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SUPPORT FOR TRANSITION TO LABOR MARKET PROJECT

PROVINCE-BASED SOCIO-ECONOMIC SECTOR CURRENT SITUATION REPORT

BURSA

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

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(BURSA)

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ABBREVIATIONS

BAG-KUR	: Independent Employees Social Security Institution
GDP	: Gross Domestic Product
GHI	: General Health Insurance
IDPs	: Internally Displaced People
IPSHA	: International Protection Status Holders and Applicants
ISKUR	: Turkish Employment 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
SuTPs	: Syrians under Temporary Protection
TCS	: Temporary Contract Staff
TURKSTAT	: Turkish Statistical Institute

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INTRODUCTION

Bursa plays a critical role in the country's development as a city located in the Marmara Region of Türkiye, which stands out with its rich history, economy, industry and cultural heritage. With its deep historical heritage as the first capital of the Ottoman Empire, Bursa is also one of the locomotive cities of the Turkish economy with its strong industrial infrastructure, agricultural potential and export capacity. Thanks to its geographical proximity to Istanbul and European markets, advanced transportation networks and logistics advantages, Bursa has become a strategic center for national and international trade.

Bursa is one of Türkiye's largest industrial cities, with strong production capacity in the automotive, textile, machinery, food, chemical and furniture sectors. Known as the heart of Türkiye's automotive industry, the city hosts the country's largest automobile manufacturers and is a critical center for employment and exports. In addition, Bursa, which has a long history of silk production, is an important production and export center in the textile and garment sectors.

In addition to industry, Bursa also has significant potential in agriculture and tourism. As one of the cities with the most fertile agricultural lands in Türkiye, it has a wide range of agricultural production, especially olive, fruit and vegetable production. In addition, it continues to be a major center of attraction for both winter tourism and nature tourism with its natural beauties and touristic destinations such as Uludağ.

With its economic power, industrial infrastructure and commercial potential, Bursa has a remarkable structure in terms of employment dynamics and labor market. Continuously developing industrial sectors and migration mobility create significant changes in the city's labor supply and demand. The Bursa Socio-Economic Sector Current Situation Report, prepared in this context, presents a comprehensive assessment of the socio-economic structure of the province, the current situation analysis on the basis of sectors and the dynamics of the labor market. The report consists of five sections: the Literature Review, Secondary Data Analysis, Survey Analysis and Findings, Analysis and Findings of In-Depth Interviews and General Evaluation and Policy Recommendations.

The Literature Review, existing studies on Bursa were examined and prominent sectors were reviewed. From the perspective of employers, unemployment, migrant workers and vocational training in Bursa are discussed. Evaluations on sectoral employment dynamics, qualified, unqualified, young, female and seasonal labor demands are summarized.

In secondary data, population, labor force and employment, social security and working life, and migration data for Bursa are evaluated based mainly on data from TURKSTAT, ISKUR, SSI, Ministry of Labor and Presidency of Migration Management.

As part of the fieldwork, in addition to in-depth interviews conducted in Bursa, a survey was conducted with (60) stakeholders to reach a wider audience. The survey results are discussed in detail in the third section. Then, the findings of the in-depth interviews are presented in the fourth section. In the final section, in the light of all this information and findings, recommendations and strategies for the development of the labor market in Bursa are evaluated and policy recommendations for sustainable employment and social cohesion are presented.

The Bursa 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 and private sector representatives who want to increase integration into the labor market will have the opportunity to evaluate the prominent employment areas in Bursa, employer expectations and effective methods that can be followed in job placement processes through this report.

Accordingly, the report aims to provide a comprehensive source of information on the province's labor market for policymakers, business representatives and academia by presenting the current socio-economic dynamics of Bursa. It also aims to contribute to sustainable growth and development processes by providing strategic road maps for more effective utilization of regional economic potential.

> **“This report aims to serve as a comprehensive resource on Bursa's labor market by outlining the province's current socio-economic dynamics for policymakers, business representatives, and the academic community.”**

CHAPTER I

CHAPTER I

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

Bursa has a great historical significance as the first capital of the Ottoman Empire. Conquered in 1326 by the Ottomans, the city became prominent with its silk production and trade, and hosted the most important examples of early Ottoman architecture. Bursa, which became a major trade center during the Ottoman period, developed economically and culturally, especially with its location on the silk road. The city, which came to the forefront with industrial investments during the Republican period, continues to be one of the most important cities in Türkiye in the fields of industry, agriculture and trade.

From a demographic perspective, Bursa has a population of 3,214,571 by 2023, making it the fourth most populous province in Türkiye. The population density is 308 people per square kilometer and the urban population accounts for 85% of the total population. Bursa is one of the most immigrant cities in Türkiye and an important center for both internal and international migration. It is home to a SuTPs population of 162.928,as of February 27, 2025, especially considering the Syrian migrant population. With its large labor force potential, the city is among the provinces with high employment in the industrial sector.

Economically, Bursa is one of Türkiye's most powerful industrial cities. The automotive, textile and machinery industries have developed significantly in the city. Major automotive factories such as Tofaş and Oyak Renault, as well as numerous sub-industry companies, operate in Bursa. In terms of the textile sector, Bursa meets 75 percent of Türkiye's synthetic yarn production and is known as one of the country's largest textile production centers. In terms of the agricultural sector, the city is particularly prominent for its olive, chestnut and peach production.

In terms of foreign trade, Bursa exported 16 billion dollars as of 2023. The automotive sector has the largest share in the city's exports, followed by the textile and machinery industries. European Union countries are among Bursa's largest export markets, and the city also attracts many international investors. Bursa Organized Industrial Zone, one of the largest industrial zones in Türkiye, stands out as an important center in industrial production.

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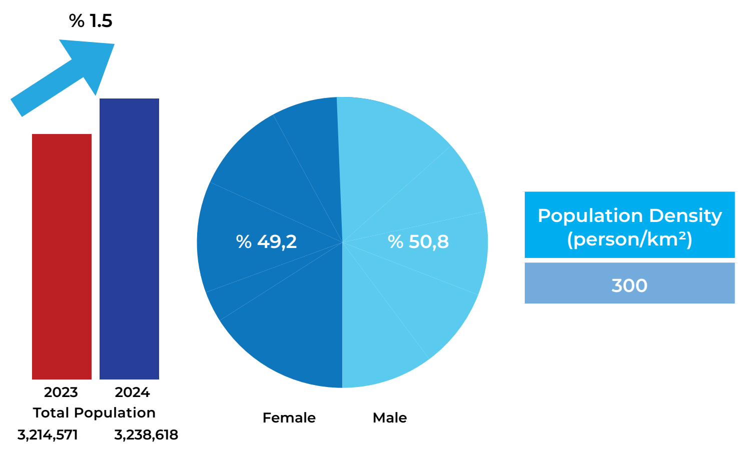
Looking at Bursa's position in the Turkish economy, the city is the fourth largest economy in the country. Bursa, which accounts for 5.86 percent of Türkiye's total exports, is also above the national average in terms of gross domestic product per capita. As of 2022, the gross domestic product per capita in Bursa is estimated at $11,591. The fact that Türkiye's first organized industrial zone was established in Bursa in 1963 shows that the city has played a pioneering role in industrial and economic development.

Table 1. Demographic Breakdown of Bursa by Variable

Category	Value
Total Population (2023)	3.214.571
Population Growth Rate (per thousand)	14,72
City Population (%)	%85
Rural Population (%)	%15
Young Population (0-14 Years)	%25
Employable Population (Age 15-64)	%67
Elderly Population (Age 65+)	%8
Female Population (%)	%50,2
Male Population (%)	%49,8
Labor Force Participation Rate (%)	%53,1
Unemployment Rate (%)	%9,8
Non-Farm Unemployment Rate (%)	%12,3
Literacy Rate (%)	%97,5
Average Household Size	3.4 people

Graphic 1. Demographic Breakdown of Bursa by Variable



1.1 Effects of Regional, Cultural and Economic Factors

Bursa has been home to many different civilizations throughout history and this has deeply affected the cultural structure of the city. As the first capital of the Ottoman Empire, Bursa stands out as a city rich in architectural structures, cultural heritage and traditions. At the same time, Bursa has a multicultural structure with traces of the Roman, Byzantine and Ottoman periods, which has a significant impact on the tourism sector. Historical inns, bazaars, mosques and mausoleums in the city attract great interest from domestic and foreign tourists, and as of 2023, there are more than 1,200 historical buildings in Bursa that are under protection within the scope of cultural heritage (Bursa Economic and Social Indicators, 2023).

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In economic terms, Bursa is one of Türkiye's largest industrial centers and makes significant contributions to the national economy, particularly in the automotive, textile and machinery industries. As of 2023, Bursa accounted for 5.86% of Türkiye's total exports and is the fourth largest province in Türkiye in terms of industrial production. Organized industrial zones and free zones in Bursa attract foreign direct investments and support economic growth (Bursa 2023 Economic and Social Indicators, 2023).

Bursa's demographic structure is also an important factor shaping regional economic development. As of 2023, the total population of the city is set at 3,214,571. Factories, especially in the automotive and textile sectors, have a production model based on the labor force from external migration, and the registered Syrian refugee population in Bursa is reported as 181,266 people (Bursa Karacabey Report, 2021).

Another factor contributing to Bursa's regional economic development is the agricultural sector. The city is Türkiye's largest olive producer and is also a major producer of chestnuts, peaches and tomatoes. The combination of the agricultural sector with industry has created a strong ecosystem for food processing and exports. By 2023, the share of agriculture in Bursa's total economy is estimated at 9.47% (Bursa 2023 Economic and Social Indicators, 2023).

Bursa's regional cultural structure and economic factors are among the most important determinants of the city's economic growth and social dynamics. Bursa's historical heritage and industrial strength shape regional development and the city has become a center of both national and international trade. Supporting these dynamics with sustainable development policies is critical for Bursa to maintain its economic growth in the long term.

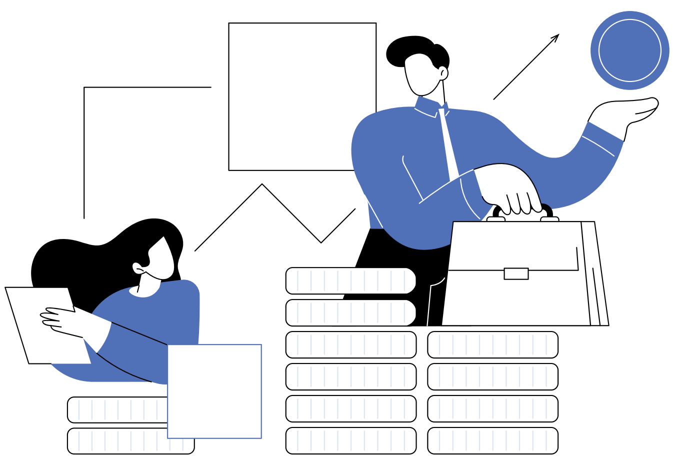

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Table 2. Bursa City Profile: Key Statistics

Indicators	Value	Share in Türkiye (%)	Ranking Across Türkiye
Province Area (km²)	10,813	1,39	27
Population (2021)	3,147	3,72	4
Population Growth Rate (per thousand) (2020/2021)	14,72		20
Population Density (people/km²) (2021)	302		6
Working Age Population (15-64 years) (2021)	2,172,296	3,78	4
Young Population (15-24 years) (2021)	428,251	3,30	4
Total Number of Active Insured (2021)	1,045,956	4,23	4
Number of Compulsory Insured (4/a) (2021)	766,768	4,74	4
Industry (05-35-09-33) Number of Compulsory Insured (4/a) (2021)	361,611	7,98	2
Gross Domestic Product (GDP) at Current Prices (Thousand TL) (2021)	302,120,912	4,17	5
Industrial GDP at Current Prices (BCDE) (Thousand TL) (2021)	133,261,550	7,06	4
Manufacturing GDP at Current Prices (C) (Thousand TL) (2021)	125,694,280	7,81	4
GDP per Capita (USD) (2021)	10,765		9
Exports (Thousand USD) (2021)	11,647,717	5,17	4
Imports (Thousand USD) (2021)	8,534,858	3,14	5
Foreign Trade Balance (Thousand USD) (2021)	3,112,859		2
Ratio of Exports to Imports (%) (2021)	136,47		48
Total Deposits (Million TL) (2021)	129,822	2,64	5
Total Loans (Million TL) (2021)	120,400	2,74	5
Loans/Deposits (%) (2021)	92,74		47
Number of Incentive Certificates (Number) (2021)	818	6,42	2
Incentive Certificate Fixed Investment Amount (Million TL) (2021)	16,468	5,99	2

Source: TURKSTAT 2021 Report

Bursa stands out as one of Türkiye's largest industrial and commercial centers. As of 2021, its population is 3,147,818 people, constituting 3.72 percent of Türkiye's population and making it the fourth most populous province in Türkiye. The population density is 302 people per square kilometer, indicating that the city is one of the densely populated areas. The population growth rate was calculated as 14.72 per thousand, ranking twentieth in Türkiye. These indicators reveal that Bursa's population is growing steadily both as an industrialized city and as a city receiving migration.

