341,932
	4/1-C	184,829	1,109,918
	Total	1,444,596	11,510,262
Income and Monthly Recipients	**4/1-A**	799,690	4,861,607
	4/1-B	156,353	871,024
	4/1-C	213,886	839,401
	Total	1,169,929	6,572,032
Dependent	**4/1-A**	738,615	6,615,826
	4/1-B	370,208	3,860,196
	4/1-C	444,019	2,480,636
	Total	1,552,842	12,956,658
Social Security Coverage, 4/1-A		2,620,320	20,535,845
Social Security Coverage, 4/1-B		704,313	6,073,152
Social Security Coverage, 4/1-C		842,734	4,429,955
Those Registered under General Health Insurance		298,472	3,211,694

According to SSI data, a total of 4,465,839 people in İzmir are covered by social security, and a significant portion of this population consists of actively insured individuals. The number of active insured individuals in İzmir is 1,444,596, of which 1,082,015 are private sector employees (4/1-A), 177,752 are covered by BAG-KUR (4/1-B) and 184,829 are public sector employees (4/1-C). A similar distribution is observed across Türkiye.

In terms of individuals receiving income and pensions, a total of 1,169,929 people in İzmir receive pensions or social assistance. In terms of dependents, 1,552,842 people benefit from health services through insured individuals. In addition, the number of people registered under General Health Insurance (GHI) is 298,472, indicating that the GHI system plays an important role in access to health services for individuals without social security in İzmir (Table 39).

Table 40. Distribution of Compulsory Insured by Gender (4/1-A, 4/1-B, 4/1-C), 2023

SSI Status	SSI Coverage	Gender	İzmir	Türkiye
4/1-A Compulsory Insured		**Male**	610,383	5,260,477
		Female	377,719	2,864,073
		Total	988,102	8,124,550
4/1-B Compulsory Insured	**Compulsory (Except Agriculture)**	**Male**	106,181	900,069
		Female	39,961	265,494
		Total	146,142	1,165,563
	Mukhtar	**Male**	412	3,335
		Female	68	222
		Total	480	3,557
	Agriculture Compulsory	**Male**	16,188	82,086
		Female	4,308	20,707
		Total	20,496	102,793
	Total 4/1-B Compulsory Insured	**Male**	122,781	985,490
		Female	44,337	286,423
		Total	167,118	1,271,913
4/1-C Compulsory Insured		**Male**	107,525	632,128
		Female	77,268	477,592
		Total	184,793	1,109,720
Total Number of Compulsory Insured			1,340,013	10,506,183

According to SSI data, a total of 1,340,013 people are compulsorily insured in İzmir. The largest group is composed of insured people with 4/1-A status, which covers private sector employees, and 988,102 people are registered in this scope. The number of male and female employees in the private sector is 610,383 and 377,719, respectively. This indicates that male employment in the private sector is dominated by men and female employment is relatively lower.

Within the scope of BAG-KUR (4/1-B), a total of 167,118 people are insured in İzmir, most of whom are self-employed men (122,781 people). The number of women insured is 44,337, indicating that a higher proportion of men are registered among small business owners and self-employed. An analysis of the number of compulsory insured people in the agricultural sector reveals that male employees (16,188 people) have a significant advantage over female employees (4,308 people). This suggests that women are more likely to work informally in agricultural activities.

A total of 184,793 people are insured in the public sector (4/1-C) in İzmir, of which 107,525 are male and 77,268 are female. Although the ratio of female employment in the public sector is more balanced than in the private sector, it is noteworthy that the number of males is numerically higher (Table 40).

Table 41. Breakdown of 4/1-A Workplaces, Compulsory Insured People and Average Daily Earnings by, Sector and Gender, 2023: Comparison of İzmir and Türkiye

4/1-A Scope	Sector	İzmir	Türkiye
Workplace	**Permanent**	138,638	1,992,551
	Temporary	10,051	186,572
	Public	2,155	46,660
	Private Sector	146,534	2,132,463
	Total	148,689	2,179,123
Compulsory Insured	**Permanent**	872,656	14,064,318
	Temporary	115,446	2,342,102
	Public	96,751	1,936,402
	Private Sector	891,351	14,470,018
	Male	610,383	10,871,438
	Female	377,719	5,534,982
	Total	988,102	16,406,420
Average Daily Earnings (TL)	**Permanent**	801,4	820,17
	Temporary	740,85	644,8
	Public	1.087,50	1.028,11
	Private Sector	760,13	764,15
	Male	860,98	835,75
	Female	688,31	723,47
	Total	794,96	797,99

These numbers show the sectoral and gender distribution of workplaces, compulsory insured people and average daily earnings based on premiums in İzmir and Türkiye as of 2023 (Table 41). According to the data, there are 148,689 workplaces in İzmir. The majority of these workplaces belong to the private sector, with 146,534 enterprises operating in the private sector. The number of workplaces in the public sector is limited to 2,155.

In terms of compulsorily insured employees, a total of 988,102 people in İzmir are insured under 4/1-A. Of these, 872,656 are employed in permanent status and 115,446 in temporary status. In terms of gender distribution, 610,383 of insured employees are male and 377,719 are female. This data shows that there are more male employees in the labor market in İzmir and that female employment remains relatively low in the private sector.

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When the average daily earnings based on premiums are analyzed, the average daily earnings of individuals working in the public sector is above those working in the private sector (760.13 TL) with 1,087.50 TL. In terms of gender, the average daily earnings of male employees is 860.98 TL, while the average daily earnings of female employees is 688.31 TL. This difference shows that gender-based wage inequality persists in the labor market. In general, İzmir's labor market is dominated by the private sector, while the public sector is more limited in terms of the number of workplaces and people employed (Table 42).

Table 42. General SSI Data Specific to İzmir, 2023

Indicator	2024.01	2024.02	2024.03	2024.04	2024.05	2024.06	2024.07	2024.08	2024.09	2024.10
Insured, Active, Total (4a, 4b, 4c)	1435216	1435925	1436222	1429842	1446231	1445376	1428754	1422346	1475828	1462477
Insured, Active, Total (4a)	1072420	1074367	1074462	1069071	1086450	1086654	1069639	1062945	1111690	1098506
Insured, Active, Total (4b)	177199	175675	176344	175821	175847	174667	175088	175487	176484	178243
Insured, Active, Total (4b) (Excluding Agriculture)	156894	155582	156402	155783	155811	155610	155632	156127	157040	18838
Insured, Active, Total (4b) (Agriculture)	20305	20123	19942	19738	19736	19479	19456	19360	19444	19405
Insured, Active, Total (4c)	185597	185883	185416	185250	184234	184055	184027	183914	187654	188728
Insured, Active, Compulsory Insured (4a)	981860	983595	984749	980224	998459	996597	1011435	1009126	1012958	998571
Insured, Active, Compulsory Insured (4b)	166574	165057	165838	165076	165043	164233	164703	165052	166022	167790
Insured, Active, Compulsory Insured (4b) (Except Agriculture and Mukhtar)	145791	144463	145421	144748	144730	144178	144688	145148	146049	147834
Insured, Active, Compulsory Insured (4b) (Agriculture)	20305	20123	19942	19738	19736	19479	19456	19360	19444	19405
Insured, Active, Compulsory Insured (4c)	185560	15845	185377	185210	184197	184019	183991	183877	187617	188690
Insured, Active, Agricultural Insured (2925 S.K.) (4a)	1019	1022	987	980	970	961	932	940	932	946
Insured, Active, Apprentice (4a)	27987	28117	27687	26669	27130	26195	14005	14735	30708	29701
Insured, Active, Interns and Trainees (4a)	53887	54058	53520	53531	52114	55204	35511	305856	59476	8480
Insured, Active, Mukhtar (4b)	478	471	475	590	577	576	359	544	529	535

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Table 42. General SSI Data Specific to İzmir, 2023

Indicator	2024.01	2024.02	2024.03	2024.04	2024.05	2024.06	2024.07	2024.08	2024.09	2024.10
Insured, Active, Other Insured (4a)	7653	7570	7545	7664	7773	7694	7741	7875	7614	7804
Insured, Active, Other Insured (4c)	37	38	39	40	37	36	36	3	37	38
Insured, Active, Optional Insured (4b)	10625	10618	10506	10445	10504	10434	10385	10435	10462	10453
Insured, Active, Optional Insured (4b) (Excluding Agriculture)	10625	10618	10506	10445	10504	10434	10385	10435	10462	10453
Insured, Active, Optional Insured (4b) (Agriculture)	0	0	0	0	0	0	0	0	0	0

The values above, which show the distribution of insured employees covered by the SSI in İzmir throughout 2024, reveal that the province's employment structure has experienced periodic changes (Table 42). The total number of insured employees, which was 1,435,216 at the beginning of the year, fluctuated throughout the year, reaching its lowest level of 1,422,346 in August and rising again to 1,475,828 in September. These changes may have been affected by seasonal employment fluctuations, economic fluctuations and sectoral employment policies.

The majority of insured employees in İzmir are in the 4/1-A status, which covers private sector employees, and the number of employees in this group fluctuated between 1,062,945 and 1,111,690 throughout the year. The number of insured employees under BAG-KUR (4/1-B) remained relatively stable, fluctuating between 174,667 and 178,243, while the 4/1-C status, which covers public sector employees, did not change significantly during the year.

2.3.2 Work Permit Statistics from the Ministry of Labor and Social Security

Table 43. Gender Breakdown of Work Permits Issued to Foreigners, 2023

Gender	İzmir	Türkiye
Female	2,966	33,449
Male	4,586	107,031
Total	7,552	140,480

In 2023, a total of 7,552 foreigners were granted work permits in İzmir, which is in the middle ranks compared to 140,480 work permits in Türkiye. On a gender basis, work permits issued to male foreigners in İzmir accounted for the majority with 4,586 work permits, while the number of work permits issued to female workers was 2,966. A similar trend is observed across Türkiye, with male foreign workers accounting for the majority of total permits with 107,031, while the number of female workers remained at 33,449 (Table 43).

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2.4 Data from the Presidency of Migration Management

Migration movements in Türkiye exhibit different dynamics in terms of foreigners living with residence permits and SuTP/IPSHA. As of February 27, 2025, 1,072,713 foreigners are living in Türkiye with a residence permit. In terms of provincial distribution, İzmir ranks sixth with 27,913 foreigners (Table 44).

Table 44. Distribution of Foreigners with Residence Permit in Türkiye by Provinces as of 27.02.2025

Province Order	Province	Total Number of Foreigners	Province Order	Province	Total Number of Foreigners
1	İstanbul	532,352	42	Kahramanmaraş	1,675
2	Antalya	105,377	43	Şanlıurfa	1,671
3	Ankara	69,667	44	Kırşehir	1,621
4	Bursa	48,169	45	Yozgat	1,589
5	Mersin	44,401	46	Bartın	1,582
6	**İzmir**	**27,913**	47	Kastamonu	1,536
7	Muğla	19,886	48	Burdur	1,521
8	Yalova	17,016	49	Çankırı	1,397
9	Sakarya	15,577	50	Ordu	1,369
10	Kocaeli	13,878	51	Gümüşhane	1,320
11	Gaziantep	9,816	52	Nevşehir	1,310
12	Aydın	9,635	53	Elazığ	1,279
13	Konya	9,481	54	Diyarbakır	1,229
14	Samsun	8,705	55	Van	1,187
15	Karabük	7,886	56	Malatya	1,152
16	Eskişehir	7,451	57	Rize	967
17	Tekirdağ	6,834	58	Niğde	959
18	Edirne	6,670	59	Mardin	957
19	Kayseri	6,257	60	Erzincan	788
20	Trabzon	6,046	61	Kars	721
21	Balıkesir	5,884	62	Karaman	708
22	Kütahya	5,312	63	Osmaniye	692

Table 44. Distribution of Foreigners with Residence Permit in Türkiye by Provinces as of 27.02.2025

Province Order	Province	Total Number of Foreigners	Province Order	Province	Total Number of Foreigners
23	Adana	4,914	64	Kilis	673
24	Bolu	4,729	65	Kırıkkale	666
25	Denizli	3,999	66	Iğdır	597
26	Kırklareli	3,661	67	Şırnak	591
27	Çanakkale	3,623	68	Amasya	557
28	Tokat	2,984	69	Hakkari	555
29	Manisa	2,864	70	Adıyaman	485
30	Afyonkarahisar	2,803	71	Batman	458
31	Hatay	2,802	72	Bitlis	458
32	Isparta	2,764	73	Ağrı	450
33	Sivas	2,616	74	Bayburt	441
34	Düzce	2,163	75	Artvin	358
35	Aksaray	2,109	76	Sinop	342
36	Uşak	2,093	77	Siirt	335
37	Çorum	2,020	78	Bingöl	316
38	Erzurum	1,984	79	Ardahan	254
39	Giresun	1,919	80	Muş	117
40	Bilecik	1,843	81	Tunceli	54
41	Zonguldak	1,816			

The values above show the distribution of the foreign population in Türkiye with a residence permit by provinces as of February 27, 2025 (Table 44).

Table 45. Distribution of Syrians under Temporary Protection by Province

Province Order	Provinces	SuTP/IPSHA	Province Population	Total Number of People Living in the Province	SuTP/IPSHA Rate
1	İstanbul	491,026	15,701,602	16,192,628	3,90%
2	Gaziantep	394,900	2,193,683	2,588,263	15,26%
3	Şanlıurfa	242,021	2,237,785	2,479,766	9,76%
4	Adana	207,333	2,200,484	2,487,817	8,33%
5	Hatay	204,067	1,562,185	1,766,252	11,55%
6	Mersin	178,783	1,954,279	2,133,062	8,81%

Table 45. Distribution of Syrians under Temporary Protection by Province

Province Order	Provinces	SuTP/IPSHA	Province Population	Total Number of People Living in the Province	SuTP/IPSHA Rate
7	Bursa	162,928	3,238,618	3,401,546	4,79%
8	Konya	115,360	2,330,028	2,445,384	4,97%
9	İzmir	112,503	4,493,242	4,605,745	2,44%
10	Kahramanmaraş	80,123	1,134,105	1,214,228	6,60%
11	Kayseri	75,212	1,452,458	1,527,670	4,92%
12	Kilis	61,306	156,738	218,045	28,12%
13	Kocaeli	49,058	2,130,006	2,179,064	2,25%
14	Mardin	45,530	1,145,911	1,191,441	4,00%
15	Osmaniye	35,603	361,062	596,668	5,97%
16	Malatya	26,508	750,491	776,995	3,41%
17	Ankara	22,147	5,864,049	5,946,196	1,38%
18	Diyarbakır	21,477	1,833,684	1,885,161	1,16%
19	Adıyaman	20,083	611,037	631,120	3,18%
20	Sakarya	14,370	1,110,735	1,125,105	1,28%
21	Manisa	12,660	1,475,353	1,488,013	0,85%
22	Denizli	12,617	1,061,371	1,073,988	1,19%
23	Batman	11,991	654,528	665,719	1,83%
24	Tekirdağ	11,086	1,167,162	1,198,208	0,90%
25	Elazığ	10,331	601,981	612,272	1,68%
26	Muğla	9,948	1,083,867	1,092,815	0,91%
27	Afyonkarahisar	8,798	750,393	758,991	1,16%
28	Aydin	7,971	1,165,943	1,173,914	0,68%
29	Samsun	7,787	1,382,376	1,390,563	0,56%
30	Burdur	7,780	775,826	783,606	2,70%
31	Eskişehir	6,723	921,630	928,353	0,72%
32	Antalya	6,710	2,722,108	2,728,853	0,25%
33	Isparta	6,098	446,409	453,402	1,54%
34	Niğde	4,788	372,708	377,496	1,27%
35	Yozgat	4,613	413,161	417,774	1,10%
36	Balıkesir	3,975	1,276,096	1,280,071	0,31%
37	Kütahya	3,940	571,078	572,072	0,70%
38	Trabzon	3,444	822,270	825,714	0,42%
39	Çorum	3,330	521,335	524,665	0,63%