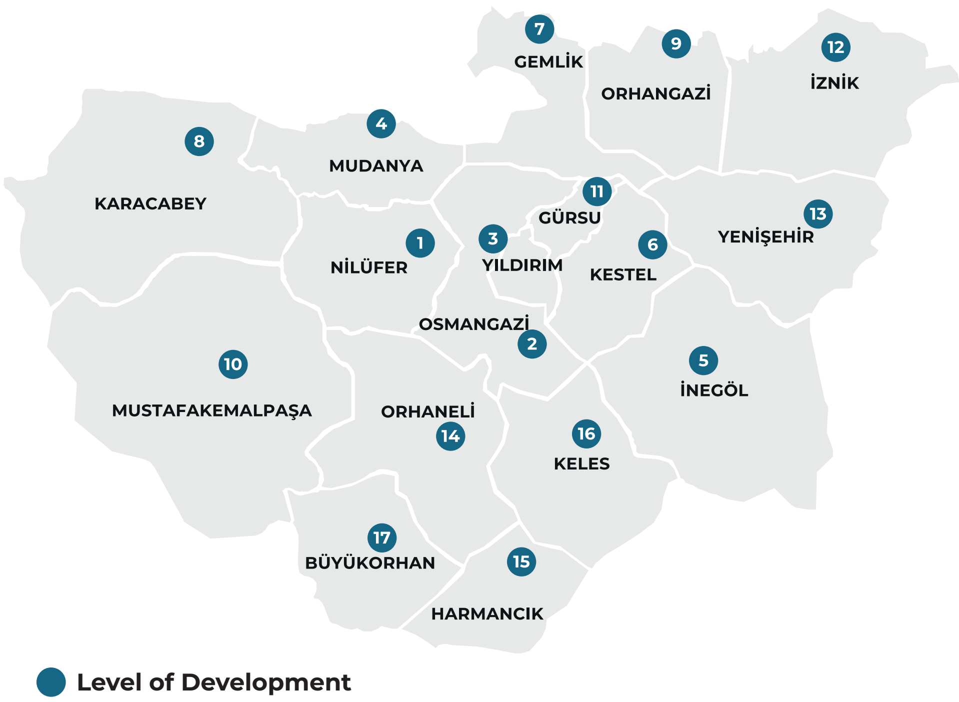
Looking at the economic statistic, Bursa's gross domestic product at current prices in 2021 is 302,120,912 thousand TL and its share in the Turkish economy is determined as 4.17 percent, ranking fifth in Türkiye in terms of GDP. Bursa's industrial production is quite strong and the share of industrial GDP in Türkiye ranks fourth with 7.06%. Bursa's GVA contribution in the manufacturing industry is TL 125,694,280 thousand, making it the fourth largest province in Türkiye in this area. Bursa's industrial sector is particularly concentrated in the automotive, textile and machinery industries.

In terms of employment, Bursa is the fourth largest city in Türkiye in terms of labor force with a working age population of 2,172,296. The number of compulsorily insured employees is 766,768 and ranks fourth in Türkiye. The number of compulsorily insured employees, especially in the industrial sector, is 361,611 and Bursa ranks second in Türkiye in this field. These statistics show that Bursa is one of the most important provinces in Türkiye in terms of industrial production and employment capacity.

According to foreign trade data, Bursa's exports in 2021 were recorded as 11.6 billion dollars and imports as 8.5 billion dollars, and the city had a foreign trade surplus of 3.1 billion dollars. The ratio of exports to imports is 136.47 percent, ranking Bursa forty-eighth in Türkiye, yet it has a strong foreign trade balance. Bursa's industrial production and foreign trade success is especially thanks to the automotive sector.

In terms of financial indicators, Bursa has total deposits of TL 129,822 million and total loans of TL 120,400 million, ranking fifth in Türkiye in both indicators. The loan-to-deposit ratio is 92.74%, ranking forty-seventh in Türkiye. This indicates that industrial and commercial activities in Bursa are largely credit-supported and that firms are active in accessing finance. Bursa stands out as one of Türkiye's most important economic centers with its industry and export-oriented economy, large workforce and strong financial structure. The city's industrial production and employment figures are above the Turkish average, and it has a strong position in foreign trade with an export surplus.

Figure 1. Bursa District Development Rankings



The socio-economic development ranking of Bursa's districts reveals the economic, social and infrastructural differences between the districts. According to 2022 data, Nilüfer is the most developed district among the districts of Bursa, while Büyükorhan is the district with the lowest level of development.

Nilüfer ranks 8th among 973 districts and is the most developed district in Bursa. With a score of 4,072, it ranks in the first development tier and shows that it is one of the most modern, industrial and commercialized districts of Bursa. Osmangazi ranks second in the province and has a high level of development, ranking 32nd in Türkiye. The development level of both districts is determined as one.

Third-ranked Yıldırım and the following districts of Mudanya, İnegöl, Kestel and Gemlik are included in the second level of development. Although these districts are important in terms of industry and trade, they have a lower socio-economic development level compared to Nilüfer and Osmangazi. In particular, although İnegöl is economically important with its strong furniture industry, it lags behind the first two districts in general socio-economic indicators.

Districts such as Mustafakemalpaşa, Gürsu, İznik and Yenişehir are located in the third development level and are among the predominantly rural districts of Bursa. These districts have a lower level of development due to their distance from industrial and commercial centers. Especially districts such as İznik and Yenişehir are characterized by agriculture and animal husbandry based economic activities.

Orhaneli, Harmancık, Keles and Büyükorhan are included in the fourth and fifth development levels. Büyükorhan is the least developed district of Bursa, ranking 815th in Türkiye. These districts have lagged behind socio-economically due to limited industrial investments and infrastructure projects, high migration rates and low economic diversity.

Table 3. Breakdown of Industrial Employment by Employee Type

Employee Type	Türkiye Number of Employees	Türkiye Share (%)	Bursa Number of Employees	Bursa Share (%)	Share in Türkiye (%)
Engineer	174,209	4,17	14,786	4,18	8,49
Technician	137,529	3,29	8,284	2,34	6,02
Other Technical Field	69,138	1,65	4,350	1,23	6,29
Master	270,432	6,47	19,088	5,39	7,06
Worker	2,846,464	68,13	258,492	72,99	9,08
Skilled Worker	14,187	0,34	301	0,08	2,12
Apprentice	19,517	0,47	622	0,18	3,19
Subcontracted Worker	143,418	3,43	4,778	1,35	3,33
BAG-KUR	55,968	1,34	4,889	1,38	8,74
Administrative Staff	447,203	10,7	38,535	10,88	8,62
Total	**4.178.065**	**100**	**354.125**	**100**	**8,48**

Source: TURKSTAT 2021 Report

Looking at the distribution of industrial employment in Bursa by employee type, a total of 354,125 people are employed in the industrial sector. Bursa accounts for 8.48% of industrial employment in Türkiye, indicating that it is an important center in the industrial sector. While the majority of employees are workers, qualified employees such as engineers, technicians and administrative staff also have a significant share in the sector.

Workers represent the largest group, accounting for 72.99% of Bursa's industrial employment. This rate is higher than the rate of 68.13% in Türkiye as a whole. This indicates that Bursa's industry has a labor-intensive structure and is largely production-based. Bursa is also home to 9.08% of the total workers in Türkiye.

Engineers have a share of 4.18% in Bursa's industrial employment with 14,786 people. The total number of engineers in Türkiye is 174,209 and Bursa accounts for 8.49% of this group. This data shows that Bursa's industry has a significant potential in high-technology based production. At the same time, the ratio of technicians and other technical personnel is calculated as 2.34% and 1.23%, respectively. Bursa has 6.02% of all technicians in Türkiye, indicating that the city's industrial infrastructure supports production processes that require technical expertise.

Craftsmen have a 5.39% share in Bursa's industrial employment, with 19,088 people working in this category. In Türkiye, there are 270,432 craftsmen and Bursa accounts for 7.06 percent of this group. The number of employees with less experience such as apprentices and journeymen is quite low. Bursa has 0.18% apprentices and 0.08% journeymen. Compared to Türkiye as a whole, Bursa has a lower share of apprentice and journeyman employment, which may indicate that a more experienced and educated workforce is preferred in the industrial sector.

Administrative staff play an important management and support role, accounting for 10.88% of Bursa's industrial employment. While 447,203 people work in administrative positions across Türkiye, Bursa accounts for 8.62% of this group. This data shows that Bursa's industrial sector is not only based on production, but also has a strong structure in management, logistics and support services.

Overall, Bursa has a significant share in industrial employment across Türkiye and has a predominantly working class industrial structure. However, the fact that engineers, technicians and administrative staff are also employed at certain rates shows that Bursa follows an industrial model based on both production and technical expertise. Increasing technology-based production by employing more qualified labor force in the industrial sector will be an important factor in increasing Bursa's national and international competitiveness.

1.1.1 Agriculture and Livestock Sector

The province of Bursa is one of Türkiye's major agricultural and livestock centers and stands out with its large agricultural lands and strong livestock potential. As of 2020, the per capita value of crop production in Bursa was determined as 2,465 TL. This value is below Türkiye's average of 2,942 TL. Crop production accounts for 66 percent of the value of agricultural production in Bursa.

Bursa has an important position in Türkiye, especially in fruit and vegetable production. As of 2022, 96.11 percent of Türkiye's raspberry production was realized in Bursa. Bursa also ranks first in Türkiye in blackberry, blueberry, pear and medlar production. Bursa also has a strong position in vegetable production, with 87.68 percent share in Brussels sprouts, 47.62 percent in pomegranate production and 35.03 percent in fresh peas.

Bursa's livestock sector is also highly developed. As of 2020, the province has 242,065 bovine animals, 579,525 ovine animals, 2,362,476 broiler chickens and 7,825,840 laying hens. Red meat production is calculated as 16,128 tons, poultry meat production as 64,037 tons and milk production as 299,557 tons. In addition, Bursa is an important production center in Türkiye with an egg production of 1,334,908,892 eggs (Bursa Governorship Provincial Directorate of Agriculture and Forestry, 2023).

Agricultural cooperatives and producer associations also play an important role in the development of the sector in Bursa. There are a total of 403 agricultural cooperatives in Bursa. Of these, 325 are agricultural development cooperatives, 58 are irrigation cooperatives and 20 are aquaculture cooperatives. In addition, organizations such as Bursa Region Livestock Cooperative Union, Bursa Region Forestry Cooperative Union and Bursa Region Agricultural Cooperative Union provide support to producers (Bursa Governorship Provincial Directorate of Agriculture and Forestry, 2023).

Aquaculture production in Bursa also occupies an important place. According to 2023 data, 1,207 tons of fish were produced through hunting in inland waters and 249.6 tons through aquaculture. Sea fishing is 12,116 tons. However, honey and beeswax production in Bursa is also noteworthy. The beekeeping sector is well developed with an annual production of 1,142 tons of honey and 38 tons of beeswax (Bursa Governorship Provincial Directorate of Agriculture and Forestry, 2023).

1.1.2 Industry and Manufacturing Sector

Bursa is one of the largest industrial and manufacturing centers in Türkiye, with a strong presence in sectors such as automotive, textile and machinery industries. The share of the industrial sector in Bursa's economy is quite high and industrial production in the city is becoming increasingly diversified. As of 2021, Bursa's industrial gross domestic product was 133,262 million TL, accounting for 44.11 percent of the province's total economic production. This ratio is above Türkiye's average and shows that Bursa is one of the most important centers of the country in terms of industrial production (TURKSTAT ,2022).

One of the sectors with the largest share in Bursa's industry is automotive. Automotive production in Bursa is not only limited to assembly processes, but also contributes greatly to the development of automotive sub-industry companies. A large portion of the total automotive production in Türkiye is realized in Bursa, and the automotive sector is one of the cornerstones of Bursa's economy.

The textile sector is also of strategic importance for Bursa. The city has historically been prominent in textile production and plays an important role in the textile industry today. Textile industry companies in Bursa produce for both the domestic market and exports. Looking at the sectoral distribution of industrial enterprises in Bursa, the construction sector has the largest share with 17.61%. The construction sector is followed by the service sector with 16.40%, which reflects the expansion of the service sector in Bursa with its developing urbanization and infrastructure projects. The textile sector ranked third with 14.71%, indicating that Bursa's traditionally strong textile industry retains its importance in the regional economy. The automotive sector ranked fourth with 9.35%, indicating that Bursa continues to be an important center of automotive production in Türkiye (Bursa Province Sector Report, 2021).

In terms of industrial employment, Bursa is one of the provinces with the highest industrial employment in Türkiye. As of 2021, a total of 354,125 people work in the industrial sector in Bursa, which corresponds to 8.48% of Türkiye's overall industrial employment (TURKSTAT, 2022). While the majority of industrial employees are workers, the proportion of qualified labor force such as engineers and technicians is also significant. Industrial employment in Bursa is largely based on traditional production processes and increasing the qualified labor force can increase the added value of the city's industrial production.

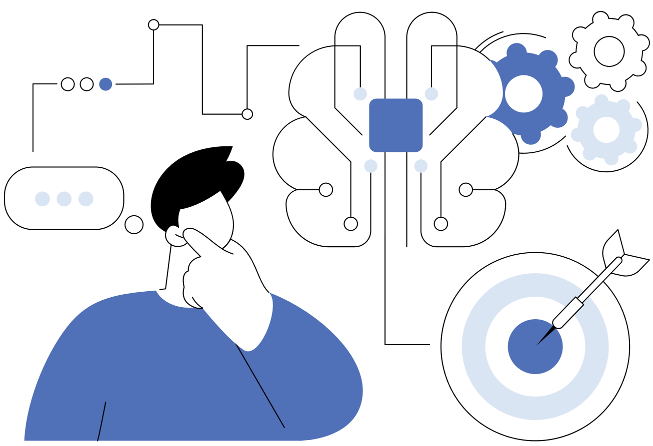
Bursa is one of the strongest cities in Türkiye in terms of industrial and manufacturing sectors, with a particularly important place in the automotive and textile sectors. However, there is a need to increase the rate of production based on high technology and to further modernize the industrial infrastructure. Bursa's industrial production should be redirected towards medium-high technology based industries in order to increase its global competitiveness. To this end, it is of great importance to strengthen Bursa's industrial infrastructure through industrial investments and incentive policies.

Table 4. GDP Trends in Türkiye and Bursa by Sector (2016–2021)

Year	Türkiye's Total GDP (Million TL)	Türkiye's Industrial GDP (Million TL)	Manufacturing (Million TL)	Bursa's Total GDP (Million TL)
2016	2,626,560	514,902	435,890	106,485
2017	3,133,704	646,827	551,276	129,187
2018	3,758,774	837,564	715,797	160,278
2019 (r)	4,311,733	942,048	788,787	178,187
2020 (r)	5,048,220	1,149,840	965,942	203,646
2021	7,248,789	1,888,149	1,609,779	302,121

An analysis of the development of Bursa's Gross Domestic Product (GDP) at current prices reveals a significant increase between 2016 and 2021. While in 2016, Bursa's total GDP was 106.4 billion TL, it increased to 302.1 billion TL in 2021. In this process, total GDP increased by 183.72 percent. Industrial GDP grew by 244.13 percent, from TL 38.7 billion to TL 133.3 billion. The manufacturing sector showed a similar development, with the value of production increasing by 243.96 percent, from 36.5 billion TL in 2016 to 125.7 billion TL in 2021.

Bursa's industrial and manufacturing sectors have a large share in the total economic structure of the province. As of 2021, the industrial sector accounts for 44.11% of Bursa's GDP, while the manufacturing industry has a share of 41.60%. These ratios show that Bursa's economic activities are largely based on industrial production. On a sectoral basis, Bursa has an important position in Türkiye in the field of industry and manufacturing. As of 2021, Bursa accounts for 7.06% of Türkiye's total industrial production and 7.81% of the manufacturing sector.



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Bursa's industrial and manufacturing sectors also have an important ranking in Türkiye. While Bursa ranked second in industrial production in Türkiye between 2016-2019, it dropped to fourth place in 2020 and 2021. However, in terms of total GDP, Bursa has consistently ranked fourth between 2016 and 2021.

In general, although Bursa's industrial and manufacturing sectors have shown strong growth, it is observed that competition has increased and other industrial cities have started to overtake Bursa in Türkiye's overall ranking. This situation reveals that the province needs to focus on technological investments and high value-added production to ensure sustainable growth in industrial production.

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

Sectors (NACE Rev 2)	Türkiye Number of Enterprises	Türkiye Share (%)	Bursa Number of Enterprises	Bursa Share (%)	Share in Türkiye (%)
B. Mining and Quarrying	5,055	3,39	216	1,88	4,27
05. Coal and Lignite Extraction	228	0,15	2	0,02	0,88
06. Crude Oil and Natural Gas Extraction	123	0,08	5	0,04	4,07
07. Metal Ores Mining	593	0,4	37	0,32	6,24
08. Other Mining and Quarrying	4,111	2,76	172	1,5	4,18
C. Manufacturing	139,507	93,66	11205	97,68	8,03
10. Manufacture of Food Products	21,481	14,42	1020	8,89	4,75
11. Manufacture of Beverages	550	0,37	21	0,18	3,82
12. Manufacture of Tobacco Products	95	0,06	1	0,01	1,05
13. Manufacture of Textile Products	11,752	7,89	2379	20,74	20,24
14. Manufacture of Clothing	9,477	6,36	703	6,13	7,42
15. Manufacture of Leather and Related Products	2,974	2	87	0,76	2,93
16. Manufacture of Wood, and Cork Products (Except Furniture)	8,464	5,68	361	3,15	4,27
17. Manufacture of Paper and Paper Products	2,429	1,64	140	1,22	5,76
18. Printing and Reproduction of Recorded Media	2,182	1,46	88	0,77	4,03
19. Manufacture of Coke and Refined Petroleum Products	239	0,16	8	0,07	3,35
20. Manufacture of Chemicals and Chemical Products	4,698	3,15	212	1,85	4,51

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

Sectors (NACE Rev 2)	Türkiye Number of Enterprises	Türkiye Share (%)	Bursa Number of Enterprises	Bursa Share (%)	Share in Türkiye (%)
21. Manufacture of Basic Pharmaceutical Products and Pharmaceuticals	264	0,18	2	0,02	0,76
22. Manufacture of Rubber and Plastic Products	10,485	7,04	753	6,56	7,18
23. Manufacture of Other Non-Metallic Mineral Products	8,024	5,39	273	2,38	3,4
24. Basic Metal Industry	4,141	2,78	203	1,77	4,9
25. Manufacture of Fabricated Metal Products (except machinery and equipment)	15,883	10,66	1100	9,59	6,93
26. Manufacture of Computers, Electronic and Optical Products	1,449	0,97	44	0,38	3,04
27. Electrical Equipment Manufacturing	4,238	2,84	179	1,56	4,22
28. Manufacture of Machinery and Equipment not Elsewhere Classified	14,366	9,65	928	8,09	6,46
29. Manufacture of Motor Vehicles, Trailers and Semi-Trailers	2,465	1,65	449	3,91	18,22
30. Manufacture of Other Means of Transportation	767	0,51	21	0,18	2,74
31. Furniture Manufacturing	12,171	8,17	2131	18,58	17,51
32. Other Manufacturing	3,027	2,03	102	0,89	3,37
D. Electricity, Gas, Steam and Air Conditioning Production and Distribution	4,381	2,94	50	0,44	1,14
35. Production and Distribution of Electricity, Gas, Steam and Ventilation Systems	4,381	2,94	50	0,44	1,14
Total – Industry Sectors	148,943	100	11471	100	7,7

When the sectoral distribution of industrial enterprises in Bursa is analyzed, it is seen that a total of 11,471 enterprises were operating as of 2021. Bursa has 7.70% of the industrial enterprises in Türkiye and the manufacturing sector in particular has the largest share.

The manufacturing sector accounts for 97.68% of the industrial enterprises in Bursa, with a total of 11,205 enterprises operating in this field. In Türkiye, there are 139,507 enterprises in the manufacturing sector and Bursa is home to 8.03% of Türkiye's manufacturing enterprises. Bursa's industrial structure is largely based on manufacturing, which supports the province's export-oriented economic structure.

The manufacture of textile products occupies an important place in Bursa's industry. There are 2,379 textile enterprises in Bursa and these enterprises constitute 20.24% of the textile production facilities in Türkiye. Bursa is one of Türkiye's largest production centers in the textile sector. There are also 2,131 enterprises in furniture manufacturing and this sector accounts for 18.58% of total industrial enterprises in Bursa. In furniture manufacturing, Bursa has 17.51% of the 12,171 enterprises operating in Türkiye. The manufacture of food products is also an important component of Bursa's industry. With 1,020 food production enterprises, Bursa is home to 4.75% of total food production enterprises in Türkiye. Food processing facilities, especially those based on local agricultural products, increase the diversity of Bursa's industry.

The industrial branches related to the automotive sector in Bursa are also noteworthy. There are 449 motor vehicles, trailers and semi-trailers manufacturing enterprises in Bursa. These enterprises constitute 18.22% of the total enterprises in Türkiye. This ratio shows that Bursa is one of Türkiye's strongest production centers in the automotive industry. In addition, with 928 machinery and equipment manufacturing enterprises, Bursa has 6.46% of the total machinery industry enterprises in Türkiye.