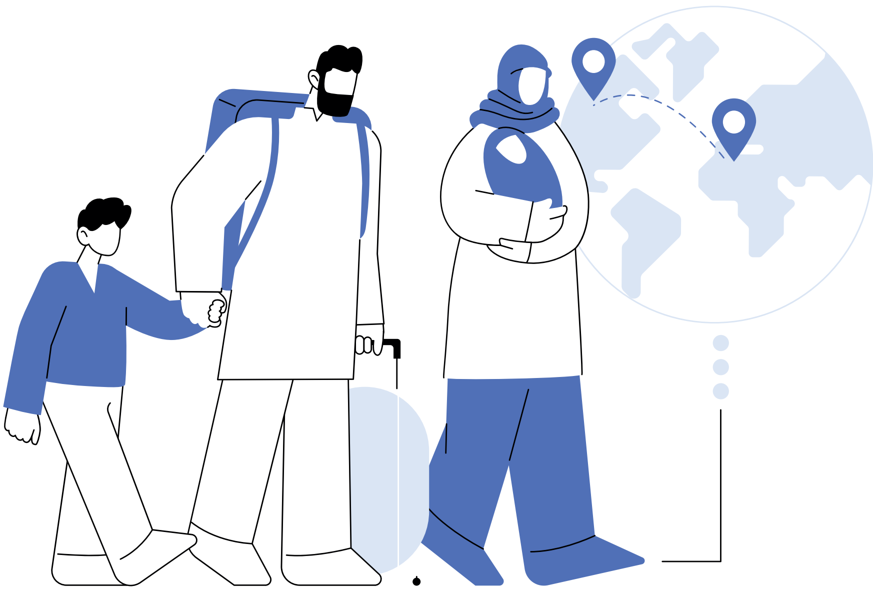
Table 45. Distribution of Syrians under Temporary Protection by Province

Province Order	Provinces	SuTP/IPSHA	Province Population	Total Number of People Living in the Province	SuTP/IPSHA Rate
40	Yalova	3,268	307,882	311,150	1,05%
41	Çanakkale	3,263	568,966	572,229	0,57%
42	Siirt	3,139	336,453	339,592	0,92%
43	Bolu	3,134	326,408	329,743	1,01%
44	Uşak	2,868	375,310	378,178	0,76%
45	Aksaray	2,847	439,474	442,321	0,64%
46	Sivas	2,768	637,007	639,775	0,43%
47	Nevşehir	1,971	317,952	319,923	0,36%
48	Şirnak	1,922	570,826	572,748	0,38%
49	Bingöl	1,711	283,278	284,447	0,41%
50	Kırıkkale	1,618	283,053	284,671	0,57%
51	Muş	1,351	392,301	393,652	0,34%
52	Tokat	1,341	612,674	613,998	0,22%
53	Kırşehir	1,308	244,546	245,850	0,53%
54	Van	1,287	1,118,087	1,119,374	0,11%
55	Düzce	1,231	412,344	413,585	0,30%
56	Amasya	1,117	342,378	343,495	0,33%
57	Karabük	1,087	250,478	251,565	0,43%
58	Kastamonu	1,080	381,991	383,071	0,28%
59	Bitlis	1,042	359,808	360,850	0,29%
60	Bilecik	908	228,495	229,403	0,40%
61	Karaman	798	262,791	263,509	0,30%
62	Erzurum	775	745,005	745,780	0,10%
63	Kırklareli	638	379,081	379,669	0,17%
64	Çankırı	535	199,981	200,516	0,27%
65	Edirne	476	421,247	421,723	0,11%
66	Zonguldak	385	586,802	587,387	0,10%
67	Ordu	377	770,711	771,088	0,05%
68	Giresun	317	455,622	456,238	0,07%
69	Bartın	244	206,715	206,959	0,12%
70	Sinop	201	226,957	227,158	0,05%
71	Kars	159	272,300	272,459	0,06%
72	Rize	131	346,797	348,108	0,30%

Table 45. Distribution of Syrians under Temporary Protection by Province

Province Order	Provinces	SuTP/IPSHA	Province Population	Total Number of People Living in the Province	SuTP/IPSHA Rate
73	Ardahan	99	91,354	91,453	0,11%
74	Gümüşhane	96	142,617	142,713	0,07%
75	Bayburt	81	83,676	83,707	0,10%
76	Iğdır	78	206,857	206,935	0,04%
77	Artvin	65	169,200	169,345	0,08%
78	Tunceli	42	86,612	86,654	0,05%
79	Ağrı	23	499,801	500,624	0,16%
80	Erzincan	12	241,238	241,351	0,01%
81	Hakkari	7	282,191	282,198	0,00%

This data shows the distribution of Syrians under temporary protection in Türkiye by province as of January 30, 2025 (Table 45). In İzmir, 113,774 Syrians are under temporary protection, which corresponds to approximately 3.6% of the total Syrian population of 2,820,362 in Türkiye. This data reveals that İzmir is one of the cities hosting the highest number of Syrians in Türkiye. The ratio of the Syrian population in İzmir to the total provincial population is approximately 2.48%.



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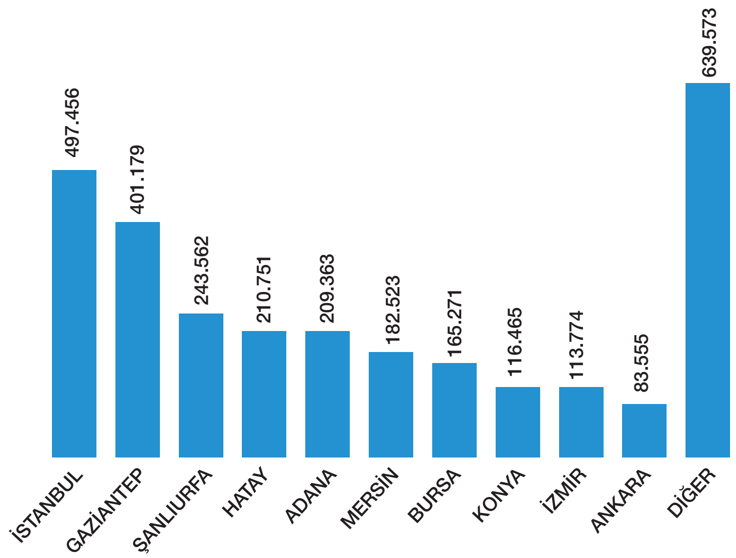
Graphic 2. Distribution of Syrians under Temporary Protection by Top 10 Provinces



*30.01.2025 as of the date

2.5 Highlighted Findings in the Analysis of Secondary Data

Population and Demographic Structure

- By 2023, İzmir's total population had reached 4,479,525 people, an increase of 0.39% compared to 2022.
- Population density is 373 people per km², well above the Turkish average of 111. This indicates that İzmir has a high urban density.
- The median age is 38.4 years. This value, which is above Türkiye's average (34), reveals that İzmir has an aging population structure.
- In terms of gender distribution, the female population (2,258,345) outnumbers the male population (2,221,180).
- Demographic trends show that the proportion of young population is decreasing and İzmir has an aging population profile.

Labor Force and Employment Statistic

- İzmir's unemployment rate is 11.4%, which is above Türkiye's average of 9.4%.
- The labor force participation rate is 54.1%, close to the average of 53.3% in Türkiye.
- The employment rate is 47.9%. Most of the working population is employed in the private sector.
- According to ISKUR data, there are 144,163 job vacancies in İzmir. The most demanded sectors are manufacturing, retail trade and service sectors.

Migration Movements and Social Security

- In 2023, İzmir is a city of net migration. 147,765 people migrated to İzmir, while 125,643 people left the city; the net migration rate is calculated as 5%.
- Better living conditions and educational opportunities are the main reasons for migration to İzmir.
- The number of people covered by social security is 4,465,839.
- The number of active insured employees is 1,444,596, the majority of whom work in the private sector.

Dynamics of the Labor Market

- In İzmir, 63,621 people were placed in jobs through ISKUR. Of these, 55% were male and 45% were female.
- The most common age range for unemployment benefit applications is 25-34. Young people in this age group face the most difficulties in finding a job.
- Women's labor force participation is lower than that of men. Likewise, women's job placement rate also lags behind men's.

CHAPTER III

CHAPTER III

3. SURVEY ANALYSIS AND FINDINGS

3.1 Demographic Data

This research was conducted in İzmir with a total of 64 participants (Table 46). Participants were mostly in the age range of 25-34 and bachelor's degree graduates. Men are slightly overrepresented compared to women. Most of the participants work in the Türk Kızılay, but private sector representation and public institutions are also important areas of work. Most of the respondents have 2-5 years of work experience, and are usually working as specialists or similar positions. In terms of age distribution, the 35-44 age range also constitutes an important group, while younger (18-24) and older (55 and above) respondents are underrepresented.

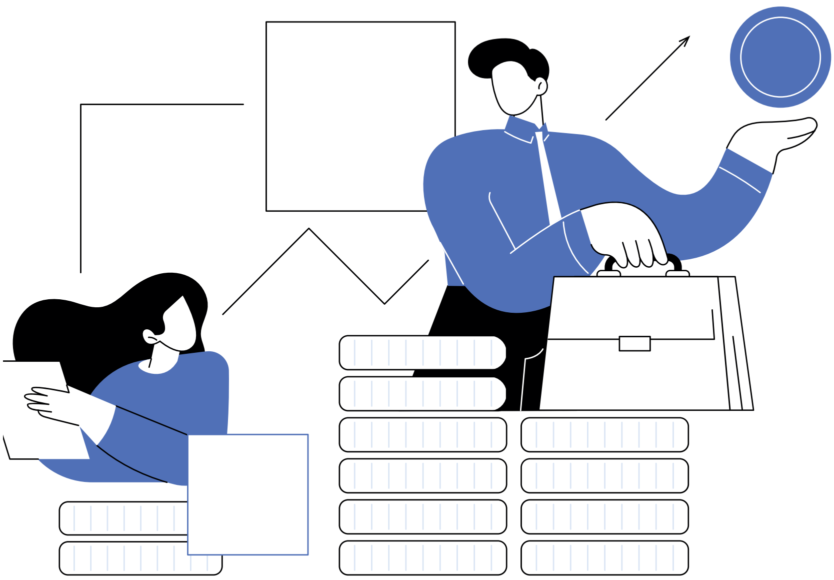
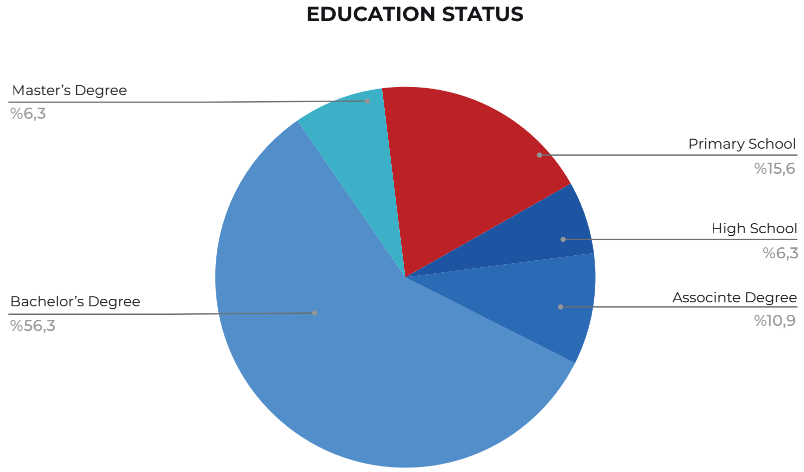
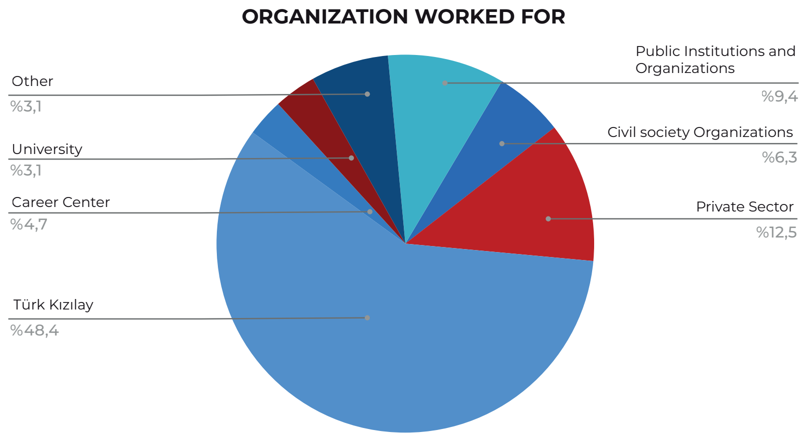


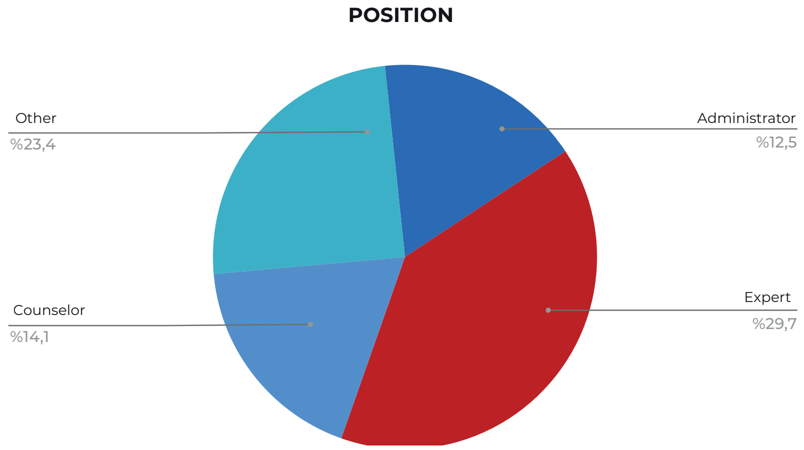
Table 46. Demographic Analysis of İzmir Participants

Demographic Information	Indicators	n	%
Gender	Woman	29	45,3
	Male	33	51,6
Age	18-24	3	4,7
	25-34	30	46,9
	35-44	14	21,9
	45-54	7	10,9
	55 Years and Older	8	12,5
Education Status	Primary School	10	15,6
	High School	4	6,3
	Associate Degree	7	10,9
	Bachelor's Degree	36	56,3
	Master's Degree	4	6,3
Years of Employment in the Institution	0-1 Year	4	6,3
	2-5 Years	28	43,8
	6-10 Years	14	21,9
	11-15 Years	9	14,1
	16 Years and Above	1	1,6
Type of Institution Employed	Public Institutions and Organizations	6	9,4
	Civil Society Organizations	4	6,3
	Private Sector Representation	8	12,5
	Türk Kızılay	31	48,4
	Other	2	3,1
	University	2	3,1
	Other	3	4,7
Position	Administrator	8	12,5
	Expert	19	29,7
	Counselor	9	14,1
	Other	15	23,4
Note= Some respondents did not answer gender, age and education information (2 missing), while 8 respondents did not answer the information on length of service and organization, and 13 respondents did not answer the information on position.			

Figure 3. Proportions of İzmir Participants by Education Level (a), Organization (b) and Position (c)







3.2 Labor Market Analysis

In order to understand the observations and views of the participants on the labor market in İzmir, they were asked to respond to the questions **"How do you assess the current situation of the labor market in your province?"** and **"What is your level of agreement with the reasons for the decline or stagnation of employment in your province?"**. In the labor market statistic section, it was observed that there were some gaps in the data and therefore, missing data analysis was carried out and the main analysis was made accordingly. However, since the missing data rate is low in some tables, missing data analysis was not performed in these tables.

While the majority of respondents believe that job opportunities have decreased due to economic difficulties in the labor market, it is also observed that the demand for skilled labor has increased in certain sectors (Table 47). This indicates that the labor market exhibits both positive and negative dynamics when analyzed on a sectoral basis.

Table 47. Labor Market Overview – İzmir

Question: How do you observe the current situation of the labor market in your province?		
Evaluations	**n**	**%**
There is a balance between job opportunities and job seekers	4	6,3
Skilled labor in specific sectors demand has increased.	21	32,8
Work due to economic difficulties, opportunities are diminished	26	40,6
There is a transition period in which new job demands are emerging and some sectors are in the process of development.	5	7,8
I don't have sufficient information to evaluate	3	4,7
Note= 5 participants did not respond.		

According to respondents, the most important reasons for the decline or stagnation of employment in İzmir are **"decline in market demand for goods or services"** and **"technological developments leading to automation"** (Table 48). These are followed by factors such as **"aging infrastructure or lack of innovation in the sector"** and **"decreasing opportunities for vocational training/capacity building"**. **"outsourcing or outsourcing of jobs to other regions or countries"** and **"aging and non-replacing workforce"** are also seen as important reasons. However, factors such as **"transition to greener and more sustainable industries"** are less recognized by the majority of respondents as a reason for employment decline. In general, economic, technological and education-related factors are perceived as the main causes of employment problems.

Table 48. Reasons for Decline or Stagnation in Employment in İzmir

Question: To what extent do you agree that the following are reasons for the decline or stagnation of employment in your province?

	Strongly Disagree		Disagree		Moderately agree		I Agree		Absolutely Agree	
Expressions*	n	%	n	%	n	%	n	%	n	%
Technological developments leading to automation	1	1,6	8	12,5	36	56,3	15	23,4	4	6,3
Shifting or outsourcing of work to other regions or countries	-	-	9	14,1	40	62,5	11	17,2	4	6,3
Decline in market demand for goods or services	1	1,6	1	1,6	40	62,5	17	26,6	5	7,8
Transition to greener and more sustainable industries	5	7,8	39	61,0	9	14,1	4	6,3	7	10,9
Aging infrastructure or lack of innovation in the sector	1	1,6	3	4,7	33	51,6	15	23,4	12	18,8
Aging and unreplaced labor force	2	3,1	5	7,8	27	42,2	22	34,4	8	12,5
High demand exceeding local talent supply	2	3,1	13	20,3	29	45,3	14	21,9	6	9,4
Reduced opportunities for vocational training/ capacity building	2	3,1	1	1,6	31	48,5	19	29,7	11	17,2

3.3 Labor Demand and Qualified Personnel Shortage

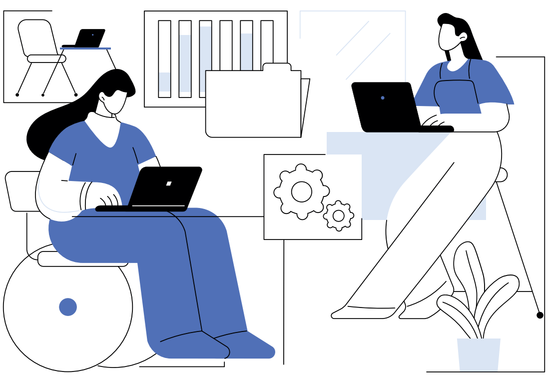
In order to understand the observations and views of the respondents on labor demand and skilled labor shortages in İzmir, the following questions were asked: **"How would you rate the importance of the following factors affecting labor demand in sectors with high demand in your province?", "Which sectors in your province are currently experiencing a shortage of skilled labor supply?", "To what extent do you agree that the following factors are the causes of the skilled labor shortage in your province?"**, "To what extent do you think there is a skills and talent gap in the following sectors in your province?", and "How effective do you think the following initiatives will be in closing the skills and talent gap in your province?”. In the labor demand and qualified personnel gap section, it was observed that there were some gaps in the data and for this reason, missing data analysis was performed and the main analysis was made accordingly.

Respondents found **“regional economic growth”** and **“incentives”** to be the most important factors affecting labor demand in high-demand sectors in the province. In addition, **“increasing technological integration in enterprises”** and **“increasing demand for qualified professionals”** also stand out as important factors (Table 49).

Table 49. Importance of Factors Affecting Labor Demand in the High Demand Sectors in İzmir

Question: How would you rate the importance of the following factors affecting labor demand in sectors with high demand in your province?

Factors	Very Insignificant		Unimportant		Moderately important		Important		Very important	
	n	%	n	%	n	%	n	%	n	%
Regional economic growth	-	-	-	-	11	17,2	43	67,2	10	15,6
Increased technological integration in enterprises	-	-	4	6,3	26	40,6	26	40,6	8	12,5
Creation of new sectors that increase labor demand	-	-	6	9,4	27	42,2	19	29,7	12	18,8
Incentives			2	3,1	12	18,8	30	46,9	20	31,3
Growing demand for skilled professionals	2	3,1	5	7,8	16	25,1	24	37,5	17	26,6
Urbanization and infrastructure projects	-	-	8	12,5	28	43,7	18	28,1	10	15,6
Changes in consumer behavior or market needs	-	-	1	1,6	29	45,3	22	34,4	12	18,8



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Respondents identified **"Agriculture, Forestry and Fisheries"** as the most common sector in İzmir where there is a shortage of qualified labor supply (Table 50). This is followed by **"Manufacturing"**, **"Education"** and **"Professional, Scientific and Technical Activitiessectors"**.

Table 50. İzmir Sectors with Shortage of Skilled Labor Supply

Question: In which sectors is there currently a shortage of qualified labor supply in your province?	
Sectors	**Marked by (respondents)**
[1] Agriculture, Forestry and Fisheries	32
[2] Mining and Quarrying	9
[3] Manufacturing	25
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	10
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	10
[6] Construction	11
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	16
[8] Transportation and Warehousing	7
[9] Accommodation and Food Service Activities	8
[10] Information and Communication	7
[11] Finance and Insurance Activities	6
[12] Professional, Scientific and Technical Activities	18
[13] Administrative and Support Service Activities	10
[14] Education	19
[15] Culture, Arts, Entertainment, Leisure and Sports	13
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	9
Notes = Respondents marked more than 1 in the sectors where there is a shortage of qualified labor supply in İzmir	

According to respondents, the most important reasons for the shortage of skilled labor in İzmir are low wages or poor working conditions (Table 51). In addition, lack of relevant training programs and migration of skilled labor to other regions or countries are also seen as important factors.

Table 51. Reasons for Skilled Labor Shortage in İzmir

Question: To what extent do you agree that the following factors are the causes of the skilled labor shortage in your province?

Causes	Strongly Disagree		Disagree		Moderately agree		I agree		Absolutely agree	
	n	%	n	%	n	%	n	%	n	%
Lack of relevant education or training programs	1	1,6	3	4,7	25	39,1	25	39,1	10	15,5
Migration of skilled labor to other regions or countries	1	1,6	6	9,4	33	51,6	16	25,0	8	12,5
Limited awareness of job opportunities	1	1,6	5	7,8	32	50,0	15	23,4	11	17,2
Rapid technological advances			12	18,8	32	50,0	16	25,0	4	6,3
Low wages or poor working conditions	-	-	1	1,6	5	7,8	38	59,4	20	31,3
Aging and unreplaced labor force	1	1,6	6	9,4	25	39,1	19	29,7	13	20,3
High demand exceeding local talent supply	4	6,3	5	7,8	30	46,9	15	23,4	10	15,6

Respondents indicated that the highest skills and talent gap in İzmir is in the manufacturing sector (Table 52). They also stated that there are significant gaps in the electricity, gas, steam and air conditioning production and distribution; professional, scientific and technical activities; and water supply, sewerage, waste management and remediation activities sectors. On the other hand, sectors such as finance and insurance activities and accommodation and food service activities have lower skills gaps.

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Table 52. Sectoral Skills and Talent Gaps in İzmir

Question: To what extent do you think there is a skills and talent gap in the following sectors in your province?

Sectors	No		Quite a few		Moderate		Too much	
Factors	n	%	n	%	n	%	n	%
[1] Agriculture, Forestry and Fisheries	1	1,6	11	17,2	45	70,3	7	10,9
[2] Mining and Quarrying	8	12,5	27	42,2	24	37,5	5	7,8
[3] Manufacturing	1	1,6	9	14,1	34	53,1	20	31,3
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	-	-	12	18,8	37	57,8	15	23,4
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	1	1,6	25	39,1	25	39,1	13	20,3
[6] Construction	2	3,1	24	37,5	30	46,9	8	12,5
[7] Wholesale and Retail Trade; of Motor Vehicles and Motorcycles	1	1,6	11	17,2	39	60,9	13	20,3
[8] Transportation and Warehousing	4	6,3	21	32,9	32	50,0	7	10,9
[9] Accommodation and Food Service	6	9,4	34	53,1	21	32,8	3	4,7
[10] Information and Communication	2	3,1	35	54,7	20	31,3	7	10,9
[11] Finance and Insurance	4	6,3	38	59,4	20	31,3	2	3,1
[12] Professional, Scientific and Technical	3	4,7	26	40,6	21	32,8	14	21,9
[13] Administrative and Support Service Activities	3	4,7	34	53,1	23	35,9	4	6,3
[14] Education	4	6,3	33	51,5	20	31,3	7	10,9
[15] Culture, Arts, Entertainment, Leisure and Sports	4	6,3	39	61,0	18	28,1	3	4,7
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	5	7,8	35	54,7	16	25,0	8	12,5

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The respondents were of the view that the most effective initiatives to close the skills and talent gap in the province were cooperation between enterprises and educational institutions and improved career counseling and guidance in schools (Table 53). Sector-specific training programs were found to be moderately effective by the respondents.

Table 53. Impact of Enterprises on Closing the Talent and Skills Gap in İzmir

Question: How effective do you think the following initiatives will be in closing the skills and talent gap in your province?										
Initiatives	**Highly ineffective**		**Ineffective**		**Moderately effective**		**Effective**		**Very effective**	
Factors	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Sector-specific training programs	1	1,6	1	1,6	30	46,9	25	39,1	7	10,9
Cooperation between businesses and educational institutions	-	-	1	1,6	7	10,9	41	64,1	15	23,4
Enhanced career counseling and guidance in schools	-	-	5	7,8	8	12,5	31	48,4	20	31,3

3.4 Migrant Workers and Employment of People with Disabilities

In order to understand the observations and views of the participants on the employment of migrant workers and people with disabilities in İzmir, we asked them **“What is your general perception of the employment of migrant workers in your organization or in your province?”, “To what extent do the following factors influence decisions regarding the employment of migrant workers in your province?”, “How do you assess the impact of employing migrant workers on the following factors in the organizations in your province?”, “To what extent do the organizations in your province experience the following challenges in the employment of migrant workers?”, “What is your general perception of the employment of people with disabilities in organizations in your province?”, “How do you assess the impact of employees with disabilities on the following aspects of organizations in your province?”, “In your opinion, which stage of the recruitment process poses the greatest challenge for organizations when hiring migrant workers?” and “What is your view on the existence of specific policies or strategies to address the challenges faced by organizations in your province in hiring migrant workers?”**. In the section on migrant workers and employment of people with disabilities, it was observed that there were some gaps in the data and therefore a missing data analysis was conducted and the main analysis was conducted accordingly.

Participants’ perception of migrant labor employment in İzmir is generally neutral (Table 54)With a rate of 42.2%, the majority stated that they have neither a positive nor a negative perception of migrant labor employment. However, 29.7% had a positive perception and 9.4% had a very positive perception, while 15.6% had a negative perception and 3.1% had a very negative perception. These results show that the general perception towards migrant labor employment is mostly neutral and positive.

Table 54. General Perception of Migrant Labor Employment in İzmir

Question: What is your general perception of migrant labor employment in your organization or province?		
Answers	**n**	**%**
Strongly Positive	6	9,4
Positive	19	29,7
Neither positive nor negative	27	42,2
Negative	10	15,6
Strongly Negative	2	3,1

Respondents indicated that lower labor costs, ease of filling vacancies quickly, and availability of skills not available locally most influenced their decision to hire migrant workers in İzmir (Table 55). Of the other factors, high work ethic and trustworthiness and concerns about cultural or language differences were rated as having a moderate influence.

Table 55. Factors Affecting Decisions on the Employment of Migrant Workers in İzmir

Question: To what extent do the following factors influence decisions regarding the employment of migrant workers in your province?										
	Not effective at all		**Not effective**		**Moderately effective**		**Effective**		**Very effective**	
Factors	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Availability of Skills not Available Locally	2	3,1	5	7,8	23	36,0	24	37,5	10	15,6
Lower Labor Costs	-	-	1	1,6	10	15,6	28	43,8	25	39,1
High Work Ethics and Reliability	3	4,7	9	14,1	39	60,9	8	12,5	5	7,8
Flexibility in Work Schedules	1	1,6	9	14,1	28	43,8	21	32,8	5	7,8
Diversity and Inclusion Initiatives	4	6,3	7	10,9	29	45,3	17	26,6	7	10,9
Ease of Filling Vacancies Quickly	3	4,7	5	7,8	23	35,9	16	25,0	17	26,6
Concerns About Cultural or Language Differences	-	-	7	10,9	32	50,0	20	31,3	5	7,8

Respondents generally assessed the impact of migrant labor on organizations in the province as neutral (Table 56). In the factors of team dynamics and cooperation (42.2%), productivity levels (56.3%), innovation and creativity (54.6%) and workplace culture (56.3%), the majority indicated that the impact of migrant workers was neither positive nor negative. However, it is noteworthy that a positive impact was also observed, particularly in the factors of team dynamics and collaboration (29.7%) and productivity levels (29.7%). The negative impact remained at lower rates.

Table 56. Impact of Employing Migrant Workers on Institutions in İzmir

Question: How do you assess the impact of migrant labor on the following factors in institutions in your province?										
Factors	**Very Negative**		**Negative**		**Neither positive nor negative**		**Positive**		**Very positive**	
	n	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Team Dynamics and Collaboration	3	4,7	12	18,8	27	42,2	19	29,7	3	4,7
Productivity Levels	3	4,7	3	4,7	36	56,3	19	29,7	3	4,7
Innovation and Creativity	3	4,7	6	9,4	35	54,6	19	29,7	1	1,6
Workplace Culture	4	6,3	7	10,9	36	56,3	14	21,9	3	4,7

According to respondents, the most common challenges faced by organizations in the province in employing migrant workers are workplace integration with local staff, cultural adaptation issues and language or communication barriers. In general, it can be said that the biggest challenges in the employment of migrant workers are in the areas of integration, language barriers and cultural adaptation, whereas there are fewer difficulties in filling vacant positions.

Respondents indicated that organizations in İzmir most often face language or communication barriers and cultural adaptation issues when recruiting migrant workers (Table 57). Ease of filling vacancies quickly (15.6% overall challenges) and concerns about cultural or language differences (14.1% overall challenges) were rated as lesser but still significant challenges. In addition, legal or regulatory compliance and workplace integration with local staff were also highlighted as important challenges.

Table 57. Challenges Faced by Organizations Employing Migrant Workers in İzmir

Question: Assess the extent to which the following challenges in the employment of migrant workers are experienced by the organizations in your province.

Factors	No difficulties at all		Very few difficulties		Experiencing moderate difficulty		Experiencing too much difficulty		It's a complete challenge	
	n	%	n	%	n	%	n	%	n	%
Language or communication barriers	1	1,6	3	4,7	29	45,3	25	39,1	6	9,4
Cultural adaptation issues	2	3,1	3	4,7	31	48,4	22	34,4	6	9,4
Legal or regulatory compliance	1	1,6	1	1,6	40	62,5	19	29,7	3	4,7
Costs related to recruitment or training	4	6,3	7	10,9	29	45,3	18	28,1	6	9,4
Workplace integration with local staff	2	3,1	4	6,3	40	62,5	12	18,8	6	9,4
Ease of filling vacancies quickly	5	7,8	9	14,1	34	53,1	6	9,4	10	15,6
Concerns about cultural or language differences	2	3,1	5	7,8	36	56,3	12	18,8	9	14,1

Respondents indicated that the biggest challenge in recruiting migrant workers is the legal and regulatory phase (62.5%) (Table 58). This is followed by identifying and attracting qualified candidates (15.6%) and hiring and training (15.6%). Integration into workplace culture (6.3%) is seen as a relatively lesser challenge.