In general, the manufacturing sector constitutes the largest part of Bursa's industry. In sectors such as textile, automotive, machinery and furniture manufacturing, Bursa occupies a very important position throughout the country. The development of Bursa's industry is shaped especially by export-oriented sectors. In order to increase Bursa's industrial competitiveness in the coming years, it will be important for Bursa to move towards high value-added production, develop industrial technologies and focus on digitalization processes.

1.1.3 Service and Tourism Sector

The service and tourism sector in Bursa has been developing rapidly in recent years and contributes significantly to the economic structure of the province. Bursa has a significant tourism potential with its historical and cultural richness, natural beauties and industrial infrastructure. The service sector in the city is particularly concentrated in areas such as health, education, finance and trade.

The service sector has an important share in Bursa's economic structure. Although not as much as the industrial sector, investments in the service sector in the city have increased in recent years. Especially large shopping centers, hotels and restaurants contribute to the growth of the service sector. Bursa also has a high potential for health tourism. Investments in health services contribute to the economic structure of the city.

The tourism sector has become one of Bursa's major sources of income. Historical sites and natural beauties attract local and foreign tourists to the city. Uludağ in Bursa is one of the most important centers of Türkiye in terms of winter tourism. During the winter season, activities such as mountaineering, skiing and mountain walks attract tourists. Apart from that, the historical and cultural sites in Bursa are especially noteworthy for being the first capital of the Ottoman Empire. Places such as the Green Tomb, the Great Mosque and Tophane are among the places that attract great interest from tourists coming to the city.

Health tourism is also among the rising values of Bursa. Health-related services such as modern health facilities, aesthetic surgery and spa tourism have increased interest in Bursa health tourism. Spas and thermal facilities in Bursa are especially preferred by local and foreign tourists.

1.1.4 Trade, Energy and Logistics

Bursa is one of the most important centers of Türkiye in terms of trade, energy and logistics sectors. The share of these sectors in Bursa's economic structure is quite high and they play a key role in the city's national and international economic relations. Trade activities in Bursa are mainly related to industrial production and are concentrated in sectors such as automotive, textiles and furniture. Automotive products constitute a significant portion of Bursa's industrial exports, and approximately 20% of Türkiye's automotive exports come from Bursa General Secretariat of Uludağ Exporters' Associations (Bursa Province Sector Report, 2021).

Bursa's trade sector operates not only in domestic markets but also in foreign markets. The geographical location of the province, its proximity to the ports of Istanbul and transportation opportunities to Europe make Bursa advantageous in terms of foreign trade. Especially the automotive and textile sectors play a major role in Bursa's exports, with the textile sector accounting for approximately 10% of total textile exports in Türkiye (Bursa Province Sector Report, 2021).

In terms of the energy sector, Bursa has a significant energy demand in parallel with increasing industrial and commercial activities. Electricity consumption in the province was approximately 8 billion kWh in 2020. Bursa's energy consumption is mainly driven by the industrial sector, while the service sector also has a significant share. The use of renewable energy sources is also increasing in the city. Especially solar energy investments are gaining importance and the installed renewable energy capacity in Bursa has reached 100 MW (Bursa Economic and Social Indicators, 2023).

The logistics sector is a critical sector supporting Bursa's economic structure. Bursa is one of Türkiye's most advantageous logistics hubs with its strategic location to important centers such as Istanbul, Ankara and İzmir. The number of enterprises operating in the logistics sector in Bursa exceeded 400 as of 2021. These companies contribute to the growth of the economy by ensuring that industrial products in Bursa reach domestic and foreign markets. Significant infrastructure investments are being made in the city to support the development of the logistics sector. Projects such as Bursa Yenişehir Airport, Gemlik Port and high-speed rail lines further strengthen Bursa's commercial potential by increasing logistics capacity. In particular, the development of Gemlik Port and the establishment of railway connections are important investments that will expand Bursa's international trade volume.

The energy sector in Bursa is important not only in terms of production and distribution but also in terms of energy efficiency. The city's industrial facilities are undergoing energy efficient modernization efforts, leading to a reduction in energy costs and an increase in the competitiveness of industrial production. In this context, energy efficiency projects reduce energy costs by 15-20% in Bursa's industrial facilities. Investments in Bursa's energy and logistics infrastructure not only accelerate the city's economic development but also support the transition to an environmentally sensitive economic structure. Renewable energy investments aim to ensure sustainable economic growth by encouraging environmentally friendly production processes. Accordingly, energy investments in Bursa support both an environmentally friendly industrial approach and sustainable development.

Bursa's geographical advantages come to the fore in the trade sector, especially in domestic and foreign trade of industrial products. The presence of Gemlik Port and nearby organized industrial zones increases the city's share in Türkiye's trade volume. Thanks to these logistical advantages, Bursa stands out in export-oriented production and reaches a share of nearly 8% in Türkiye's total exports.

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

Technological and sectoral developments in Bursa have significant impacts on the labor market. Technological innovations and digitalization processes, especially in the industrial sector, are changing the demands for the quality and skills of the workforce. Bursa is heavily affected by technological transformation due to its industry concentrated in the automotive and textile sectors. Technological developments have increased the use of automation and robotic systems in Bursa, leading to a contraction in employment in some business areas, while creating new job opportunities in others. The widespread use of robotic automation systems, especially in production facilities in the automotive sector, makes it difficult to employ low-skilled labor in routine jobs, while increasing the need for qualified labor with technical knowledge.

A similar situation is observed in the textile sector. As the use of automation and digital technologies increases, the employment of low-skilled workers in the textile sector is decreasing and the demand for labor with digital competencies is increasing. While the production capacities of textile enterprises in Bursa are increasing thanks to technology investments, it is imperative that the workforce consists of more educated and technologically equipped individuals (Bursa Provincial Report, 2021).

The effects of technological transformation are also seen in the service sector. The increase in digitalization processes, especially in the health and education sectors, makes it necessary to employ healthcare professionals and educators who have a good command of technology. The use of technologies such as digital health applications and remote patient monitoring in the health sector has made it mandatory for healthcare professionals to quickly adapt to these new technologies.

Sectoral developments also play an important role in shaping the labor market. Bursa's rapid growth in the industrial sector has brought about a shift from a traditional industrial workforce to a more skilled labor force. Developments in the manufacturing sector have increased the demand for workers with machine-operator skills, while making it more difficult to employ workers with more basic skills (Bursa Economic and Social Indicators, 2023). The expansion in the service sector is changing the sectoral distribution of the labor force in Bursa and creating new areas of employment. In particular, the growth in health tourism and the retail sector increases the demand for qualified labor. This creates the need to expand and diversify vocational training programs.

Bursa's increasing investments in the energy sector, together with the commissioning of renewable energy projects, creates new occupational fields and employment opportunities in the labor market. This increases the need for specialized labor force, especially in fields such as environmental engineering and energy systems technicians. In order to train such qualified labor force, it is important to increase vocational training and cooperation between universities and industry.

Technological change plays a critical role especially in the integration of the young population into the labor market. Equipping young people with digital skills and increasing high-tech training will contribute to Bursa's economic growth. Increasing the proportion of young people working in technology-intensive sectors will increase Bursa's competitiveness in the long term (Bursa Economic and Social Indicators, 2023)

In conclusion, the effects of technological and sectoral developments on the labor market in Bursa necessitate the transformation of the qualifications of the labor force and the employment profiles of sectors. If technological transformation and sectoral growth continue, it is foreseen that the demand for highly skilled employees in the labor market will increase, while additional training programs will become mandatory for low-skilled employees. It is important that the private and public sectors develop joint strategies for the successful management of these processes.

1.3 Employers' Perceptions and Preferences towards Migrant Workers

The perceptions and preferences of employers in Bursa towards migrant workers are closely related to the economic structure of the province and the characteristics of the labor market. A significant portion of employers in Bursa attach more importance to the skills, work experience and professional qualifications of their employees, regardless of their gender or origin. However, when employers' perceptions of the labor force in Bursa are evaluated, it is generally observed that professional skills and work experience are the most sought-after qualifications.

According to the labor market survey conducted in Bursa province, the rate of employers not demanding any level of education for their vacancies was as high as 40.7%. This indicates that employers have a flexible attitude towards employing low-skilled labor, including migrant workers (ISKUR, 2023). Migrant workers are generally employed in low-skilled or unskilled jobs. The high employment rate of migrant workers in textile, apparel and other manufacturing sectors in industrialized regions such as Bursa indicates that employers have a positive perception of these workers. Employers' preferences for migrant workers are directly related to the labor shortage in the labor market. The fact that approximately 31% of open jobs in Bursa province cannot be filled reveals that migrant workers play a critical role in closing this gap (ISKUR, 2024).

One of the important factors in employers' perceptions of migrant workers in Bursa is economic and social conditions. Especially in the post-pandemic period, factors such as economic uncertainties, supply-demand imbalance in the labor market and the integration of migrants into the labor market shape employers' attitudes towards migrant workers. The majority of employers focus on skills and experience rather than gender or ethnicity when recruiting for job vacancies (ISKUR, 2024).

However, it is not possible to say that perceptions of migrant workers are entirely positive. Migrant workers often face challenges such as unregistered work, low wages and job insecurity. It is also known that some employers prefer migrant workers as a lower-cost source of labor. This raises the need to improve the working conditions and job security of migrant workers

As of 2023, a total of 134,759 job vacancies in Bursa were submitted to ISKUR, of which about half were filled, indicating that there is a serious labor shortage and that migrant workers play a critical role in filling these gaps. Employers' preferences and employment policies regarding migrant workers are generally shaped by the supply-demand balance of the labor market. In Bursa, it is more common for migrant workers to be employed in such occupations, especially in occupations such as machine operators, weavers and gas metal arc welders. This situation reveals that employers prefer migrant workers in certain occupational groups.

In addition to economic factors, social cohesion and integration processes have an important place in the integration of migrant workers into the labor market and the shaping of employers' policies towards migrants. Some of the practices for migrant workers in Bursa involve unregistered working conditions, which leads to both insufficient protection of workers' social rights and unequal conditions in the labor market. Ensuring the social security of migrant workers and overcoming deficiencies in job security are important areas where employers in Bursa need to improve their employment practices for migrants (ISKUR, 2024).

The obstacles faced by employers in Bursa in the recruitment of migrant workers are shaped by both legal regulations and the dynamics of the labor market. One of the biggest obstacles in the process of employing migrant workers is the lengthy and complex procedures for obtaining work permits. Employers, especially in small and medium-sized enterprises, complain that managing such bureaucratic procedures is costly and time-consuming. The language barrier is another important factor that makes it difficult for migrant workers to communicate at work. Employers note that the lack of language reduces work efficiency and complicates the integration process, especially in sectors that require production, service and customer relations. There are also gaps in the professional qualifications of migrant workers and their alignment with the demands of the Turkish labor market. Limited access to vocational training programs stands out as one of the biggest challenges employers face in the process of employing migrant workers.

Informal employment is also an important issue. Employers may tend to employ migrant workers informally due to the cost of insuring them. However, this exposes both employers and migrant workers to legal risks.

When the obstacles faced by employers in the recruitment process of migrant workers in Bursa are analyzed, it is understood that the main problem faced by employers in recruiting qualified employees is the lack of sufficient applications. In Bursa, 91.1% of employers see the lack of sufficient applications for open positions as the main problem. Another important obstacle is that the labor force does not have the necessary professional skills and qualifications. 81.8% of employers in Bursa cite this as one of the main recruitment challenges. For migrant workers, the situation becomes even more complex, as there are problems in aligning their professional competencies with the standards in the Turkish labor market (ISKUR, 2024).