Table 58. Challenges in the Recruitment Process of Migrant Workers

Question: Which stage of the recruitment process do you think poses the biggest challenge for organizations when hiring migrant workers?

Answers	n	%
Identify and Attract Qualified Candidates	10	15,6
Legislation	40	62,5
Recruitment and Training	10	15,6
Integrating Them into Workplace Culture	4	6,3

Respondents indicated that the vast majority of organizations in the province have limited policies in place to address challenges in recruiting migrant workers (54.7%) (Table 59). However, 37.5% stated that organizations do not have a specific policy in this regard. Only a small proportion of 7.8% think that organizations have comprehensive policies. These results indicate that policies for migrant employment are generally perceived as inadequate or incomplete.

Table 59. Policies and Strategies for the Recruitment Process of Migrant Workers

Question: What is your view on whether organizations in your province have specific policies or strategies to address challenges in recruiting migrant workers?		
Answers	**n**	**%**
Yes, they have comprehensive policies.	5	7,8
Yes, but the policies are quite limited.	35	54,7
No, they don't have a specific policy.	24	37,5

Participants evaluated the general perception of the employment of people with disabilities in İzmir institutions as neutral (37.5% neither positive nor negative) (Table 60). However, 26.6% stated that they have a positive perception and 10.9% stated that they have a very positive perception. On the other hand, 25.0% had a negative perception, while no respondent reported a very negative perception. These results show that the perception towards employment of the disabled is generally between neutral and positive.

Table 60. General Perception on Employment of People with Disabilities in Institutions in İzmir

Question: What is your general perception regarding the employment of people with disabilities in institutions in your province?		
Answers	**n**	**%**
Strongly Positive	7	10,9
Positive	17	26,6
Neither Positive nor Negative	24	37,5
Negative	16	25,0
Strongly Negative	-	-

Respondents generally assessed the impact of employees with disabilities on organizations in İzmir as neutral (Table 61). In the factors of team dynamics and collaboration (54.7%), productivity levels (62.5%), innovation and creativity (54.7%) and workplace culture (65.6%), the majority stated that the impact of employees with disabilities is neither positive nor negative. However, the rate of those who consider it as a positive impact is also noteworthy; positive impact was observed especially in the factors of team dynamics and cooperation (28.1% positive and 10.9% very positive) and innovation and creativity (21.9% positive and 12.5% very positive). The negative impact remained at lower rates.

Table 61. The Impact of Disabled Employees on the Performance of Organizations in İzmir

Question: How do you assess the impact of employees with disabilities on the following aspects of organizations in your province?

Organisation Aspects	Very Negative		Negative		Neither positive nor negative		Positive		Very positive	
Factors	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Team Dynamics and Collaboration	1	1,6	3	4,7	35	54,7	18	28,1	7	10,9
Productivity Levels	1	1,6	7	10,9	40	62,5	10	15,6	6	9,4
Innovation and Creativity	1	1,6	6	9,4	35	54,7	14	21,9	8	12,5
Workplace Culture	1	1,6	4	6,3	42	65,6	11	17,2	6	9,4

3.5 Women Labor Force

In order to understand participants' observations and views on the female workforce in İzmir, they were asked to respond to the questions **"How prevalent do you believe the following skills are in the female workforce in your province?", "To what extent do you think the following factors limit the representation of women in certain occupations in your province?", and "How critical do you think the following actions are to better support the female workforce and utilize their skills in various occupations?"**. In the female labor force section, it was observed that there were some gaps in the data and therefore a missing data analysis was conducted and the main analysis was conducted accordingly.

Respondents believe that the most common skills in the female workforce in İzmir are communication and interpersonal skills, adaptability and multitasking, creativity and innovation (Table 62). In addition, problem solving and critical thinking skills are also significantly prevalent.

> **Among the prominent skills of the female workforce in İzmir are communication, adaptability, and creativity, while competencies in critical thinking and problem-solving also highlight the presence of strong potential.**

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Table 62. Skills of the Female Labor Force in İzmir

Question: To what extent do you think the following skills are present among women in the labor market in your province?

Actions	Strongly Disagree		Disagree		Moderately Agree		I Agree		Absolutely Agree	
Skills	n	%	n	%	n	%	n	%	n	%
Leadership and decision making	4	6,3	6	9,4	33	51,6	15	23,4	6	9,4
Communication and interpersonal skills	3	4,7	3	4,7	24	37,5	26	40,6	8	12,5
Organization and time management	3	4,7	1	1,6	35	54,7	17	26,6	8	12,5
Creativity and innovation	3	4,7	4	6,3	22	34,4	21	32,8	14	21,9
Technical skills (e.g. coding, data analysis)	5	7,8	7	10,9	28	43,8	18	28,1	6	9,4
Problem solving and critical thinking	-	-	6	9,4	33	51,6	10	15,6	15	23,4
Adaptability and multitasking	1	1,6	6	9,4	28	43,8	11	17,2	18	28,1

Participants indicate that the biggest obstacles to women's professional representation in İzmir are male-dominated sectors and cultural/societal expectations (Table 63). In addition, the lack of work-life balance policies also stands out as an important limiting factor.

Table 63. Factors Limiting the Female Labor Force in İzmir

Question: To what extent do you think the following factors limit the representation of women in certain occupations in your province?										
	Strongly Disagree		**Disagree**		**Moderately Agree**		**I Agree**		**Absolutely Agree**	
Factors	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Cultural or societal expectations	1	1,6	3	4,7	19	29,7	29	45,3	12	18,8
Limited access to education and training in certain areas	1	1,6	8	12,5	25	39,1	21	32,8	9	14,1
Gender discrimination in recruitment and promotion	-	-	9	14,1	26	40,6	17	26,6	12	18,8
Lack of work-life balance policies	-	-	3	4,7	23	35,9	28	43,8	10	15,6
Male-dominated sectors	1	1,6	3	4,7	18	28,2	27	42,2	15	23,4

Respondents consider gender-neutral hiring practices and policies such as flexible working hours and childcare support to be the most critical actions in supporting the female workforce (Table 64). In addition, promoting women to leadership roles was also seen as an important step.

Table 64. Factors Limiting the Female Labor Force in İzmir

Question: How critical do you think the following actions are to better support the female workforce and utilize their skills in various occupations?										
	Not Critical at All		**Not Critical**		**Moderately Critical**		**Critical**		**Very Critical**	
Factors	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Implement gender-neutral recruitment practices	-	-	4	6,3	7	10,9	34	53,2	19	29,7
Offer flexible working hours and childcare support	2	3,1	-	-	11	17,2	26	40,6	25	39,1
Increase access to technical and vocational training programs	1	1,6	1	1,6	22	34,4	32	50,0	8	12,5
Promoting women into leadership roles	-	-	8	12,5	15	23,4	25	39,1	16	25,0

3.6 Technological Change and its Effects on Labor Force

In order to understand the observations and views of the participants in İzmir on technological change and its impact on the workforce, asked them **"How do you think new technologies (e.g. artificial intelligence, automation, green technologies) will affect the labor market in your province", "What types of occupations or areas of expertise do you believe will be most in demand in the next 10 years?", "Please rate the likelihood that each of the following occupations will be in high demand in the future due to technological developments.", "What are the biggest challenges in adapting the labor market to new technological and industrial developments?", "Which skills do you think are the most critical for workers in the future labor market?", "Do you believe that the private sector in your province is investing enough to prepare the workforce for technological changes?", "Which of the following group(s) do you think would benefit the most from technological developments in the labor market?", "Which group do you think has the highest risk of job loss due to technological developments?", "Which measures should be prioritized to address the impact of technology on the labor market?", and "How ready is your province to respond to changes in the labor market caused by new technologies?**. In the section on technological change and its impact on the labor force, it was observed that there were some gaps in the data and therefore a missing data analysis was conducted and the main analysis was made accordingly.

Respondents generally assessed the impact of new technologies (such as artificial intelligence, automation, green technologies) on the labor market in İzmir as neutral (40.6% neither positive nor negative). However, 29.7% expect a somewhat positive impact and 17.2% expect a very positive impact. On the other hand, 9.4% expect a somewhat negative impact and 3.1% expect a very negative impact. These results show that the impact of new technologies on the labor market is generally perceived as neutral to positive (Table 65).

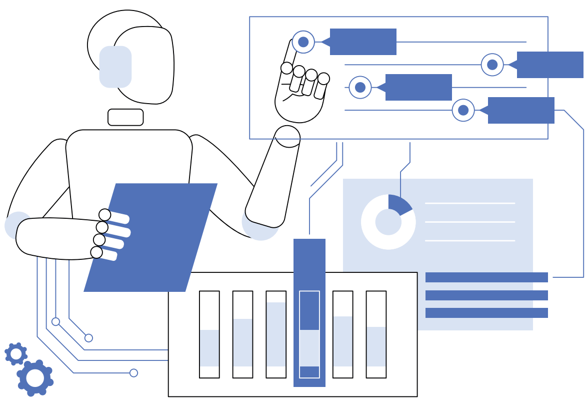

Table 65. Impact of New Technologies on the Labor Market in İzmir

Question: How do you think new technologies (e.g. artificial intelligence, automation, green technologies) will affect the labor market in your province?		
Answers	**n**	**%**
Strongly Positive	11	17,2
Slightly Positive	19	29,7
Neither Positive nor Negative	26	40,6
Slightly Negative	6	9,4
Strongly Negative	2	3,1

According to the participants, technology-oriented professions (such as artificial intelligence, software, cyber security) and fields related to digital transformation (such as e-commerce, digital marketing) stand out as the professions that will be most in demand in the next 10 years. In addition, fields such as renewable energy and robotics/automation are also likely to play an important role in the future (Table 66).

Table 66. Occupations or Specialties that will be in the Highest Demand in 10 Years

Question: What professions or specialties do you believe will be most in demand in the next 10 years?	
Profession or specialization	**Marked by (respondents)**
[1] E-commerce and supply chain expert	34
[2] Animation	7
[3] R&D	14
[4] Artificial Intelligence and Machine Learning Experts	39
[5] Data Scientists and Data Analysts .	13
[6] Cyber Security	22
[7] Renewable Energy Technicians (e.g. solar panel installers, wind turbine technicians)	18
[8] Software Developers and Engineers	32
[9] Healthcare workers (e.g. nurses, doctors, medical technicians)	9
[10] Digital Marketing Experts	16
[11] Crafts (e.g. electricians, plumbers, welders)	2
[12] Educators and Trainers in Technology and Digital Skills	5
[13] Information Security Specialist	19
[14] Computer Games Programmer	3

Table 66. Occupations or Specialties that will be in the Highest Demand in 10 Years

Question: What professions or specialties do you believe will be most in demand in the next 10 years?	
Profession or specialization	**Marked by (respondents)**
[15] Cloud Computing Specialist	1
[16] Environmental Scientists and Sustainability Consultants	7
[17] Financial Analysts and FinTech Experts	1
[18] Robotics Engineers and Automation Specialists	20
[19] Social Workers and Counselors	6
[20] Digital Forensics Expert	7
[21] Social Media Specialist	9
[22] Micro Process Designer	6
[23] Enterprise Resource Planning Specialist	4
Notes = Respondents marked more than 1 occupation and specialization	

According to the participants, technology-oriented professions (such as artificial intelligence, cyber security, software) and fields related to digital transformation (such as e-commerce, digital marketing) stand out as the professions that will be most in demand in the future (Table 67). In addition, robotics and automation are also in high demand.

Table 67. Demand Probability of Occupations According to Technological Developments

Question: Please assess the likelihood that each of the following occupations will be in high demand in the future due to technological developments.						
	Low		**Middle**		**High**	
Profession or Specialization	**n**	**%**	**n**	**%**	**n**	**%**
[1] E-commerce and Supply Chain Expert	4	6,3	19	29,7	41	64,1
[2] Animation Programmer	5	7,8	39	61,0	20	31,3
[3] R&D Staff	3	4,7	40	62,5	21	32,8
[4] Artificial Intelligence and Machine Learning Experts	1	1,6	22	34,4	41	64,1
[5] Data Scientists and Data Analysts	1	1,6	32	50,0	31	48,4
[6] Cyber Security Experts	1	1,6	27	42,2	36	56,3
[7] Renewable Energy Technicians (e.g. solar panel installers, wind turbine technicians	1	1,6	40	62,5	23	35,9
[8] Software Developers and Engineers	4	6,3	28	43,8	32	50,0
[9] Healthcare Workers (e.g. nurses, doctors, medical technicians	7	10,9	40	62,5	17	26,6
[10] Digital Marketing	2	3,1	37	57,9	25	39,1
[11] Crafts (e.g. electricians, plumbers, welders	11	17,2	38	59,4	15	23,4

Table 67. Demand Probability of Occupations According to Technological Developments

Question: Please assess the likelihood that each of the following occupations will be in high demand in the future due to technological developments.						
	Low		**Middle**		**High**	
[12] Educators and Trainers in Technology and Digital Skills	1	1,6	41	64,1	22	34,4
[13] Information Security Specialist	1	1,6	40	62,5	23	35,9
[14] Computer Games Programmer	4	6,3	43	67,2	17	26,6
[15] Cloud Computing Specialist	2	3,1	42	65,6	20	31,3
[16] Environmental Scientists and Sustainability Consultants	5	7,8	43	67,2	16	25,0
[17] Financial Analysts and FinTech Experts	5	7,8	41	64,1	18	28,1
[18] Robotics Engineers and Automation Specialists	2	3,1	32	50,0	30	46,9
[19] Social Workers and Counselors	8	12,5	40	62,5	16	25,0
[20] Digital Forensics Expert	2	3,1	40	62,5	22	34,4
[21] Social Media Specialist	1	1,6	39	60,9	24	37,5
[22] Micro Process	1	1,6	39	60,9	24	37,5
[23] Enterprise Resource Planning Specialist	6	9,4	41	64,1	17	26,6

According to respondents, lack of infrastructure and high costs are the biggest obstacles for the labor market to adapt to technological and industrial developments. In addition, resistance to change, lack of skilled labor and access to education also stand out as important challenges (Table 68).

Table 68. Challenges in Adapting to New Technological and Industrial Developments

Question: What are the biggest challenges for the labor market to adapt to new technological and industrial developments?	
Answers	**Number of Marks**
Lack of skilled labor force	32
Limited access to education and training	32
Resistance to change in organizations	33
High costs of adopting new technologies	34
Lack of Infrastruture	36
Notes = Participants selected more than 1 option	

According to respondents, technical expertise in emerging technologies stands out among the most critical skills for workers in the future labor market (Table 69). This is followed by digital literacy and problem solving.

Table 69. Most Critical Skills for Employees in the Future Labor Market

Question: Which skills do you think are the most critical for workers in the future labor market?	
Skills	**Number of Marks**
Digital Literacy	33
Problem Solving	33
Critical Thinking	24
Communication Skills	28
Technical Expertise in Emerging Technologies	41
Notes = Participants selected more than 1 option.	

According to the findings, the majority of respondents (62.5%) think that the private sector in İzmir does not invest enough to prepare its workforce for technological changes (Table 70). This result shows that there is a strong perception that the private sector needs to invest more in adapting to technology.

Table 70. Investments of the Private Sector in İzmir in Preparing the Labor Force for Technological Changes

Question: Do you believe that the private sector in your province is investing enough to prepare its workforce for technological changes?		
Options	**n**	**%**
Yes	24	37,5
No	40	62,5

According to respondents, entrepreneurs and middle managers will benefit the most from technological developments in the labor market (Table 71).

Table 71. Groups that can Benefit from Technological Developments

Question: Which of the following group(s) do you think would benefit the most from technological developments in the labor market?		
Options	**n**	**%**
Highly Skilled Workers	8	12,5
Low-Skilled Workers	1	1,6
Middle Managers	27	42,2
Entrepreneurs	28	43,8

According to respondents, the highest risk group for job loss due to technological developments is low-skilled workers (Table 72). This is followed by older workers.

Table 72. Highest Likelihood of Job Loss due to Technological Developments

Question: Which group do you think is most at risk of job loss due to technological advances?		
Options	**n**	**%**
Low-Skilled Workers	32	50,0
Mid-Career Professionals	12	18,7
Older Workers	20	31,3

Respondents indicate that training and skills development programs are the most critical measure to manage the impact of technology on the labor market. Government-sponsored employment programs, business-education institution partnerships, and lifelong learning initiatives also emerged as important priorities (Table 73).

Table 73. Measures to Address the Impact of Technology on the Labor Market

Question: Which measures should be prioritized to address the impact of technology on the labor market?	
Options	**Number of Marks**
Expansion of training and upskilling programs	51
Providing incentives for sectors to adopt technology responsibly	39
Strengthening cooperation between businesses and educational institutions	42
State-Led employment support programs	45
Promoting lifelong learning initiatives	42
Notes = Participants selected more than 1 option.	

Respondents believe that İzmir is partially prepared to respond to changes in the labor market caused by new technologies. 78.1% stated that they were somewhat prepared, while 20.3% stated that they were not prepared at all. Only a small group of 1.6% think that they are very prepared. These results indicate that the province is moderately prepared to adapt to technological changes, but that a significant number of people feel deficiencies in this regard (Table 74).

Table 74. Readiness for Changes in the Labor Market Caused by New Technologies

Question: How prepared is your province to respond to changes in the labor market caused by new technologies?		
Options	**n**	**%**
Very Prepared	1	1,6
A Little Prepared	50	78,1
Not Prepared at All	13	20,3

3.7 Sectoral and Regional Labor Dynamics

In order to understand the observations and views of respondents in İzmir on sectoral and regional labor force dynamics, asked them **"How do you assess the impact of the following factors on the development of sectors in your province?", "Do you believe that cultural factors (such as traditions, local preferences or heritage) are more influential than economic factors (such as investments, policy or market demand) in the prominence or decline of sectors in your region?", "Which sectors do you think are currently facing the most significant talent and skills shortages?", "Which sectors in your province do you think will have high labor demand?", and "Which sectors in your province are most likely to be affected by technological developments?"**. In the section on sectoral and regional labor force dynamics, it was observed that there were some gaps in the data and therefore a missing data analysis was conducted and the main analysis was made accordingly.

Respondents cite government incentives, infrastructure investments and migration trends as the most important factors in the development of sectors in İzmir. Changes in consumer demand and labor skills also play an important role (Table 75).

Table 75. Factors that may Affect the Development of Sectors in İzmir

Question: How do you assess the impact of the following factors on the development of sectors in your province?										
Factors	**Strongly Disagree**		**Disagree**		**Moderately agree**		**I agree**		**Absolutely agree**	
Statements	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Cultural heritage or traditions specific to the region	1	1,6	11	17,2	32	50,0	15	23,4	5	7,8
Availability or scarcity of natural resources*	-	-	11	17,2	29	45,3	18	28,1	6	9,4
Government incentives	1	1,6	4	6,3	13	20,3	29	45,3	17	26,6
Changes in local or international consumer demand	-	-	2	3,1	23	35,9	24	37,5	15	23,4
Investing in regional infrastructure and development	1	1,6	5	7,8	15	23,4	29	45,3	14	21,9
Labor skills and education levels	-	-	3	4,7	28	43,8	22	34,4	11	17,2
Migration trends (e.g. rural-urban or international migration)	1	1,6	5	7,8	16	25,0	25	39,1	17	26,6

The vast majority of respondents think that economic factors are more influential than cultural factors in the development or decline of sectors in the region (Table 76). However, some respondents indicated that both factors are equally important, while those who think that cultural factors are more dominant are in the minority.

Table 76 . Cultural and Economic Factors in the Promotion or Decline of Sectors in the Region

Question: Do you believe that cultural factors (such as traditions, local preferences or heritage) are more influential than economic factors (such as investments, policy or market demand) in the promotion or decline of sectors in your region?

Answers	n	%
Yes, cultural factors are more influential.	8	12,5
No, economic factors are more influential.	40	62,5
Both are equally effective.	11	17,2
I'm not sure.	5	7,8

The majority of respondents indicated that the agriculture, manufacturing, professional and technical activities and education sectors face the most serious skills shortages in İzmir. In addition, wholesale and retail trade and other service activities are also among the sectors facing significant skills shortages (Table 77)

Table 77. İzmir Sectoral Talent and Skills Gap

Question: Which sectors do you think are currently facing the most significant talent and skills shortages? (You can choose more than one option.)

Sectors	Number of markings
[1] Agriculture, Forestry and Fisheries	25
[2] Mining and Quarrying	4
[3] Manufacturing	24
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	12
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	11
[6] Construction	5
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	16
[8] Transportation and Warehousing	7
[9] Accommodation and Food Service Activities	3
[10] Information and Communication	12
[11] Finance and Insurance Activities	7

Table 77. İzmir Sectoral Talent and Skills Gap

Sectors	Number of Markings
[12] Professional, Scientific and Technical Activities	19
[13] Administrative and Support Service Activities	5
[14] Education	19
[15] Culture, Arts, Entertainment, Leisure and Sports	3
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	14
Notes = Respondents marked more than 1 for the sectors with the most critical talent and skills gaps in İzmir	

The majority of respondents indicate that manufacturing, agriculture, accommodation and food services, professional and technical activities and other service activities are the sectors with the highest labor demand in İzmir (Table 78). In addition, wholesale and retail trade and education sectors are also among the areas where high labor demand is expected.

Table 78. Sectors with High Labor Demand in İzmir

Question: Which sectors in your province do you think will have high labor demand?	
Sectors	Number of Markings
[1] Agriculture, Forestry and Fisheries	32
[2] Mining and Quarrying	12
[3] Manufacturing	38
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	20
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	22
[6] Construction	24
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	28
[8] Transportation and Warehousing	22
[9] Accommodation and Food Service Activities	32
[10] Information and Communication	20
[11] Finance and Insurance Activities	19
[12] Professional, Scientific and Technical Activities	31
[13] Administrative and Support Service Activities	18
[14] Education	28
[15] Culture, Arts, Entertainment, Leisure and Sports	19
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	31
Notes =Participants marked more than 1 sector	

The majority of respondents think that manufacturing, information and communication, professional and technical activities and education sectors have the most potential to be affected by technological developments in İzmir. Agriculture and other service activities are also among the sectors that could be significantly affected by technological transformation (Table 79).

> **Participants indicate that government incentives, infrastructure investments, and migration trends are among the key factors driving the development of sectors in İzmir. Moreover, shifts in consumer demand and workforce skills also play a significant role.**

Table 79. İzmir Sectors' Likelihood of Being Affected by Technological Developments

Question: Which sectors in your province are most likely to be affected by technological developments?	
Sectors	**Number of Markings**
[1] Agriculture, Forestry and Fisheries	26
[2] Mining and Quarrying	16
[3] Manufacturing	40
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	18
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	22
[6] Construction	22
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	24
[8] Transportation and Warehousing	24
[9] Accommodation and Food Service Activities	22
[10] Information and Communication	36
[11] Finance and Insurance Activities	22
[12] Professional, Scientific and Technical Activities	36
[13] Administrative and Support Service Activities	18
[14] Education	27
[15] Culture, Arts, Entertainment, Leisure and Sports	21
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	25
Notes = Respondents marked more than 1 sector	

3.8 Links between Education and Employment

In order to understand the observations and views of respondents in İzmir on the **"links between education and employment"**, they were asked to respond to the questions **"To what extent are the current education and training programs in your province effective in preparing workers for technological and industrial developments?"** and **"To what extent are the following roles of universities and career centers in your province important in helping people adapt to new technologies in the job market?"**. In the section on linkages between education and employment, it was observed that there were some gaps in the data and therefore a missing data analysis was carried out and the main analysis was conducted accordingly.

The findings show that education and training programs in İzmir are partially effective in adapting to technological and industrial developments, but a significant number of people think that these programs are insufficient. It is understood that improvements are needed to increase the effectiveness of the programs (Table 80).

Table 80. The Effect of Existing Education and Training Programs in İzmir on Preparing Employees for Technological and Industrial Developments

Question: To what extent are the current education and training programs in your province effective in preparing workers for technological and industrial developments?		
Answers	**n**	**%**
Very Effective	1	1,6
Effective	18	28,1
Moderately Effective	32	50,0
Not Effective	7	10,9
Not Effective at All	6	9,4

The results suggest that universities and career centres in İzmir should play an important role in areas such as labor market statistic, career counselling, digital literacy training and sector partnerships. In addition, applied curricula and lifelong learning initiatives can also make important contributions (Table 81).

Table 81. The Role of Universities and Career Centers in People's Adaptation to New Technologies

Question: How important are the following roles of universities and career centers in your province in helping people adapt to new technologies in the job market?										
Options	**It doesn't matter at all**		**Not important**		**Moderately important**		**Important**		**Very important**	
	n	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Offer training programs in emerging technologies (e.g. artificial intelligence, blockchain, cyber security)*	-	-	1	1,6	28	43,8	24	37,5	11	17,2
Integrate hands-on, industry-oriented curricula to align with labor market demands.	-	-	3	4,7	19	29,7	32	50,0	10	15,6
Facilitate partnerships with industries for internships, apprenticeships and research opportunities	-	-	2	3,1	10	15,6	33	51,6	19	29,7
Provide career counseling to help students and job seekers understand evolving labor market trends	-	-	-	-	10	15,6	32	50,1	22	34,3

Table 81. The Role of Universities and Career Centers in People's Adaptation to New Technologies

Options	It doesn't matter at all		Not important		Moderately important		Important		Very important	
Promote lifelong learning and professional development through certificates and online courses	3	4,7	1	1,6	18	28,2	30	46,9	12	18,8
Creating specialized centers focused on innovation and entrepreneurship	-	-	6	9,4	25	39,0	22	34,4	11	17,2
Improving digital literacy and soft skills training (e.g. teamwork, problem solving	-	-	1	1,6	11	17,2	33	51,6	19	29,7
Conducting regular labor market analyses to identify skills and sectors in high demand	1	1,6	-	-	7	10,9	43	67,2	13	20,3

3.9 Recruitment Processes and Challenges

In order to understand the observations and views of the participants in İzmir on **"recruitment processes and challenges"**, asked them **"How often do you have difficulty finding candidates with the required technical skills?", "What do you think is the biggest challenge faced by organizations in your province during recruitment?", "In which areas do you think there is a skills gap among job applicants in your province?", "How do you perceive the impact of economic conditions in your province on the recruitment process?",** and **"How important do you see diversity and inclusion in improving organizational performance?"**. In the section on recruitment processes and challenges, it was observed that there were some gaps in the data and therefore a missing data analysis was conducted and the main analysis was conducted accordingly.

The results show that, according to the respondents, the majority of employers have occasional or frequent difficulties in finding candidates with technical skills. This indicates that the technical skills gap is an important problem in the labor market (Table 82).

Table 82. Degree of Difficulty in Reaching Individuals with Technical Skills

Question: How often do you have difficulty finding candidates with the required technical skills?		
Options	**n**	**%**
We Have no Difficulty	1	1,5
We are Rarely Challenged	8	12,5
Sometimes we Struggle	26	40,7
We Often Struggle	28	43,8
We Always Struggle	1	1,5

Respondents indicated that the biggest recruitment challenge faced by organizations in İzmir is the lack of qualified candidates (43.7%). This is followed by high competition for qualified employees (32.9%). These results show that the problem of finding qualified candidates is the most important challenge in the labor market. It is also understood that competition for qualified employees is also a significant obstacle (Table 83).

Table 83. Difficulties Encountered During Recruitment

Question: What do you think is the biggest challenge faced by organizations in your province during recruitment?		
Options	**n**	**%**
[1] Recruitment Processes	15	23,4
[2] High Competition for Skilled Workers	21	32,9
[3] Lack of Qualified Candidates	28	43,7

Respondents perceived that job applicants in İzmir lack technical skills, digital skills and communication skills the most. There is also a significant gap in problem solving and critical thinking skills (Table 84).

Table 84. Skill Gaps Among Job Applicants

Question: In which areas do you think there are the most common skills gaps among job applicants in your province?	
Options	**Number of Marks**
Technical Skills and Critical Thinking	29
Communication Skills	25
Leadership or Management Skills	12
Problem Solving and Critical Thinking	24
Customer Service Skills	11
Digital or IT-Related Skills	28
Notes = Participants selected more than 1 option.	

The majority of respondents think that economic conditions have a significant impact on the recruitment process (Table 85). The vast majority indicated that economic conditions have a moderate or greater impact on the recruitment process.

Table 85. The Effect of Economic Conditions on Recruitment Process

Question: How do you perceive the impact of economic conditions in your province on the recruitment process?		
Options	**n**	**%**
Completely Affecting	12	18,8
It has a Major Impact	29	45,3
Moderate Impact	20	31,3
Little Effect	1	1,6
No Effect at All	2	3,1

In İzmir, 46.9% of respondents rated diversity and inclusion as moderately important, 28.1% rated it as important and 20.3% rated it as very important in improving organizational performance (Table 86). On the other hand, 3.1% said it was not important at all and 1.6% said it was less important. These results indicate that diversity and inclusion is seen as an important factor in improving organizational performance.

Table 86. Diversity and Inclusion in Improving Organizational Performance

Question: How important do you see diversity and inclusion in improving organizational performance?		
Options	**n**	**%**
It doesn't matter at All	2	3,1
Less Important	1	1,6
Moderately Important	30	46,9
Important	18	28,1
Very Important	13	20,3

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3.10 Highlights of the Survey Analysis

1. Labor Market Analysis

In the labor market in İzmir, respondents indicated that economic difficulties have reduced job opportunities but increased demand for skilled labor in some sectors. The main reasons for the decrease in employment are the decline in market demand, technological automation and lack of vocational training.

2. Labor Demand and Qualified Personnel Shortage

While regional economic growth, incentives and technological integration stand out among the factors that most affect labor demand in İzmir, agriculture, manufacturing and education sectors face the highest shortage of qualified labor supply.

3. Employment of Migrant Workers and People with Disabilities

The perception of the employment of migrant workers is mostly neutral, with the most influential factor being low cost and ease of filling positions quickly. The impact of employees with disabilities is generally perceived as neutral, but they are considered to contribute positively, especially to teamwork.

4. Female Labor Force

Women are characterized by communication and adaptability skills, while technical areas need improvement. Barriers to representation stem from cultural expectations and male-dominated sectors; flexible working and equal recruitment are prioritized for support.

5. Technological Change and Effects on Labor Force

Respondents believe that technological changes will have a neutral to positive impact on İzmir's workforce. The areas that will be most in demand are artificial intelligence, software and digital skills.

6. Sectoral and Regional Labor Dynamics

Participants see government incentives, infrastructure investments and migration trends as the determining factors in the development of sectors in İzmir. Agriculture, manufacturing and vocationaltechnical activities have the highest labor demand and skills gaps, and these sectors are expected to be most affected by technological developments.

7. Linkages between Education and Employment

Participants noted that training programs in İzmir have limited effectiveness in adapting to technological and industrial developments and emphasized the need for improvement. Universities and career centers are expected to play a critical role in practical training, industry collaborations and digital skills development.

8. Recruitment Processes and Challenges

Participants noted that there are often recruitment challenges in İzmir due to a lack of qualified candidates and technical and digital skills shortages. It was emphasized that economic conditions greatly affect the recruitment process and that diversity and inclusion are important for organizational performance.

CHAPTER IV

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CHAPTER IV

4. QUALITATIVE ANALYSIS OF LABOR MARKET, ECONOMIC STRUCTURE AND MIGRATION DYNAMICS IN İZMİR

This section first provides an overview of the procedures followed during the qualitative data collection phase of the fieldwork conducted on January 22-24, 2025, the stakeholders interviewed and the research team for the İzmir Socio-Economic Sector Current Situation Report.