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

The manufacturing sector is the leading sector providing the highest employment in Bursa. The manufacturing sector constitutes the majority of total enterprises in Bursa and this sector stands out with a density above the average of Türkiye. This situation reveals the strategic importance of Bursa in industrial production in Türkiye. After the manufacturing sector, the sectors that provide the highest employment are wholesale and retail trade and administrative and support service activities. In Bursa, 75.5% of enterprises with 20 or more employees operate in the manufacturing, wholesale and retail trade and construction sectors (ISKUR, 2024). The administrative and support service activities sector also stands out as an important employment area. This sector ranks third in terms of job vacancies in Bursa and occupies a significant place in the labor market with a total of 762 vacancies (ISKUR, 2024).

In Bursa province, employers' **demand for qualified labor force** is at a significant level and approximately 81.8% of enterprises consider the lack of required professional knowledge and skills of applicants as the main problem in recruitment (ISKUR, 2024). Especially in the manufacturing sector, there are difficulties in recruitment in occupations such as machine operators, weaving machine operators and gas metal arc welding. This situation clearly shows that technical and vocational trainings should be expanded in the Bursa labor market and training programs for qualified workforce should be increased (ISKUR, 2024).

The demand for unqualified labor force in Bursa is quite high. Approximately 40% of employers do not demand any level of education for their vacancies; this situation reveals that there is a high demand for unqualified jobs. The most demanded unqualified occupations in Bursa are physical laborer, cleaning staff and general laborer (ISKUR, 2024).

The demand for young labor force in Bursa is high due to the province's economic structure and industrial infrastructure. As of the end of 2023, the number of registered unemployed in Bursa is 94,489 and 20.5% of these people are young people between the ages of 18-24; this situation is important for the integration of the young population into the labor market. Especially in sectors such as automotive, textile and retail, employers prefer young people to have technical and vocational skills. In this context, strengthening vocational training and skills acquisition programs for the young population is critical to meet the demand for young labor (ISKUR, 2024).

The demand for female labor force in Bursa is increasing, especially in certain sectors. Women make up 36.2% of total employees in Bursa and are employed at high rates, especially in sectors such as education (70%) and health and social services (70%). Employers' preferences for female labor force are generally shaped by sectoral needs and occupational skills (ISKUR, 2024).

Seasonal labor demand in Bursa is particularly prominent in the agriculture and tourism sectors. In districts with intensive agricultural activities, labor demand increases significantly in certain periods of the year, especially during harvest periods. In addition, in the tourism sector, especially in the Uludağ region where winter tourism is intense, the need for seasonal personnel is also significant. This situation reveals that seasonal jobs have an important place in Bursa's employment profile and that labor force planning is required to meet this demand (ISKUR, 2024).

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

When the educational attainment and occupational qualifications of women in Bursa are analyzed, the share of women in total employees is at the same level as in Türkiye. The sector where women are most intensively employed is the manufacturing sector; however, the proportions of women employed in education and health sectors are relatively higher compared to other sectors.

Increasing women's labor force participation rate in Bursa is directly related to raising women's vocational and technical education levels. Women working in jobs that do not require qualifications are supported to participate in the labor market by gaining skills and experience through vocational training courses and programs. Vocational training courses provided by ISKUR play an important role in increasing the employability of women (ISKUR, 2024).

Part-time working positively affects women's labor force participation. In Bursa, the rate of female employees in workplaces with part-time working is 36.2%, while this rate is 28.6% in workplaces without part-time working. It is understood that the part-time working model encourages female employment especially in service sectors. In particular, 64% of enterprises in the culture, arts, entertainment, recreation and sports sector have part-time work, and women's employment is higher in these sectors. (ISKUR, 2024).

An analysis of women's work experience and the obstacles they face in employment in Bursa shows that a significant portion of women are looking for jobs in occupations that do not require qualifications. A significant portion of female jobseekers registered with ISKUR in Bursa have difficulty in entering the labor force because they do not possess the professional skills demanded by employers. This situation limits women's ability to take a more active role in the labor market and reduces their long-term employment opportunities.

One of the important obstacles facing women's employment in Bursa is the lack of work-family life balance. This situation constitutes a deterrent factor for women's participation in the labor force. In order to overcome this obstacle, flexible working models and part-time working opportunities should be increased (ISKUR, 2024).

One of the biggest obstacles to women's career development is the difficulties they face in achieving leadership roles. In workplaces, women are less likely to be promoted to managerial positions compared to men. This limits women's participation in decision-making processes at the workplace and makes career advancement difficult. Moreover, the lack of flexible working models makes it difficult for women to balance their family responsibilities with their professional careers.

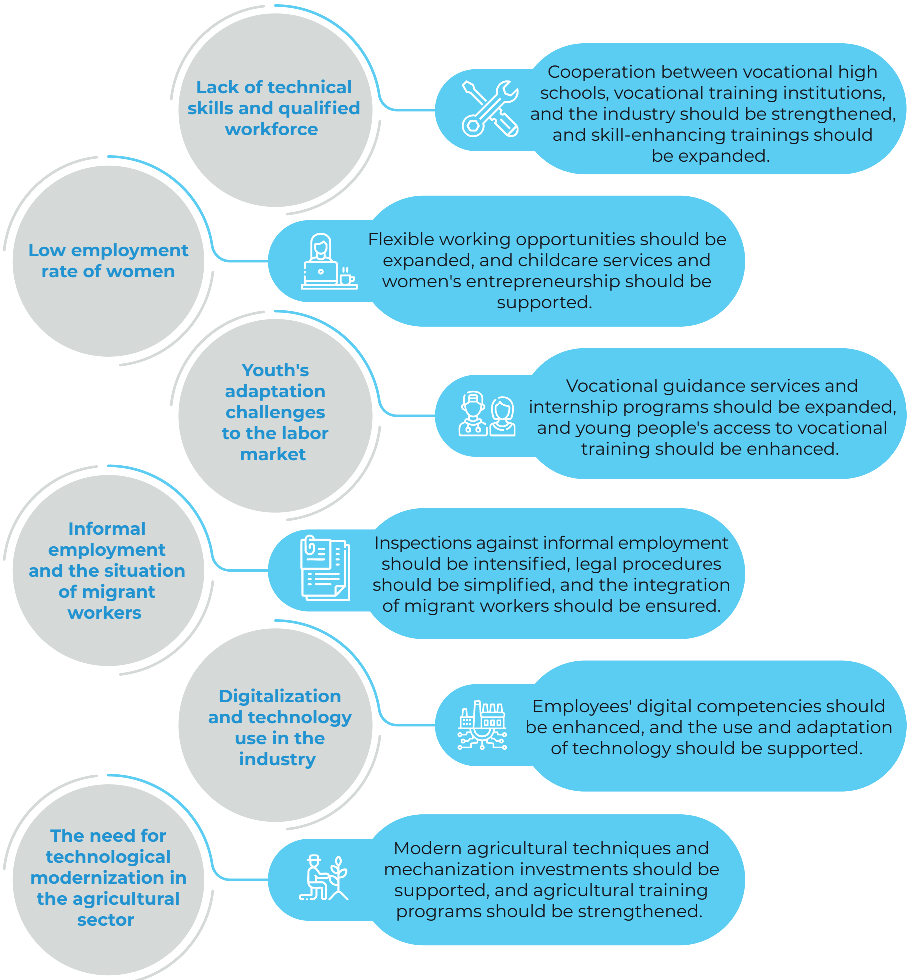
In Bursa, gender differences in the labor market are particularly evident in areas such as employment rates, sectoral preferences and wage distribution. The labor force participation rate of women is lower than that of men, and their sectoral concentration is generally in areas such as education, health and service sectors. In contrast, men are predominantly employed in sectors such as manufacturing, construction and heavy industry.

One of the most important factors limiting women's participation in the labor force is the challenges related to work-family life balance. Limited daycare facilities, the lack of flexible working models and the impact of traditional social roles make it difficult for women to participate in full-time employment. While the employment rate of men is higher than that of women, the representation of women in managerial positions remains low even in sectors where the female employment rate is increasing.

1.6 Prominent Findings in Literature Review

As a result of the literature review, the main findings on the labor market in Bursa are summarized in Figure-2.

Figure 2. Findings from the Literature Review on Bursa



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

> **One of the main factors limiting women's participation in the labor force is the challenge of balancing work and family life. Limited access to childcare services, the lack of widespread flexible working models, and the influence of traditional gender roles make it difficult for women to engage in full-time employment.**

CHAPTER II

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CHAPTER II

2. ANALYSIS OF SECONDARY DATA AND FINDINGS

In this section, the demographic structure, labor market, employment dynamics, employment dynamics, social security situation and migration movements of Bursa are analyzed in detail based on data from TURKSTAT, ISKUR, SSI, Ministry of Labor and Social Security and Presidency of Migration Management.

2.1 Population and Demographic Statistics

2.1.1 TURKSTAT Population Registration System Data

Populations of settlements are calculated by taking into account the population living in institutional places together with the population from the Address Based Population Registration System updated by the Ministry of Interior General Directorate of Population and Citizenship Affairs. Individuals staying in institutional places such as barracks, prisons, nursing 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 SuTPs status are not included in the population.

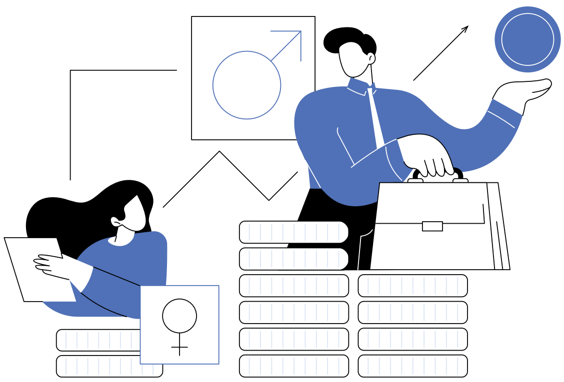

Table 6. TURKSTAT, Address Based Population Registration System Results, 2023

Population	Years	Türkiye	Bursa
Total Population	2022	85,279,553	3,194,720
	2023	85,372,377	3,214,571
Provincial and District Centers	2022	79,613,279	3,194,720
	2023	79,399,292	3,214,571
Annual Population Growth Rate	2021-2022	7,1	14,8
	2022-2023	1,1	6,2

2022 and 2023 population data for Bursa and Türkiye are presented comparatively (Table 6). According to the data, the total population of Türkiye will reach 85.3 million in 2023, while the population of Bursa will increase to 3.21 million. While the increase in the population living in provincial and district centers in Bursa is noteworthy, this rate has decreased slightly in Türkiye.

Looking at the annual population growth rates, while the rate of increase in Türkiye as a whole remained at 1.1% in the 2022-2023 period, this rate was realized as 6.2% in Bursa. The fact that Bursa's annual population growth rate is above Türkiye's average indicates the province's migration potential and changes in its demographic structure. This situation requires a more detailed analysis of Bursa's economic, social and urban development dynamics.

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

Population	Gender	Türkiye	Bursa
Total Population	**Total**	85,279,553	3,194,720
	Male	85,372,377	3,214,571
	Female	79,613,279	3,194,720
Provincial and District Centers	**Total**	79,399,292	3,214,571
	Male	7,1	14,8
	Female	1,1	6,2
Population Density		85,279,553	3,194,720

As of 2023, based on the total population distribution by gender in Bursa and Türkiye overall, as well as the proportion of the population residing in provincial/district centers and population density (Table 8), Bursa exhibits a balanced gender distribution, with 1,605,941 males and 1,608,630 females.

The fact that the population living in provincial and district centers in Bursa is equal to the total population shows that urban areas are the main settlement areas of the province. The limited population in rural areas can be attributed to Bursa's intensive migration to industrial and commercial centers. In terms of population density, Bursa, with 308 people/km², is well above Türkiye's average of 111 people/km² . This high population density supports Bursa's status as an economic and social center of attraction.

Table 8. Median Age by Province and Gender, 2023

Years	Gender	Türkiye	Bursa
2022	**Total**	33,5	35,4
	Male	32,8	34,7
	Female	34,2	36,1
2023	**Total**	34,0	35,9
	Male	33,2	35,1
	Female	34,7	36,6

In 2022 and 2023, the median age distribution by gender for Bursa and Türkiye is presented comparatively (Table 9). According to the data, the median age of Bursa is higher than the average age of Türkiye and the population of the province tends to age. As of 2023, while the median age in Türkiye is calculated as 34, this value is recorded as 35.9 in Bursa.

Analyzed by gender, the median age of women in Bursa is 36.6 years, while the median age of men is 35.1 years. As in Türkiye in general, the median age of women in Bursa is higher than that of men. Compared to 2022, the median age has increased both in Türkiye and Bursa.

Table 9. Population by Marital Status and Gender, 2023

Marital Status	Gender	Türkiye	Bursa
Total	**Total**	67,060,744	2,558,788
	Male	33,339,609	1,268,496
	Female	33,721,135	1,290,292
Never Married	**Total**	19,231,798	648,877
	Male	10,911,913	378,05
	Female	8,319,885	270,827
Married	**Total**	40,876,455	1,633,937
	Male	20,460,478	814,695
	Female	20,415,977	819,242
Divorced	**Total**	3,205,212	123,467
	Male	1,415,476	53,386
	Female	1,789,736	70,081
Widower	**Total**	3,747,279	152,507
	Male	551,742	22,365
	Female	3,195,537	130,142

As of 2023, the distribution of marital status by gender in Bursa and Türkiye is presented comparatively (Table 10). According to the data, the numerical distribution of never-married, married, divorced and separated individuals in Bursa is broadly in line with the general trends in Türkiye. While there are 2,558,788 people in Bursa, 648,877 people have never been married, 1,633,937 people are married, 123,467 people are divorced and 152,507 people have lost their spouses.

When analyzed by gender, it is noteworthy that the number of never-married men (378,050) is higher than that of women (270,827), but the number of post-divorce women (70,081) is higher than that of men (53,386). Similarly, the fact that the number of widowed women (130,142) is much higher than the number of widowed men (22,365) indicates that women are less likely to remarry after the loss of their spouses compared to men. The distribution of marital status in Bursa exhibits a structure parallel to the general trends in Türkiye due to urban lifestyles and social dynamics.

Table 10. Foreign Population

Years	Gender	Türkiye	Bursa
2022	**Total**	1,823,836	61,150
	Male	902,124	30,324
	Female	921,712	30,826
2023	**Total**	1,570,543	59,284
	Male	762,672	29,288
	Female	807,871	29,996

In 2022 and 2023, the distribution of foreign population by gender in Bursa and Türkiye is presented comparatively (Table 11). According to the data, it is seen that the foreign population is decreasing in both Türkiye and Bursa. This decline can be attributed to migration dynamics, economic conditions and social factors. While 61,150 foreigners resided in Bursa in 2022, this number decreased to 59,284 in 2023. A similar decline is observed across Türkiye, with the total foreign population decreasing from 1,823,836 to 1,570,543.

Analyzed by gender, the male and female foreign population in Bursa in 2023 was 29,288 and 29,996, respectively. As in Türkiye as a whole, the female foreign population in Bursa is higher than the male population. The decrease in the foreign population should be evaluated within the framework of changes in migration policies, economic conditions and social integration processes.

Table 11. Average Household Size, 2008-2023

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

The change in the average household size for Türkiye and Bursa between 2008 and 2023 is shown (Table 12). According to the data, it is observed that household size has decreased over the years. This trend can be attributed to the decline in fertility rates, urbanization process and individualized lifestyles.

Bursa exhibits a similar downward trend in terms of household size to Türkiye as a whole. In 2008, while the average household size in Türkiye was 4 people, this value was recorded as 3.7 in Bursa. Over time, household size has decreased both in Türkiye and Bursa, and as of 2023, it has fallen to 3.1 in Türkiye and to the same level in Bursa. This indicates that smaller households are becoming more common and family structure is changing in Bursa.

Table 12. Age Dependency Ratio, 2007-2023

Age	Türkiye	Bursa
Total	85,372,377	3,214,571
0-14	18,311,633	655,783
15-64	58,337,938	2,223,800
65 +	8,722,806	334,988
Total Age Dependency Ratio (%)	46,3	44,6
Child Dependency Ratio (%)	31,4	29,5
Elderly Dependency Ratio (%)	15,0	15,1

As of 2023, population distribution by age groups and age dependency ratios in Türkiye and Bursa are presented comparatively (Table 13). According to the data, Bursa's total age dependency ratio is slightly lower compared to Türkiye. As of 2023, Bursa's total age dependency ratio is 44.6%, while this rate is calculated as 46.3% in Türkiye. This rate refers to the sum of the working age population (15-64 years), children in the 0-14 age group with dependents and individuals over 65 years of age.

An analysis of the subdivisions shows that Bursa's child dependency ratio is 29.5%, which is lower than Türkiye's average of 31.4%. This indicates that Bursa has a lower proportion of young population compared to the country as a whole and that the province has a more demographically balanced age structure. On the other hand, the elderly dependency ratio in Bursa is 15.1%, close to the 15% rate in Türkiye. These data show that Bursa's age dependency ratios are more balanced compared to Türkiye in general and that the province has a stable demographic structure in terms of both young and old population.

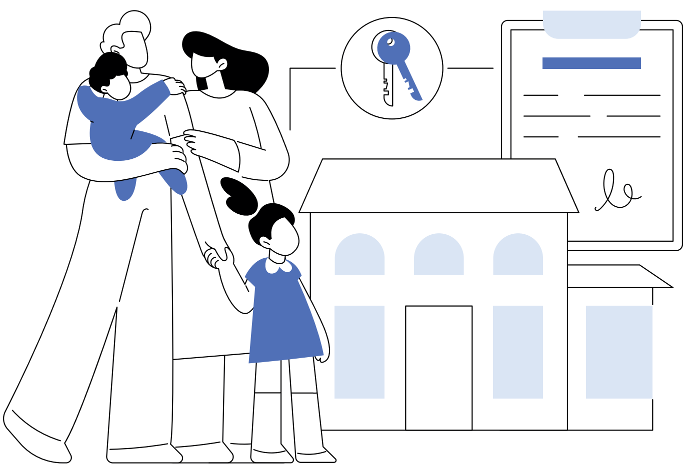

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Table 13. Annual Population Growth Rate and Population Density by Years, 2007-2023

Population	Years	Türkiye	Bursa
Annual Population Growth Rate (%)	2007-2008	13,1	27,5
	2008-2009	14,5	16,9
	2009-2010	15,9	21,3
	2010-2011	13,5	17,7
	2011-2012	12,0	13,5
	2012-2013	13,7	19,5
	2013-2014	13,3	16,8
	2014-2015	13,4	19,5
	2015-2016	13,5	20,5
	2016-2017	12,4	12,1
	2017-2018	14,7	19,5
	2018-2019	13,9	20,4
	2019-2020	5,5	14,8
	2020-2021	12,7	14,7
	2021-2022	7,1	14,8
	2022-2023	1,1	6,2
Population Density(R)	2007	92	235
	2008	93	242
	2009	94	246
	2010	96	251
	2011	97	255
	2012	98	259
	2013	100	264
	2014	101	268
	2015	102	274
	2016	104	279
	2017	105	283
	2018	107	288
	2019	108	294
	2020	109	299
	2021	110	303
	2022	111	308
	2023	111	310

The annual population growth rates and population density of Türkiye and Bursa between 2007-2023 are presented comparatively (Table 14). According to the data, although Bursa's population growth rate has fluctuated over the years, it showed a significant decline in the period 2022-2023. This can be attributed to changes in demographic dynamics, migration movements and the urbanization process. Bursa exhibits a different trend from Türkiye in terms of annual population growth rate. In the 2022-2023 period, Bursa's annual population growth rate was recorded as 6.2%, while this rate remained at 1.1% in Türkiye. In previous years, Bursa's population growth rate was generally in line with Türkiye's average, but in some periods it was well above the national average. In particular, it reached 27.5%, 20.5% and 20.4% in the 2007-2008, 2015-2016 and 2018-2019 periods, respectively. These changes can be attributed to Bursa's migration tendencies and the mobility in its demographic structure due to industry and trade.

In terms of population density, Bursa is well above Türkiye's average. As of 2023, while Türkiye's population density is 111 people/km², this value is calculated as 310 people/km² in Bursa. This indicates the dense urban structure of Bursa and the impact of industrial centers on population.

2.2 Labor Force and Employment Statistics

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

Table 14. Unemployment Rate Change

Year	Confidence Interval	Thereshold Values	Türkiye	Bursa
2022	**Ratio**		10,4	8,9
	95% Confidence Interval	**Lower Limit**	10,2	8,0
		Upper Limit	10,6	9,7
2023	**Ratio**		9,4	8,3
	95% Confidence Interval	**Lower Limit**	9,2	7,3
		Upper Limit	9,6	9,2

In 2022 and 2023, unemployment rates in Bursa are lower compared to Türkiye as a whole (Table 15). In 2022, the unemployment rate in Türkiye was 10.4%, while in Bursa it was 8.9%. In 2023, while the unemployment rate in Türkiye decreased to 9.4%, it dropped to 8.3% in Bursa. When the 95% confidence interval is evaluated, the unemployment rate in Bursa ranged between 8% and 9.7% in 2022, while this range was calculated between 7.3% and 9.2% in 2023. These data show that Bursa's unemployment rate is below Türkiye's average and that the province's employment market has a relatively more stable structure. The opportunities Bursa offers in the labor market as an industrial and commercial center can be considered as one of the main factors that keep unemployment rates low compared to the national average.

Table 15. Employment Rate Change

Year	Confidence Interval	Threshold Values	Türkiye	Bursa
2022	**Ratio**		47,5	50,6
	95% Confidence Interval	**Lower Limit**	47,3	49,2
		Upper Limit	47,8	52,0
2023	**Ratio**		48,3	51,3
	95% Confidence Interval	**Lower Limit**	48,0	50,1
		Upper Limit	48,6	52,6

According to the employment rates for Türkiye and Bursa in 2022 and 2023 (Table 16), employment rates in Bursa are above the average for Türkiye and show a slight increase in 2023. In 2022, the employment rate in Türkiye was 47.5%, while in Bursa it was 50.6%. By 2023, the employment rate in Türkiye as a whole increases to 48.3%, while in Bursa it rises to 51.3%. When the 95% confidence interval is evaluated, the employment rate in Bursa ranges between 49.2% and 52% in 2022, while this range is calculated between 50.1% and 52.6% in 2023. The fact that Bursa's employment rates are higher than Türkiye's average can be directly attributed to the province's strong industrial and commercial sectors. This indicates that employability in Bursa's labor market is high and the labor force is largely active.

Table 16. Change in Participation to Labor Force

Year	Confidence Interval	Threshold Values	Türkiye	Bursa
2022	**Ratio**		53,1	55,5
	95% Confidence Interval	**Lower Limit**	52,8	54,2
		Upper Limit	53,3	56,9
2023	**Ratio**		53,3	56,0
	95% Confidence Interval	**Lower Limit**	53,1	54,7
		Upper Limit	53,5	57,2

Table 16 shows the labor force participation rates and 95% confidence intervals for Türkiye and Bursa in 2022 and 2023 (Table 16). According to the data, Bursa has a higher labor force participation rate compared to Türkiye in general. In 2022, while the labor force participation rate in Türkiye was 53.1%, this rate was recorded as 55.5% in Bursa. By 2023, the labor force

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participation rate in Türkiye will increase to 53.3%, while in Bursa this rate is calculated as 56%.