4.1 Methodology of Qualitative Interviews

During the three-day İzmir fieldwork on January 22-24, 2025, semi-structured interviews were conducted with focal people in the institutions as a qualitative data collection tool. These interviews were recorded with the consent of the participants through voice recorders and consent documents were signed by the participants. Between 1 and 12 focal people from the interviewed institutions participated in semi-structured interviews. Interviews were conducted with a total of 64 participants from stakeholder organizations. Interviews lasted between 65 to 90 minutes. At the end of the interviews, audio transcriptions were made and analyzed using MAXQDA qualitative data analysis software.

BThis section analyzes the data obtained from semi-structured interviews with 64 key informants from 9 stakeholder institutions. The thematic headings that emerged from the analysis are as follows:

- General Sectoral Situation: Potential capacity and opportunities in terms of employment,
- Sectors with Labor Shortages,
- Labor Force Qualifications and Supply-Demand Matching,
- Women’s Participation in the Labor Market: Opportunities and Constraints,
- Employers’ Attitudes towards Migrant Labor and Market Dynamics,
- Barriers to Migrants’ Transition to the Formal Labor Market,
- The Effects of Their Possible Return on the Labor Market,
- Inter-Institutional Communication Network in Transition to the Labor Market

In the following sections, which are organized according to these thematic headings, the different sub-components of each theme are examined in detail in line with the views expressed by the participants.

4.2 General Sectoral Situation: Potential Capacity in terms of Employment and Opportunities

İzmir stands out as one of Türkiye's most dynamic economic centers with employment opportunities in various sectors such as industry, logistics, renewable energy, agriculture and textiles. Thanks to its strong industrial infrastructure and strategic location, the city is integrated into global markets in trade and production, while increasing its international competitiveness through investments in the logistics sector. Wind and solar energy investments are making İzmir one of the leading cities in the green economy, while the agriculture and food industry sector is diversifying employment opportunities by maintaining the region's traditional production capacity. However, meeting the need for a skilled workforce, aligning vocational training with sector needs, and sustainability of infrastructure investments are crucial to this growth. While İzmir's future economic development will be shaped by an increase in industry and technology-oriented investments, comprehensive policies need to be developed to ensure that the labor market adapts to this transformation.

As one of the three largest cities in Türkiye, İzmir is an important economic hub with its diverse sectors such as agriculture, industry, services and technology. The city has a strong industrial infrastructure and has great potential in trade, transportation and logistics thanks to its strategic geographical location. In this section, İzmir's sectoral structure, economic capacity, employment opportunities and current opportunities will be discussed.

İzmir's industrial sector plays an important role in the city's economic structure. Industrial development has accelerated with the expansion of OIZs and industrial infrastructure. Industrial zones in the city have enabled growth in areas such as food processing, chemicals, automotive, electronics and textiles. The growth in these sectors has led to increased demand for industrial labor and new employment opportunities. In addition, as industry expands, improvements in logistics and production infrastructure are making İzmir more competitive in international markets.

Textile, one of İzmir's most prominent sectors, has been of great importance both historically and today. The city has the distinction of being one of Türkiye's leading centers for the production of ready-to-wear clothing, apparel and textile products. The textile sector in İzmir makes a major contribution to the economy with its production for domestic and global markets. Production in this sector is exported to many regions, especially Europe and the Middle East.

İzmir has a significant development in the renewable energy sector and has a great potential in renewable energy sources such as wind energy and solar energy. İzmir is one of the leading cities in Türkiye in terms of wind energy production and is also notable for its use of solar energy. Investments in this sector provide significant economic and environmental benefits to the city. This sector also drives the labor market in İzmir towards a more skilled workforce, enabling the city to achieve its green economy goals.

İzmir's logistics and transportation sector has great potential thanks to the city's growing trade volume and geographical advantages. İzmir Port is the most important logistics hub in the city, making İzmir a logistics center. The expansion of the port and improvements to its logistics infrastructure are increasing İzmir's international trade capacity and helping it become an important actor in the global market. In addition, İzmir's rail and road networks allow for increased regional trade. These improvements in ports and transportation infrastructure are providing İzmir with new employment opportunities and contributing significantly to the city's labor market.

İzmir is one of the most important cities in Türkiye in terms of agriculture sector. The city has a large capacity especially in areas such as olive, grape, cotton and tobacco production. The agricultural sector is one of İzmir's strong economic building blocks from the past and is becoming more efficient with the application of modern agricultural methods. İzmir's agriculture sector also combines with the food processing industry to create significant employment opportunities. Innovative investments in agriculture are diversifying labor demand and bringing a more qualified workforce to the city. Investments in areas such as organic farming and greenhouse production offer İzmir significant economic opportunities.

As a result, İzmir's sectoral structure is diversified across industry, textiles, renewable energy, logistics, agriculture and social support. Each sector makes a significant contribution to İzmir's economic growth and increasing employment opportunities. With its strong industrial infrastructure and growing sectors, the city has great potential for future economic development.

4.3 Sectors with Labor Shortage

Despite its strong industrial infrastructure and wide range of sectors, İzmir faces a shortage of qualified labor in industry, services, trade and agriculture. In industrial sectors such as automotive, chemicals and textiles, the lack of technically skilled workers has a negative impact on production efficiency, while in tourism and logistics, the lack of employment continuity limits the growth of these sectors. In the agricultural sector, the shortage of seasonal workers disrupts production processes, while in the logistics sector, despite increasing demand, the lack of drivers and warehouse workers leads to disruptions in transportation services. These labor shortages can be addressed by strengthening vocational training and increasing sectoral competencies. İzmir's economic sustainability depends on strategic planning to ensure a balance between labor supply and demand and to adapt the workforce to new sectors.

This section evaluates the sectors and occupations with gaps in the labor market in **İzmir** and discusses the impact of these gaps on regional labor force dynamics. As one of the largest and most economically developed cities in Türkiye, **İzmir** offers significant employment opportunities in many sectors such as industry, services and agriculture. However, labor shortages in certain areas stand out as an important issue for the sustainability of both businesses and regional development.

Table 87. Sectors and Positions with Labor Shortages in İzmir

Sector	Labor Position Needed
Industry	Welding Master
Industry	Electricity Technician
Industry	Machine Assembler
Industry	CNC Operator
Industry	Production Line Specialist
Textile	Machine Operator
Textile	Quality Control Specialist
Service	Waiter
Service	Commissary
Service	Housekeeping Attendant
Trade and Logistics	Logistics Staff
Trade and Logistics	Chauffeur
Trade and Logistics	Warehouse Worker
Agriculture	Pruning Worker
Agriculture	Harvest Worker
Agriculture	Animal Care Specialist

In İzmir's industrial sector, especially in manufacturing and production, the shortage of qualified labor is an important problem. According to research, the need for labor in the industrial sector is increasing, especially in areas that require technological skills. Large industrial enterprises in İzmir operate in sectors such as automotive, chemistry, food processing and machinery production. However, these sectors do not have enough technical staff, and there are serious shortages in positions such as welding masters, electrical technicians and machine assemblers. These shortages negatively affect productivity in industrial production and constitute an obstacle to growth in the sector.

İzmir's textile sector is one of the areas where the labor shortage is most evident. This sector is of great economic importance both in the local market and on a global scale. In textile production, demand for unskilled labor is particularly high, but there are also significant shortages of skilled labor, such as machine operators and quality control specialists. Textile companies in İzmir have difficulty in finding qualified employees, especially in textile production. This can hinder the development of the sector and prevent the full utilization of production capacity.

İzmir also has labor shortages in the service sector. In particular in the tourism, hospitality and food sectors, although the demand for staff is high, the qualifications of the people working in these positions are often insufficient. Given İzmir's touristic appeal, there is a constant demand for waiters, waitresses, busboys and housekeepers in the hospitality and catering sectors. However, as labor supply in these sectors is often short-term and seasonal, there is a lack of continuity in employment. This leads to an insufficient number of personnel, especially during the tourism season.

İzmir also has significant labor shortages in the trade and logistics sectors. İzmir Port, as one of the city's largest trade points, has a significant impact on the logistics and transportation sectors. There is a labor shortage in this sector, especially in positions such as logistics staff, drivers and warehouse workers. Although there is a constant demand for drivers and logistics staff, the supply of labor cannot meet this demand. In İzmir, the shortage of drivers in service vehicles causes daily transportation services to be disrupted. More vocational training and guidance to qualified labor force is required to overcome the deficits in this sector.

In the agricultural sector, labor shortages are also a major problem in İzmir. İzmir's agricultural production is largely linked to fruit and vegetable production. In the agricultural sector, there is a high demand for seasonal labor, but there is also a need for skilled agricultural workers. Labor shortages in areas such as harvesting, pruning and animal care disrupt production processes. In this field, especially pruning workers' ability to apply cutting techniques correctly directly affects production efficiency. Moreover, although agricultural workers are offered high daily wages, demand for these positions remains low due to the difficulty and seasonal nature of the work.

In conclusion, İzmir's labor market has serious labor shortages in the industry, service, trade and agriculture sectors. To close these gaps, it is important to strengthen sectoral training and increase vocational qualifications. If İzmir takes these steps to balance the labor market and support sustainable growth, it can continue its economic development in a more efficient and sustainable manner.

4.4 Labor Force Qualifications and Supply-Demand Matching

In İzmir's labor market, despite the growth in the industrial, service, logistics and agricultural sectors, the mismatch between the supply of qualified labor and the demands of the sectors is deepening. This imbalance stems from factors such as the inability of the vocational training system to fully align with sectoral needs, limited labor mobility, and the seasonal employment structure in some sectors that prevents continuity. In the industrial sector, digitalization and automation demand a workforce with more technical skills, while the existing education infrastructure cannot adequately meet this need. While the demand for employment in the service and logistics sectors is increasing, there are productivity problems due to the lack of qualifications in the labor supply. In order to support İzmir's sustainable economic growth, these labor market matching issues need to be addressed, vocational training programs need to be strengthened, and sector-based employment policies need to be developed.

Although İzmir has achieved significant economic growth in the industrial, commercial, service and agricultural sectors, there are serious matching problems in the labor market. In particular, the imbalance between the demand for skilled labor and the supply of available labor hinders the city's sectoral growth. This section examines in detail the labor force qualifications in İzmir and their impact on supply-demand matching.

> **Despite its economic growth, İzmir faces a mismatch between labor market qualifications and demand; a structural transformation in education and employment policies is essential to sustain sectoral development.**

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Figure 4. Findings and Recommendations on Labor Force Qualifications and Supply-Demand Matching in İzmir

Findings

- There is a shortage of qualified personnel in the industry and technology sectors (such as CNC operators, technicians, production line specialists).
- In the service sector (tourism, health, retail), the educated workforce is insufficient, seasonal workforce continuity cannot be ensured.
- In the logistics sector, there is a shortage of qualified personnel in warehouse management, driver and shipping areas.
- In the agricultural sector, there is a shortage of seasonal workers and a problem with adapting to modern agricultural techniques.
- Vocational training institutions do not meet the needs of the sector, and the lack of digital skills slows down industrial transformation.

Suggestions

- Vocational training programs for the industry and technology sectors should be increased, and university-industry collaborations should be strengthened.
- Professional development and language training should be expanded to train a qualified workforce in the service and tourism sectors.
- Special training and certification programs should be created in the logistics sector in the areas of warehouse management and driving.
- Workforce incentives in agriculture should be increased, and training on modern agricultural techniques should be organized.
- The curriculum of vocational high schools and technical schools should be updated according to sector demands, and digital skills training should be expanded.

The need for skilled workers in the labor market in İzmir is particularly evident in the industrial and technology sectors. The industrial sector is creating positions that require more technical skills due to developing technology and growing production capacity. However, the shortage of qualified personnel in these sectors in İzmir is slowing down the pace of industrial development. Especially in sectors such as automotive, machinery and textiles, the highly technical workforce cannot be adequately trained due to the shortcomings of the city's education system. For example, critical positions such as CNC operators, technicians working with machines and specialists to work on production lines cannot be filled with candidates with the required qualifications. This reduces production efficiency and increases labor costs.

Matching problems in the service sector also play an important role in the labor market in İzmir. Demand for labor is high in the city's fast-growing service sectors such as tourism, health and retail. However, productivity in these sectors is affected by the often inadequate qualifications of people working in positions such as customer service, tourism guidance and sales. In order to meet the demand for labor in these sectors, more vocational training and programs that provide sectoral competencies need to be implemented. In areas subject to seasonal fluctuations, such as the tourism sector in İzmir, the continuity of trained and experienced labor force cannot be ensured. Therefore, continuous training of the workforce in the service sector is of great importance to meet sectoral demands.

Similarly, there are mismatches between labor supply and demand in the trade and logistics sectors. The large capacity of İzmir Port and the strengthening of the city's logistics infrastructure increase the need for labor in this area. In the logistics sector, the need for qualified personnel is increasing, especially in warehouse management, transportation and dispatch. However, the difficulties in obtaining qualified labor in this field disrupt the balance in the labor market and prevent the sector from working more efficiently. Logistics firms in the city are particularly struggling to recruit experienced drivers, warehouse managers and planners. Therefore, more technical training and management skills development programs should be created for the logistics sector.

The agriculture sector is another important sector in İzmir. The agricultural workforce is constantly changing due to seasonal and physical challenges. However, most of the labor force working in the agricultural sector in İzmir is not in constant demand due to the hardships of the work and low wages. The implementation of organic farming and modern agricultural techniques has further increased the need for labor in the sector. The labor shortage in this area is due to a lack of skilled labor and the inability to address this shortage affects the efficiency of agricultural production. For the sustainability of the agricultural sector in İzmir, there is a need to increase training for agricultural workers and improve labor conditions. In addition, attracting and training young people to the sector is crucial to ensure the sustainability of the agricultural workforce.

One of the main reasons for this mismatch between labor supply and demand in İzmir is the deficiencies in vocational education. Failure to improve the quality of schools that train labor, especially in technical fields, increases the shortage of qualified labor. Vocational high schools and technical schools in İzmir are unable to provide education in line with sectoral demands. This leads to a lack of opportunities for young labor force to work in specific sectors. In addition, in order to direct young people to more qualified positions in the labor market, training programs need to be updated and shaped according to sectoral demands.

In conclusion, the imbalance between supply and demand in İzmir's labor market is a factor hindering the city's economic growth. Strengthening vocational training programs and developing sector-specific training systems are of great importance to solve labor matching problems in the industry, service, logistics and agriculture sectors. By achieving a more efficient balance in the labor market, İzmir can achieve sustainable economic growth. In addition, sectoral transformation and increased investments are recommended to address the labor shortage in İzmir. Particularly in the industrial sectors, the adoption of production processes based on new technologies will demand less labor, while educated labor is needed to ensure a healthy transition. Some studies in İzmir suggest that industrial investments should be increased and the labor market should be made more efficient to address the labor shortage.

4.5 Women's Labor Market Participation: Opportunities and Constraints

While women's participation in the labor market in İzmir presents a great opportunity for economic development, it faces various barriers due to social norms, inflexible working conditions and sectoral constraints. While entrepreneurship incentives that encourage women to enter the workforce and increased job opportunities in some sectors have expanded opportunities, low wages, insecurity and lack of vocational training are the main factors limiting women's employment. Women occupy lower positions and wage levels, particularly in the industrial and service sectors, deepening gender inequality in the labor market. Programs promoting women's entrepreneurship and increasing vocational training opportunities are among the critical elements to strengthen women's economic independence. In order to sustainably increase women's employment, it is crucial to improve public and private sector cooperation and implement policies to ensure equal opportunities in the workplace.

While İzmir has experienced significant economic growth and industrial development, women's participation in the labor market still faces significant barriers. Women's participation in the labor force presents a great opportunity for economic development, but in many sectors in İzmir there are social, cultural and economic constraints that prevent women from participating in the labor force. This section will discuss the opportunities and constraints affecting women's labor force participation in İzmir.

One of the key factors limiting women's labor force participation in İzmir is traditional gender roles. Women's responsibility for care work at home is one of the main barriers to labor force participation. Responsibilities such as childcare and housework affect women's preferences for working hours and types of work, leading women to seek more flexible and home-friendly jobs. Women who earn income by working at home are more likely to prefer such jobs as they can easily manage childcare.

However, an important opportunity for women's labor force participation is the increasing rate of women's entrepreneurship. İzmir is home to many programs that encourage women's entrepreneurship. By starting their own businesses, women are gaining economic independence and participating more in the labor force. This increase allows women to have a stronger presence in the labor market. However, financial and social barriers faced by women entrepreneurs can limit these opportunities.

In some sectors in İzmir, women work in lower paid and precarious jobs due to traditional gender discrimination. The sectors where women are most concentrated include textiles, the service sector and small-scale workplaces. These sectors generally have a higher demand for women's labor, but are also characterized by low wages and precariousness. When large firms in İzmir hire women, they often have to settle for lower wages and lower-level positions. However, some large enterprises encourage women's participation in the workforce through positive discrimination.

Another constraint affecting women's labor force participation is inequality in education. Women in İzmir have lower levels of vocational education and higher education than men. The low number of female students in vocational high schools and technical schools limits the number of women who are directed to qualified labor in the labor market. As a result, women are often directed to unskilled labor and work in positions that are incompatible with sectoral demands. Vocational training for women in İzmir will pave the way for more women entrepreneurs and a qualified workforce.

Gender inequality in the workplace is another factor that negatively affects women's labor force participation. In some workplaces in İzmir, especially in large industrial and service sectors, women do not hold equal positions with men. Women are paid less and occupy lower positions. In addition, women are less likely to work in jobs that require physical strength. Some large industrial enterprises in İzmir emphasize the need for more opportunities for the female workforce. However, this still creates constraints for women in certain sectors.

In conclusion, there are opportunities and constraints to increase women's labor force participation in İzmir. Equal opportunities in entrepreneurship, education and the labor market need to be created for women to gain economic independence. Women's labor force participation can be further increased through public and private sector cooperation in İzmir.

4.6 Employers' Attitudes towards Migrant Workforce and Market Dynamics

Migrant labor plays an important role in İzmir, especially in the agriculture, textile and construction sectors, but employers' attitudes towards this labor force differ according to sectoral needs and business scale. While small-scale enterprises employ migrant labor more due to low wages and the advantage of flexibility, large industrial enterprises are cautious towards this labor force due to lack of skilled labor and cultural barriers. The growing population of migrants and their increasing presence in the labor market may have an impact on economic and social balances in the long run. While the need for migrant labor in the agriculture and construction sectors indicates that they play a critical role in economic sustainability, the prevalence of informal employment leads to irregularities in the labor market and violations of labor rights. In order to achieve a more balanced labor market in İzmir, there is a need to increase vocational training and state support for migrants to be employed in more skilled positions.

This section assesses the role of migrant labor in different sectors of the labor market in İzmir and how employers' attitudes towards this labor force are shaped. In İzmir, migrant labor is particularly concentrated in sectors such as agriculture, textiles and construction, while employers' attitudes towards this labor force are shaped by economic needs and social attitudes.

Employers' attitudes towards migrant labor in İzmir vary largely according to the needs of the sectors and the scale of their enterprises. Small-scale enterprises, particularly in the textile and footwear sectors, are more likely to employ migrant labor, often in low-paid and temporary jobs. However, most large enterprises and corporate-level industrial organizations are more cautious about using migrant labor. Employers do not prefer migrant labor on the grounds that their education and qualifications are not sufficient. Some industrialists in İzmir refrain from hiring migrant labor, especially in line with sectoral needs. This is often related to nationalism, lack of qualifications and educational concerns.

However, migrants have a faster population growth rate compared to İzmir's population and this could lead to them playing a dominant role in the labor market in the medium to long term. This trend may result in a smaller share of the local workforce in employment. Moreover, the growing population of migrants also affects the demographic structure, leading to changes in social and economic balances.

In addition, in small-scale enterprises and informal labor markets, migrant labor is used more intensively. Particularly in the shoemaking and textile sectors, it is reported that SuTP/IPSHA constitute an important source of labor.

In these sectors, migrants generally work informally for low wages. Employers prefer migrant labor because of its cheapness and flexibility. However, such practices can lead to irregularities in the labor market and violations of labor rights.

Government incentives and projects to increase the employment of migrant labor are influencing the attitudes of employers in İzmir towards migrant labor. However, many employers in İzmir remain reluctant to use these incentives. Most employers do not prefer to employ migrant labor, citing both cultural barriers and economic concerns as reasons for this. In addition, most employers believe that while employing migrants for low wages may benefit the sector in the short term, in the long term it will create a shortage of skilled labor.

The contribution of migrant labor to the economy in İzmir is also important in terms of sectoral diversity. In the agricultural sector, migrant labor plays an important role, especially in seasonal work, working on a daily wage basis. Migrant labor is intensively used in İzmir's agricultural production areas, especially in areas such as Torbalı and Çaybaşı. In these regions, labor shortages are met by migrant labor, and migrants are an important resource that ensures the continuity of agricultural production. Migrant labor also plays a major role in the construction sector. In the construction sector in İzmir, the cheap employment of workers with SuTP/IPSHA enables construction projects to be completed quickly, but this leads to an increase in unregistered work and problems with labor rights.

In conclusion, the attitudes of employers in İzmir towards migrant labor are shaped by sectoral needs and labor market dynamics. Small-scale enterprises often use migrant labor for low-paid and temporary work, while large enterprises are more cautious towards migrant labor. However, the contribution of migrant labor to the economic structure in İzmir is significant, especially in the agriculture and construction sectors. If attitudes towards migrant labor in İzmir's labor market become more balanced with sectoral needs and government support, this will allow migrants to be employed in more skilled positions. It should be noted that migrants have a faster population growth rate compared to the Turkish population. This may lead them to play a dominant role in the labor market in the medium and long term. This trend may lead to a smaller share of the local labor force in employment. Moreover, the growing population of migrants also affects the demographic structure, leading to changes in social and economic balances.

4.7 Barriers to Migrants' Transition to the Formal Labor Market

In İzmir, migrants' participation in the formal labor market remains limited due to various barriers such as language barriers, low levels of education, prevalence of informal employment and negative attitudes of employers. The majority of migrant workers work in low-skilled and temporary jobs, but informal employment leaves them without economic and social guarantees. The tendency of employers to employ migrants informally in order to avoid legal obligations makes it difficult to create permanent employment opportunities in the labor market. Moreover, the lack of social integration of migrants and cultural differences further complicate their transition to formal employment. In order to overcome these obstacles, it is necessary to expand language and vocational training programs, develop incentive mechanisms for employers and implement regulations to reduce unregistered employment.

While İzmir offers significant opportunities to increase the labor market participation of Syrians under Temporary Protection (SuTP) / International Protection Status Holders and Applicants (IPSHA), they face many obstacles in their transition to the formal labor market. These include cultural, linguistic and social barriers faced by migrants, while the prevalence of informal employment also complicates this transition. This section will focus on the factors that hinder the participation of Syrians under Temporary Protection in the formal labor market in İzmir.

> **Although İzmir offers opportunities for the migrant workforce, barriers such as language, cultural integration, and informal employment constitute the main obstacles to entering the formal labor market.**

Figure 5. Barriers to Migrants' Transition to the Formal Labor Market

Employers' Approach to Immigrant Workforce	Sectors with Concentrated Immigrant Workforce	Barriers to Migrants' Transition to the Formal Labor Market	Suggestions and Solutions
Small businesses (textiles, footwear, agriculture) employ migrant workers heavily in low-wage and temporary jobs. Large businesses are cautious about employing immigrants due to their lack of qualifications and education. Rapid population growth of immigrants may create competitive pressure on the local workforce.	Agriculture: Intensive use in seasonal work (in regions such as Torbalı, Çaybaşı). Construction: Employment as cheap labor, but informal work is common. Textile and Shoemaking: Labor rights violations are increasing due to unregistered employment.	Language barrier: Immigrants who do not speak Turkish have difficulty finding work. Low level of education: Prevents immigrants from reaching qualified positions. Economic imperatives: There is a high tendency towards informal work to provide quick income.	Language and vocational training programs should be increased and immigrants should be integrated into the workforce. Employers should be made aware and unregistered employment should be prevented. ISKUR and KOSGEB incentives should be increased, and insurance premium support should be given to companies employing migrant workers.

In İzmir, it is observed that migrants, especially SuTP/IPSHA, are often involved in the informal labor market. While informal work offers a more flexible solution for both migrant workers and employers, it also brings with it serious problems such as lack of protection of legal and economic rights. Migrant labor is often employed in low-paid and temporary jobs, preventing their transition to the formal labor market. Some employers in İzmir specifically prefer SuTP/IPSHA to take advantage of the low-paid labor force, which deepens inequalities in the labor market and makes it difficult for migrants to enter the permanent labor market in the long term.

Language barriers are one of the biggest obstacles to migrants' integration into the labor market. The majority of migrants with SuTP/IPSHA have low Turkish proficiency, making it difficult for them to be employed in the labor market. Many employers in İzmir are hesitant to hire migrants who do not speak Turkish, as the language barrier negatively affects workplace productivity and employee-employer communication. Some SuTP/IPSHA are able to find a job once they have Turkish proficiency, but this process is time-consuming and often requires additional training in order to participate in the labor market.

Another important barrier is the lower education level of migrants compared to the local labor force. Many migrants in İzmir, especially SuTP/IPSHA, are not able to participate in the skilled labor market due to their generally lower level of education. Low educational attainment is also associated with a lack of professional skills, making it difficult for them to gain a permanent foothold in the formal labor market. Employers in İzmir state that migrants often work in low-skilled jobs and therefore are not willing to hire them in positions requiring skilled labor.

Economic reasons are also among the factors hindering migrants' transition to the formal labor market. Many migrants turn to more flexible and temporary jobs in order to earn a quick income. The informality of such jobs makes it difficult for the labor market to demand a steady supply of formal labor. Some large firms in İzmir see migrant labor as cheaper labor, but at the same time employ them informally to avoid legal obligations. The prevalence of unregistered work prevents government incentives and support from being sufficiently effective.

Finally, difficulties with the social integration of SuTP/IPSHA also constitute a significant barrier. In İzmir, it is difficult for migrants to interact with locals and achieve social cohesion. In particular, some employers may display negative attitudes towards migrant workers, citing cultural differences and social prejudices. This situation makes it difficult for migrants to gain a permanent place in the formal labor market.

In order to overcome the barriers to migrants' transition to the formal labor market in İzmir, language training and vocational training programs need to be increased. It is also important to inform and incentivize employers to prevent the prevalence of unregistered work and to ensure that more migrants are in permanent labor positions. By taking steps in these areas, İzmir can create a more efficient structure for migrants to participate more effectively in the labor market. In addition, institutions such as ISKUR and KOSGEB can offer financial incentives to employers to integrate migrant labor into the formal labor market. In this context, insurance premium support can be provided to firms employing migrant labor. Such incentives will make the employment of migrants more attractive and accelerate their integration into the labor market.

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4.8 Economic and Labor Market Effects of Potential Repatriation

The potential return of the SuTP/IPSHA could lead to a significant shift in İzmir's labor market, particularly in the agriculture, construction and service sectors. While employers may try to fill the gap with local labor, the low demand for work in these areas may make it difficult to meet the labor demand. The loss of the low-cost advantage of migrant labor could increase labor costs, reshaping sectoral competition and requiring businesses to develop new employment policies. Moreover, a shrinking labor pool may increase the difficulty of finding qualified workers, especially with an aging population. Strengthening vocational training programs and reshaping employment policies are critical to minimize the economic impact of this process and support the labor market to adapt to this change.

This section examines the sectors in which migrant labor is concentrated in İzmir and how employers' attitudes towards this labor force are shaped. Migrant labor in İzmir is mainly concentrated in the agriculture, textile and construction sectors. The approach of employers to migrant labor differs in line with sectoral needs, the scale of enterprises and social dynamics.

Small and medium-sized enterprises in particular widely employ migrant labor due to the low cost advantage. In labor-intensive sectors such as textiles and footwear, migrant workers are often employed in low-paid and temporary positions. In the agricultural sector, migrant labor is often used to fill seasonal labor shortages. In the construction sector, migrant workers are utilized in positions that local labor does not prefer to work in due to the harsh physical conditions.

In contrast, large industrial organizations and corporate enterprises are more cautious about employing migrant labor. Among employers' reservations, the professional qualifications and education levels of migrant workers and uncertainties in ensuring long-term employment continuity stand out. Especially in sectors requiring technical knowledge and expertise, employers prefer local labor or avoid investing in additional training for migrant workers.

Some industrial enterprises in İzmir also cite nationalism, cultural adaptation concerns and concerns about work discipline as reasons for refraining from employing migrant workers. The complexity of bureaucratic processes related to work permits, especially for workers under temporary protection, also reinforces employers' distant approach towards this workforce.

As a result, although migrant labor plays an important role in certain sectors in İzmir, the approach of employers to this labor force varies depending on sectoral dynamics and the scale of enterprises. While small enterprises use migrant labor more intensively, large industrial enterprises are more hesitant to integrate migrant labor. This indicates that the role of migrant labor in the labor market is shaped by the intersection of economic demands and social dynamics.

4.9 Inter-Institutional Communication Network in Labor Market Transition

Cooperation between the public and private sectors, local governments and civil society organizations plays a critical role in the transition to the labor market in İzmir. In particular, strengthening the coordination between education institutions and the business world is important to provide the skills needed in the labor market. To this end, regular meetings should be held between vocational high schools, universities and vocational colleges and employers, and training programs should be updated according to sectoral demands. In addition, increasing on-the-job training programs and internship opportunities will increase the employability of both the local workforce and the migrant workforce. Employers should provide equal opportunities to create a fairer and more inclusive structure in the labor market and awareness raising efforts to prevent discrimination should be supported. Strengthening inter-institutional communication will contribute to İzmir's economic growth by ensuring the efficient functioning of the labor market.

The importance of inter-institutional cooperation in the transition to the labor market in İzmir plays a major role depending on the dynamics of the city's economic structure. In the process of labor market integration, especially the inclusion of migrant labor into the local labor market is becoming an issue that requires strong inter-institutional cooperation. According to studies conducted in İzmir, cooperation between the public and private sectors, local governments and non-governmental organizations is crucial to ensure effective integration in the labor market. Such collaborations can enable educational institutions to offer more targeted and effective training programs to meet the needs of the business world.

Closer collaboration should be established between educational institutions and employers in İzmir. Regular meetings should be held between vocational colleges, universities and vocational high schools and employers to address the mismatch between the skills needed by the industrial and service sectors in İzmir and existing education programs. In these meetings, the skills needed in the labor market should be identified and training curricula should be updated according to these demands. For example, in the event of an increase in the need for workforce in the textile sector in İzmir, more training programs on textile engineering and production processes could be launched by developing joint projects with employers in this sector.

In addition, on-the-job training programs and internship opportunities should be increased to encourage inter-institutional collaboration. Local authorities and ISKUR in İzmir could organize sector-specific internship and on-the-job training programs. Especially for the migrant workforce and young population, such programs would increase their chances of finding a job by providing professional experience. In addition, if these programs support more diversity in the labor market , they can increase the participation of migrants in the formal labor market.

All stakeholders in the labor market in İzmir - local governments, the private sector and civil society organizations - should come together on common platforms to identify sectoral needs and take steps accordingly. These platforms can reduce the supply-demand imbalance in the labor market by enabling regular reviews of sectoral demands. For example, labor shortages in the food production sector in İzmir could be identified through meetings with chambers of industry and employers' associations, and collaboration with workforce training institutions to address these shortages.