When the 95% confidence interval is evaluated, the labor force participation rate in Bursa ranges between 54.2% and 56.9% in 2022, while this range is calculated between 54.7% and 57.2% in 2023. These data show that Bursa's labor market has a higher participation rate compared to Türkiye in general and that the province is a center of intense economic activity.

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 Jobs	Gender	Bursa	Türkiye
Open Vacancy Announcement	**Public**		109	30,190
	Private		134,650	2,646,816
	Total		134,759	2,677,006
Job Placement	**Public**	**Male**	57	11,581
		Female	4	4,935
		Total	61	16,516
	Private	**Male**	39,435	761,307
		Female	26,886	459,203
		Total	66,321	1,220,510
	Total	**Male**	39,492	772,888
		Female	26,890	464,138
		Total	66,382	1,237,026

According to the data on the number of ISKUR vacancies and job placements in the public and private sectors in Bursa and Türkiye (Table 17), as of 2023, the number of ISKUR vacancies in Bursa was recorded as 134,759, of which 134,650 were in the private sector and only 109 in the public sector.

An analysis of ISKUR job placement data shows that a total of 66,382 people were employed in Bursa, 66,321 of whom were employed in the private sector and only 61 in the public sector. When analyzed by gender, male employment in Bursa is higher than female employment with 39,492 people (26,890 females).

Table 18. Placements by Age Groups and Provinces

Age	Gender	Bursa	Türkiye
15- 24	Male	12,839	**268,499**
	Female	9,670	**189,225**
	Total	22,509	**457,724**
25 -29	Male	7,516	**149,511**
	Female	3,916	**81,088**
	Total	11,432	**230,599**
30- 34	Male	4,550	**93,457**
	Female	2,590	**49,210**
	Total	7,140	**142,667**
35-39	Male	3,526	**74,114**
	Female	2,852	**47,472**
	Total	6,378	**121,586**
40- 44	Male	3,578	**69,395**
	Female	3,351	**45,752**
	Total	6,929	**115,147**
45-49	Male	3,914	**59,465**
	Female	2,414	**30,307**
	Total	6,328	**89,772**
50-54	Male	2,467	**36,786**
	Female	1,291	**14,149**
	Total	3,758	**50,935**
55-59	Male	785	**14,998**
	Female	566	**5,047**
	Total	1,351	**20,045**
60-64	Male	251	**5,174**
	Female	198	**1,435**
	Total	449	**6,609**
65+	Male	66	**1,489**
	Female	42	**453**
	Total	108	**1,942**
Total	Male	**39,492**	**772,888**
	Female	**26,890**	**464,138**
	Total	**66,382**	**1,237,026**

As of 2023, according to the number of people placed in jobs through ISKUR by age groups and gender in Bursa and Türkiye (Table 18), a total of 66,382 people were employed through ISKUR, 39,492 of whom were male and 26,890 were female. This distribution reveals that employment opportunities differ by gender and that men are more likely to participate in the labor market. When analyzed by age groups, the number of people placed in jobs in the 15-24 age group is 22,509, and this age group constitutes the most employed group with ISKUR. As in Türkiye in general, the rate of employment of young labor force through ISKUR is high in Bursa. However, there is a significant decline in the number of people employed through ISKUR as they get older. The number of people employed in the 25-29 age group is 11,432, 7,140 in the 30-34 age group and 6,378 in the 35-39 age group. In the age group 50 and above, the number of people employed is gradually decreasing. In terms of women, the number of women employed is lower than men in every age group.

Table 19. Distribution of Job Placements by Educational Background

Education Status	Gender	Bursa	Türkiye
Illiterate	**Male**	61	667
	Female	31	174
	Total	92	841
Literate (no formal education completed)	**Male**	292	12,387
	Female	397	6,002
	Total	689	18,389
Primary Education	**Male**	15,302	307,813
	Female	10,346	147,342
	Total	25,648	455,155
Secondary Education	**Male**	17,964	326,857
	Female	10,517	183,932
	Total	28,481	510,789
Associate Degree	**Male**	2,815	62,086
	Female	2,826	65,746
	Total	5,641	127,832
Bachelor's Degree	**Male**	2,966	60,938
	Female	2,698	58,836
	Total	5,664	119,774

Table 19. Distribution of Job Placements by Educational Background

Education Status	Gender	Bursa	Türkiye
Master's Degree	**Male**	88	2,046
	Female	75	2,016
	Total	163	4,062
PhD	**Male**	4	94
	Female	0	90
	Total	4	184
Total	**Male**	39,492	772,888
	Female	26,890	464,138
	Total	66,382	1,237,026

The distribution of job placements made through ISKUR in Bursa and Türkiye is presented comparatively by education level (Table 19). Bursa is broadly in line with the general trends in Türkiye in terms of the distribution of job placements by education level. Primary education graduates constitute the largest group of job placements with a total of 25,648, while secondary education graduates constitute the second largest group with 28,481. The total number of placements of associate's degree graduates is 5,641, and the number of female placements in this group is higher than male placements. Total ISKUR placements of bachelor's degree graduates remained at a relatively low level with 5,664 people. As the level of education increases, placements through ISKUR decreases. In particular, it is noteworthy that only 163 master's degree graduates and only 4 PhD graduates were employed.

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

Occupational Groups	Bursa	Türkiye
Office Services Employees	11,254	249,265
Service and Sales Workers	14,328	431,768
Occupations that do not Require Qualifications	24,007	957,763
Skilled Agricultural, Forestry and Aquaculture Workers	463	22,411
Professional Professionals	8,200	167,044
Craftsmen and Related Occupations	12,847	205,836
Armed Forces Related Occupations	26	709
Technicians, Technicians and Assistant Professionals	8,987	165,596
Plant and Machine Operators and Assemblers	13,169	196,233
Managers	1,208	23,826
Total	94,489	2,420,451

The distribution of the unemployed registered with ISKUR in Bursa and Türkiye by occupational groups (Table 20) reveals in which occupational groups unemployment rates are higher in the labor market and the concentration of job seekers in certain occupations. According to the data, unemployment in unskilled occupations is the most common problem in Bursa, while unemployment rates are also high in the service and industrial sectors. The occupational group with the highest number of registered unemployed in Bursa is in the category of **"Unskilled Occupations"** with 24,007 people. This indicates that the low-skilled labor force has difficulty in being employed and the demand for unskilled labor force may be limited. There are 14,328 unemployed people in the service and sales personnel group and 11,254 unemployed people in the clerical services category. In the industrial sector, 13,169 people are unemployed in the **"Plant and Machinery Operators and Assemblers"** group, while 12,847 people are unemployed in the **"Craftsmen and Related Workers"** category.

Looking at the skilled labor force, 8,200 people in the **"Professional Professionals"** group and 8,987 people in the **"Technicians, Technicians and Assistant Professional Professionals"** category were recorded as unemployed. The unemployment rate in the **"Managers"** group is relatively low at 1,208 people. These data emphasize the mismatch between labor force and sector needs and the need to adapt vocational training to the labor market. In Bursa, especially the low-skilled labor force is disadvantaged in terms of employment, while unemployment is high in the industrial and service sectors. Considering that there is also unemployment in qualified occupations in the labor market, it is important to shape vocational training programs and workforce planning according to sector needs.

Table 21. Unemployed Registered with ISKUR by Age Groups

Age	Gender	Bursa	Türkiye
15 - 24	**Male**	10,442	257,307
	Female	8,918	228,122
	Total	19,360	485,429
25 -29	**Male**	8,758	245,394
	Female	9,734	251,120
	Total	18,492	496,514
30 - 34	**Male**	7,155	192,957
	Female	7,834	207,888
	Total	14,989	400,845

Table 21. Unemployed Registered with ISKUR by Age Groups

Age	Gender	Bursa	Türkiye
35-39	Male	5,996	163,319
	Female	6,854	186,245
	Total	12,850	349,564
40 - 44	Male	5,446	136,011
	Female	6,114	151,300
	Total	11,560	287,311
45-49	Male	3,825	92,109
	Female	4,367	101,076
	Total	8,192	193,185
50-54	Male	2,743	63,796
	Female	2,677	60,281
	Total	5,420	124,077
55-59	Male	1,288	29,772
	Female	1,053	25,258
	Total	2,341	55,030
60-64	Male	612	13,047
	Female	315	8,059
	Total	927	21,106
65+	Male	254	4,460
	Female	104	2,930
	Total	358	7,390
Total	Male	46,519	1,198,172
	Female	47,970	1,222,279
	Total	94,489	2,420,451

According to the distribution of the unemployed registered with ISKUR in Bursa and Türkiye by age groups and gender (Table 21), unemployment is highest in the 25-29 age group and the unemployment rate of women is higher than that of men. While there are 94,489 registered unemployed in Bursa, 46,519 of them are male and 47,970 are female. In terms of age groups, the number of unemployed in the 25-29 age group is the highest with 18,492 people. This indicates that the transition to employment after graduation is not easy and young adults have the most difficulty in entering the labor market in this age group. When evaluated together with the 19,360 unemployed in the 15-24 age group, it is understood that youth unemployment stands out as a significant problem.

It is observed that the number of unemployed registered with ISKUR decreases with increasing age. There are 14,989 unemployed in the 30-34 age group and 12,850 in the 35-39 age group. However, the fact that the number of unemployed people aged 40 and over continues to remain at certain levels despite the continued decline shows that the labor force is not sufficiently employed in this age range.

In terms of gender, the number of women unemployed registered with ISKUR is higher than men in almost every age group. The fact that women's unemployment is significantly higher especially in the 25-39 age group reveals the obstacles women face in entering the labor market as well as the difficulties they face in sustaining employment. Considering the general structure of the labor market in Bursa, the importance of supportive policies for youth and women's employment becomes even more evident.

Table 22. Distribution of ISKUR-Registered Unemployed by Age Groups by Educational Background

Education Status	Gender	Bursa	Türkiye
Illiterate	**Male**	191	7,971
	Female	268	15,619
	Total	459	23,590
Literate (no formal education completed)	**Male**	567	23,732
	Female	528	33,297
	Total	1,095	57,029
Primary Education	**Male**	18,516	465,555
	Female	15,896	388,427
	Total	34,412	853,982
Secondary Education	**Male**	18,301	470,158
	Female	15,669	406,134
	Total	33,970	876,292
Associate Degree	**Male**	3,319	104,149
	Female	6,798	191,638
	Total	10,117	295,787
Bachelor's Degree	**Male**	5,377	120,459
	Female	8,498	178,882
	Total	13,875	299,341
Master's Degree	**Male**	231	5,825
	Female	304	7,957
	Total	535	13,782

Table 22. Distribution of ISKUR-Registered Unemployed by Age Groups by Educational Background

Education Status	Gender	Bursa	Türkiye
PhD	**Male**	17	323
	Female	9	325
	Total	26	648
Total	**Male**	46,519	1,198,172
	Female	47,970	1,222,279
	Total	94,489	2,420,451

The distribution of the unemployed registered with ISKUR in Bursa and Türkiye is presented comparatively by education level (Table 22). According to the data, primary and secondary education graduates constitute the largest group among the unemployed with a total of 68,382 people. A similar trend is observed in Türkiye as a whole and it is understood that unemployment is most prevalent at these education levels. In Bursa, 36% of the unemployed are primary education graduates and 35% are secondary education graduates. This indicates that individuals with low levels of education struggle more in the labor market. Associate's and bachelor's degree graduates have a significant share among the unemployed with a total of 23,992 people. In particular, unemployment rates of women with associate's degrees (6,798 people) and women with bachelor's degrees (8,498 people) are higher than those of men.