Inter-agency cooperation should include the development of equitable policies to ensure equal opportunities between the local and migrant workforce. Civil society organizations in İzmir should educate and raise awareness among employers to combat discrimination in the labor market. Employers should provide equal opportunities to the local workforce and migrant workforce to ensure a fairer distribution in the labor market. This will create a balanced diversity in the labor market and ensure a fairer working environment. By improving institutional cooperation in the labor market in İzmir, these recommendations can lead to more effective integration of the local and migrant workforce. Strengthening inter-institutional interaction will ensure the efficient functioning of the labor market and sustain economic growth.

CHAPTER V

CHAPTER V

5. CONCLUSION AND RECOMMENDATIONS

This study aims to comprehensively analyze İzmir's labor market and identify sectoral employment gaps, vocational training needs, factors that make it difficult to access the labor force and areas for policy development. Field surveys, interviews and questionnaires conducted within the scope of the study revealed the differences between the expectations of employers and job seekers, and the employment dynamics of the province were reviewed with secondary data obtained from institutions such as TURKSTAT, ISKUR and SSI. The main objective of the study is to reveal the imbalances in the labor market in İzmir, to identify which sectors have labor shortages and to develop concrete recommendations on how vocational training can be planned in the most efficient way. At the same time, it is aimed to ensure that the labor supply is directed in accordance with the needs of the sectors and thus minimize the loss of time and effort.

The findings are summarized systematically in Table 88. This table presents a summary framework that analyzes the reasons for the labor shortage in the sectors identified as a result of the analysis conducted in İzmir labor market, expected qualifications, gender preferences of employees, attitude towards vulnerable groups and formal employment.

As one of Türkiye's most important economic centers, İzmir has a strong economic infrastructure in various sectors such as industry, agriculture, services and logistics. Historically a port city, İzmir offers significant advantages in terms of trade and industry due to its strategic location. However, an analysis of the city's economic growth and labor market dynamics reveals a number of sectoral opportunities and challenges. In this study, İzmir's main economic sectors are assessed and analyzed in a cause-and-effect relationship and policy recommendations are presented.

İzmir's unemployment rate of 11.4% is above Türkiye's average of 9.4% (Table 14). This indicates that although labor supply in İzmir is high, the capacity to create employment is not sufficient. Although there are certain labor shortages in the industrial and service sectors, the failure to create suitable job opportunities causes the unemployment rate to remain high.

On the other hand, the employment rate in İzmir is 47.9%, slightly lower than the 48.3% rate in Türkiye. İzmir's labor force participation rate is 54.1%, slightly higher than Türkiye's 53.3% (Tables 15 and 16). These data show that the number of job seekers in İzmir is higher than Türkiye's average, but the capacity to create employment remains limited. In terms of open jobs, the total number of open jobs in İzmir is recorded as 144,163, the majority of which are in the private sector. While there are 143,648 vacancies in the private sector, this number is limited to 515 in the public sector (Table 17). This suggests that the public sector's capacity to create jobs in İzmir is quite limited and that the private sector has become a decisive actor in labor demand. On the other hand, despite the high unemployment rate in the city, job vacancies are relatively low, indicating that the existing labor force is not fully aligned with market needs. This situation suggests that there is a mismatch between vocational training and the demands of the sectors, that the skills of job seekers do not meet the needs of the sectors and that various structural problems persist in terms of employability. In addition, employers' difficulty in filling some positions may be due to factors such as high wage demands, working conditions and the tendency of the workforce to gravitate towards certain sectors. In this context, in order to address the supply-demand imbalance in İzmir's labor market, sector-based labor force matching needs to be better analyzed and vocational training programs need to be tailored to the needs of the market. As the private sector is the main actor in job creation, increasing incentives for businesses to better plan their human resources can contribute to higher vacancy rates and lower unemployment.

İzmir's industrial sector is one of Türkiye's largest manufacturing hubs and has a large economic volume, particularly through organized industrial zones and free zones. Chemicals, automotive, textiles and food processing are the main sectors shaping İzmir's industrial ecosystem. However, the shortage of skilled labor in the industrial sector poses a significant problem. In particular, there is a serious shortage of technical positions such as CNC operators, welding masters and electrical technicians. The main reasons for this shortage in the industrial sector are insufficient vocational training, weak links between industry and educational institutions, and lack of orientation of the young population to these fields. In this context, strengthening vocational education, increasing incentives for the industrial sector and orienting especially the young population towards technical skills are of utmost importance. Moreover, supporting vocational high schools and technical education programs through public-private sector cooperation will be effective in closing the labor shortage in the industry.

İzmir has one of the most productive agricultural areas in Türkiye, and products such as olives, grapes, tobacco and cotton are important for both the domestic market and exports. However, an aging workforce and difficulties in employing seasonal workers in the agricultural sector are factors limiting the sector's sustainable growth.

Lack of mechanization and digitalization in agriculture are other important factors that reduce production efficiency. To overcome these problems, digitalization and automation technologies in agricultural production should be encouraged. In addition, rural development projects should be developed and grants for agricultural production should be increased to attract young people to the agricultural sector.

The services sector is one of the biggest contributors to İzmir's economic growth. The tourism, retail and accommodation sectors in particular have a large share in the city's economic structure. However, there is a shortage of trained and qualified labor in the service sector. In the accommodation and restaurant sectors, there are serious employment gaps in areas such as waiters and housekeeping staff.

In order to increase the employment capacity of the service sector, it is recommended to expand vocational training courses, increase the qualifications of personnel working in tourism and develop certification systems in the labor market. In addition, flexible working models should be developed for employees working in tourism and service sectors to ensure continuity of employment.

İzmir is one of the most important logistics centers in Türkiye due to its geographical location. İzmir Port plays a strategic role in international trade as the third largest port in Türkiye. However, the lack of qualified human resources in the logistics sector increases the labor shortage, especially in warehouse management, logistics staff and driver positions. The main reason for employment gaps in the logistics sector is the lack of adequate vocational training in this field and the inability of employees to adapt to the demands of the sector.

Vocational high schools and university departments providing logistics education should be expanded in order to overcome the labor shortage in the field of logistics. In addition, vocational certification programs should be established for those working in the logistics sector and skill sets appropriate to the demands of the business world should be provided.

İzmir has become an important center for refugee and migrant populations due to the increasing migration wave in recent years. The integration of migrant labor into the formal economy is crucial for both economic growth and social cohesion. However, language barriers, legal restrictions and employers' reservations towards migrant labor pose significant obstacles for refugees to enter the labor market. Accordingly, language training programs, vocational training courses and micro-credit support should be provided to facilitate the integration of migrants into the labor market. In addition, incentives for businesses should be increased to encourage increased migrant employment.

On the other hand, migrants have a faster population growth rate compared to İzmir's population, which could lead to them playing a dominant role in the labor market in the medium and long term. This trend may lead to a smaller share of the native labor force in employment. Moreover, the growing population of migrants also affects the demographic structure, leading to shifts in social and economic balances. However, in the event of the return of the SuTP/IPSHA, it is expected that the native labor force will be more present in the labor market. This would allow for the loss of the flexibility provided by migrant labor, especially in low-paid and temporary jobs, and thus allow the domestic labor force to fill the gap. However, for this transition to take place in a healthy manner, training and support policies to improve the qualifications of the domestic workforce need to be strengthened.

Although female employment in İzmir (32.7%) is higher than the Turkish average (30.4%), women's labor force participation rate is still not at the desired level. The biggest obstacles to women's employment include care obligations, work-life balance and lack of flexible working models. In order to increase women's employment, it is recommended to expand daycare and care services, develop micro-finance programs to support women's entrepreneurship, and encourage remote working models. In addition, education policies should be reshaped to ensure that women are more involved in STEM (science, technology, engineering and mathematics) fields.

The youth unemployment rate in İzmir is above the Türkiye average. The biggest challenges faced by young people in entering the labor market include lack of experience, mismatch between education and the labor market and lack of demand for qualified labor. On-the-job training programs, internship requirements and career counseling services should be increased to encourage youth employment. In addition, supporting programs that encourage youth entrepreneurship will increase the economic contribution of İzmir's young population.

The fact that the majority of the 1,121 workplaces in İzmir that are obliged to employ disabled people belong to the private sector shows that employment of disabled people is provided by the private sector rather than the public sector. On the other hand, it is noteworthy that some workplaces support the employment of people with disabilities beyond legal obligations and 746 people with disabilities in İzmir are employed as over quota. This indicates that some enterprises view the employment of people with disabilities not only as a legal obligation but also as part of their corporate social responsibility framework.The widespread implementation of such practices can ensure more effective participation of disabled individuals in business life. In this context, policies such as tax reductions, state-supported salary contributions and physical arrangements for workplaces that encourage the employment of disabled individuals should be made more effective.

The main challenges in İzmir's labor market are the mismatch between the supply and demand for qualified labor, labor shortages in the industrial and service sectors, constraints on women's participation in the labor force, high youth unemployment, difficulties in migrant integration and the failure of vocational training to meet sector needs. In this context, various measures need to be taken to ensure the supply-demand balance in İzmir's labor market, to close the shortage of qualified personnel needed by sectors and to increase employment.

These are:

Vocational high schools and universities should create training curricula for the industrial sector in areas such as CNC operators, welders and electrical technicians, and "Workforce Matching Centers" should be established in OIZs to provide rapid matching for open job positions.

A "Tourism Vocational Academy" should be established to address the staff shortage in the tourism sector, vocational trainings should be organized specifically for the hotel and restaurant sector, and short-term courses for positions such as waiters, cooks and hotel managers should be launched.

"Labor Integration Workshops" should be opened to integrate migrants into formal employment, inspections should be increased to reduce unregistered employment and tax reductions should be implemented to encourage formal employment.

To combat youth unemployment, "Young Entrepreneur Grant Program" should be established, low-interest loan support should be provided to university graduates, and training programs should be launched in areas such as software, data analytics and artificial intelligence.

A "High Technology Production Zone" should be established in the İzmir Free Zone, a "Digital Transformation Fund" should be established to accelerate the digitalization of SMEs, and R&D investments should be encouraged.

The capacity of İzmir Port should be increased, the "İzmir Logistics Base Project" should be realized to expand the volume of international trade, and state support for domestic technology production should be increased.

Special tax incentives should be applied to renewable energy investments, environmentally friendly production techniques should be made compulsory in industrial zones and incentives should be provided to enterprises that reduce carbon emissions.

In order to increase women's participation in the workforce, free daycare support should be provided, parental leave practices should be encouraged and a "Women's Cooperatives Support Program" should be established to support women's entrepreneurship.

In order for İzmir to sustain its economic growth, sector-based labor force matching needs to be improved, vocational training needs to be strengthened, and more effective participation of social groups in the labor market needs to be ensured. In this context, making labor policies more inclusive will increase İzmir's economic sustainability and competitiveness.

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Table 88. Sectors in Need of Labor Force and Required Labor Force Characteristics

Sector	Labor Shortage	Causes of Labor Shortage	Expected Qualifications	Gender Preference	Attitudes Towards Vulnerable Groups	Attitudes Towards Formal Employment
Automotive	1. CNC Operators 2. Electricity Technicians 3. Assembly Workers 4. Engine Mechanics	• Lack of adaptation to technological developments • Inadequate vocational training • Lack of technical labor force in the automotive supply industry and metal processing sectors • Lack of specialized labor force in industrial production	• CNC operator • Electrical & mechanical knowledge, robotic assembly competence • Mastery of automation systems	Male	• Neutral towards women, somewhat negative towards migrants	• Large-scale automotive firms encourage formal employment, but informality is widespread in SMEs due to lack of vocational training.
Textile	1. Production Elements 2. Quality Control Specialists 3. Unskilled Labor Force	• Low wages • Harsh working conditions • Youth apathy • Lack of qualified personnel in positions requiring technical skills • Migrant labor force is mostly employed in unskilled and low-paid jobs and cannot meet the need for qualified labor force	• Machine use • Fast production capability • Knowledge of quality control processes	Female	• Positive towards women, widespread employment for migrants	• Although large textile factories support formal employment, informal employment is still widespread in small workshop-type enterprises.
Tailoring & Apparel	1. Machinist 2. Mold Maker 3. Hand embroiderers 4. Modelist 5. Sewing Operator 6. Designer	• Lack of vocational training • Youth apathy • Lack of fashion design education • High costs	• Machine use • Mold knowledge • Hand craftsmanship • Fashion design talent	Female	• Positive towards women, limited employment for migrants	• Although large-scale fashion and apparel companies encourage formal work, informality is still a serious problem in small workshops.

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Agriculture	1. Seasonal Workers 2. Organic Agriculture Experts 3. Pruning Workers 4. Greenhouse Staff 5. Animal Care Specialist	• Lack of permanent employment due to seasonal work • Low wages • Low demand due to heavy physical conditions • Lack of youth orientation to the agricultural sector and aging agricultural labor force • Lack of training and certification in the agriculture sector • Low demand for local labor due to dependence on migrant labor	• Physical Resilience • Knowledge of modern agricultural techniques (drip irrigation, organic fertilization) • Ability to use tractors and other agricultural machinery • Pruning and grafting techniques • Experience in animal care and husbandry	Male	• Neutral towards women, positive towards migrants	• Unregistered work is widespread among seasonal agricultural workers, and social security is not provided especially for workers with SuTP/IPSHA.
Service	1. Waiter 2. Komi 3. Housekeeper 4. Kitchen Staff 5. Retail Workers 6. Sales Staff 7. Tourism Guides	• Low wages • Lack of vocational training • Shift system is not attractive for employees • Failure to ensure labor force continuity due to seasonal employment fluctuations • Matching problems between labor supply and sector needs • Low demand as some jobs in the service sector are low-paid and high-paced	• Effective communication with the customer • Fast order management • Adaptation to teamwork • Adaptability to intensive tempo and shift work • Compliance with hygiene and food safety rules	Female/ Male	• Positive towards women, neutral towards migrants	• Large hotels provide formal employment, but informality is high among seasonal workers.

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Sector	Labor Shortage	Causes of Labor Shortage	Expected Qualifications	Gender Preference	Attitudes Towards Vulnerable Groups	Attitudes Towards Formal Employment
Logistics & Trade	1. Warehouse Managers 2. Logistics Elements 3. Chauffeur 4. Transport Operators	• Intensive working hours • Low wages • Lack of vocational training • The problem of adapting to the digitalization process in the logistics sector • Shortage of employees with foreign language skills	• Knowledge of international trade legislation • Organization skills • Physical endurance • Forklift operator • Warehouse management systems • Logistics optimization techniques	Male	• Negative towards women, neutral towards migrants	• Large firms encourage formal employment, but the tendency to work informally in the transportation sector is moderate.
Energy	1. Renewable Energy Experts 2. Carbon Footprint & Energy Efficiency Experts 3. Environmental Engineers	• The need for green transformation • Lack of qualified personnel • Lack of knowledge on energy management and carbon emission reduction strategies	• Energy Management • Environmental Engineering Knowledge • Green Energy Technologies, • Knowledge of carbon emission reduction strategies	Male	• Neutral towards women, negative towards migrants	• With government incentives, formal employment in the renewable energy sector is widespread, but small-scale enterprises are not fully secured.

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Health	1. Nurse, Elderly and Patient Caregivers 2. Technical Health Personnel	• Aging population • Intense work schedule • Lack of specialized personnel,	• Health sciences education • Patient care experience • Patience and empathy	Female	• Positive towards women, partly positive towards migrants	• Unregistered work in the health sector is almost non-existent, and large hospitals and public health institutions require registered employment.
Information & Technology	1. Software developer 2. Data Analyst, 3. Cyber security expert 4. Game developer	• Speed of digital transformation • Insufficient digital trainings • Brain drain	• Cloud computing, artificial intelligence, Data Analytics, Game Development	Male	• Neutral towards women, moderately negative towards migrants	• Technoparks and R&D centers require registered work, but informality among freelance software developers and remote workers is occasionally observed.

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