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

Disadvantaged Groups	Job Placements	Gender	Bursa	Türkiye
Disabled People	**Public**	**Male**	1	451
		Female	0	104
		Total	1	555
	Private Sector	**Male**	2,329	27501
		Female	577	7,121
		Total	2,906	34,622
	Total	**Male**	2,330	27,952
		Female	577	7,225
		Total	2,907	35,177
Ex-convict / Injured in the War on Terror	**Public**	**Male**	0	165
		Female	0	3
		Total	0	168

Table 23 shows the employment status of disabled individuals, ex-convicts and individuals injured in the fight against terrorism in the public and private sectors in Bursa and Türkiye (Table 23). According to the data, the private sector has a higher share in the employment of disabled people compared to the public sector, while the employment rate of women disabled people remains quite low. The employment of ex-convicts and individuals injured in the fight against terrorism was realized at a very limited level. In Bursa, a total of 2,907 people with disabilities were employed, of which 2,330 were men and 577 were women. In Türkiye, a total of 35,177 people with disabilities were employed. Looking at the data on employment of disabled people, it is seen that the private sector employs more disabled people than the public sector. While the number of people with disabilities employed in the public sector in Bursa is only 1, this number reaches 2,906 in the private sector.

When analyzed by gender, it is noteworthy that the employment rate of women with disabilities is quite low compared to men. In Bursa, the number of disabled women employed in the private sector is 577 and the number of men is 2,329. In the public sector, this ratio is very limited as 0 women and 1 man. A similar trend is observed across Türkiye, where the employment rate of men with disabilities is significantly higher than that of women. This indicates that women with disabilities face more barriers in entering the labor market and employment opportunities need to be increased. Employment of ex-convicts and individuals injured in the fight against terrorism is very limited. While no placements in this category were recorded in Bursa, a total of 168 people were employed in this category in Türkiye. This situation points to the need to develop supportive policies in social cohesion and reintegration processes.

Table 24. Statistics on People with Disabilities

People with Disabled	Job Placement	Bursa	Türkiye
Number of Workplaces Obliged to Employ Disabled People	**Public**	36	1,433
	Private Sector	1,685	21,501
	Total	1,721	22,934
Number of Disabled People Currently Working	**Public**	802	22,449
	Private Sector	11,028	121,729
	Total	11,830	144,178
Number of Open Disability Quotas	**Public**	18	3,532
	Private Sector	267	21,370
	Total	285	24,902
Number of People with Disabilities Employed Above the Quota	**Public**	209	3,453
	Private Sector	1,014	10,407
	Total	1,223	13,860

According to the data on the number of workplaces, currently employed disabled people, open quotas and the distribution of disabled people working in excess of quotas in Bursa and Türkiye (Table 24), it is seen that the employment of disabled people is largely provided by the private sector, but there are still many unfilled open quotas. In Bursa, the total number of workplaces obliged to employ people with disabilities is 1,721, of which 36 belong to the public sector and 1,685 to the private sector. When the workplaces where disabled people are currently employed are analyzed, it is seen that a total of 11,830 disabled people are employed in Bursa. Of these, 802 are employed in the public sector and 11,028 in the private sector. A similar trend is observed in Türkiye in general, and it is noteworthy that employment of disabled people is mostly provided by the private sector. The total number of **"open vacancies"** allocated for the employment of people with disabilities but not filled is 285 in Bursa, of which 18 belong to the public sector and 267 to the private sector. In Türkiye, the total number of open vacancies is calculated as 24,902. These figures show that employers have not fully filled the quotas set for the employment of disabled people and that a significant number of disabled people can still be brought into the labor market.

However, there are also disabled people employed in some workplaces over quota. In Bursa, a total of 1,223 people are employed in this context, 209 of them in the public sector and 1,014 in the private sector. In Türkiye, a total of 13,860 people are employed over quota.

Table 25. Services Provided by ISKUR for Women

Employment Movements	Services	Bursa	Türkiye
Job Placement	**Public**	4	4,935
	Private	26,886	459,203
	Total	26,890	464,138
Active Labor Market Programs	**Vocational Training**	0	607
	On-the-Job Training	817	26,761
	Total	817	27,368
Individual Counseling Services	**Number of Interviews**	50,771	1,132,034

The services provided by ISKUR for women in Bursa and Türkiye are presented comparatively (Table 25). As of 2023, a total of 26,890 women were employed in Bursa, of which only 4 were employed in the public sector and 26,886 in the private sector. This indicates that women's employment is largely provided by the private sector and that employment opportunities for women in the public sector are quite limited. Vocational training and on-the-job training programs have an important place within the scope of active labor market policies to increase women's employment. While no women benefited from vocational training programs in Bursa, 817 women benefited from on-the-job training programs. In Türkiye, 607 women benefited from vocational training programs and 26,761 women benefited from on-the-job training programs.

Individual counseling services for women also provide important support for labor market participation. In Bursa, 50,771 women participated in individual job counseling sessions. In Türkiye, this number was recorded as 1,132,034. This data shows that women benefit extensively from guidance services in the process of entering the labor market.

Table 26. ISKUR's Services for Social Assistance Recipients

Employment Movements	Gender / Training	Bursa	Türkiye
Job Placement	**Male**	275	10,923
	Female	209	5,902
	Total	484	16,825
Active Labor Market Programs	**Vocational Training**	2	181
	On-the-Job Training	21	2,156
	Total	23	2,337

Employment and training services provided by ISKUR for social assistance recipients in Bursa and Türkiye are presented comparatively (Table 26). According to the data, a total of 484 people receiving social assistance were placed in jobs in Bursa, of which 275 were men and 209 were women. In Türkiye, this number is recorded as 16,825 people in total.

Vocational training and on-the-job training programs are very limited within the scope of active labor market programs implemented to bring individuals receiving social assistance into the workforce. In Bursa, only 21 people participated in on-the-job training programs and the number of people benefiting from vocational training programs remained at 2. In Türkiye, 181 people benefited from vocational training programs and 2,156 people benefited from on-the-job training programs.

Table 27. Unemployment Insurance Activities

Activities	Appropriation Status	Bursa	Türkiye
Application for Unemployment Benefits		78,083	1,614,184
Number of Beneficiaries	**Unemployment Allowance Withheld**	14,309	247,973
	Unemployment Allowance Ended	10,262	184,034
	Ongoing Payment	17,216	302,839

A total of 78,083 people applied for unemployment allowance in Bursa, compared to 1,614,184 in Türkiye as a whole. When the number of people entitled to unemployment benefit is analyzed, it is seen that 14,309 people were entitled to unemployment benefit in Bursa. In Türkiye as a whole, this number is calculated as 247,973. In terms of individuals whose unemployment benefits are ongoing, 17,216 people in Bursa continue to receive unemployment benefits, while 10,262 people's unemployment benefits have ended. In Türkiye as a whole, these figures are recorded as 302,839 people whose payments are ongoing and 184,034 people whose payments have ended (Table 27).

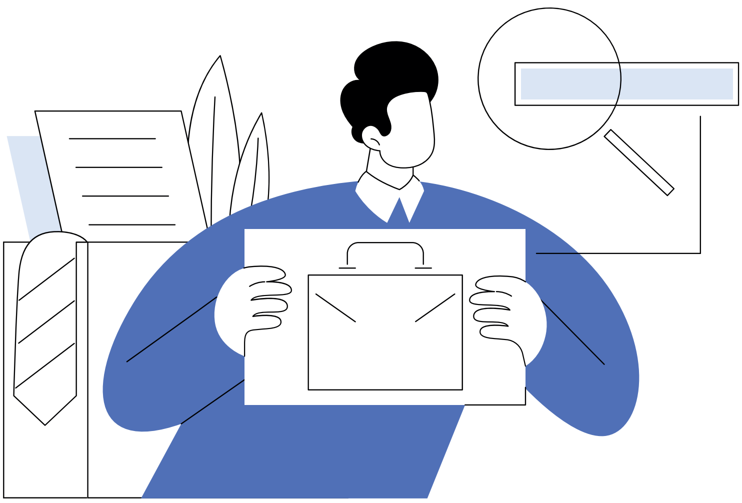

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Table 28. Unemployment Allowance Claimants by Age Groups

Age Ranges	Gender	Bursa	Türkiye
15-24	**Male**	1,746	32,249
	Female	1,376	22,647
	Total	3,122	54,896
25-29	**Male**	4,516	79,901
	Female	3,639	62,404
	Total	8,155	142,305
30-34	**Male**	4,974	91,156
	Female	3,422	56,978
	Total	8,396	148,134
35-39	**Male**	4,694	89,522
	Female	3,097	50,113
	Total	7,791	139,635
40-44	**Male**	4,208	78,183
	Female	3,017	47,259
	Total	7,225	125,442
45-49	**Male**	1,841	37,126
	Female	2,074	32,460
	Total	3,915	69,586
50-54	**Male**	861	17,185
	Female	1,247	18,480
	Total	2,108	35,665
55-59	**Male**	338	7,371
	Female	492	7,937
	Total	830	15,308
60-64	**Male**	95	1,489
	Female	106	1,617
	Total	201	3,106
65+	**Male**	28	370
	Female	16	399
	Total	44	769
Total	**Male**	23,301	434,552
	Female	18,486	300,294
	Total	41,787	734,846

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In Bursa, a total of 41,787 individuals were entitled to unemployment benefits, of which 23,301 were male and 18,486 were female. This indicates that men have a higher share in unemployment benefit applications and entitlement rates compared to women. In Türkiye as a whole, this number is calculated as 734,846. When analyzed by age groups, it is seen that the highest number of unemployment benefit claimants is concentrated in the 25-34 age group. In Bursa, 8,155 people in the 25-29 age group and 8,396 people in the 30-34 age group were entitled to unemployment benefits. In the 35-39 age group, this number is calculated as 7,791. These data show that young and middle-aged individuals are more likely to experience job loss in the labor market and that this age group constitutes the most dynamic segment of the active labor force. It is noteworthy that there is a significant decline in the number of individuals claiming unemployment allowance with increasing age (Table 28)

An analysis by gender reveals that women are less likely to receive unemployment benefits than men. This difference becomes more pronounced especially for women aged 30 and above. In Türkiye as a whole, a similar trend is observed and it is noteworthy that women benefit less from the unemployment insurance mechanism compared to men.

Table 29. Unemployment Allowance Beneficiaries According to Educational Background by Provinces

Education Status	Gender	Bursa	Türkiye
Illiterate	**Male**	110	3,390
	Female	133	3,476
	Total	243	6,866
Literate (no formal education completed)	**Male**	263	9,005
	Female	243	7,417
	Total	506	16,422
Primary Education	**Male**	9,715	183,297
	Female	7,200	99,356
	Total	16,915	282,653
Secondary Education	**Male**	8,486	147,556
	Female	5,106	83,452
	Total	13,592	231,008
Associate Degree	**Male**	1,737	33,978
	Female	2,248	43,329
	Total	3,985	77,307
Bachelor's Degree	**Male**	2,839	53,554
	Female	3,409	59,102
	Total	6,248	112,656
Master's Degree	**Male**	143	3,629
	Female	143	4,043
	Total	286	7,672
PhD	**Male**	8	143
	Female	4	119
	Total	12	262
Total	**Male**	23,301	434,552
	Female	18,486	300,294
	Total	41,787	734,846

The largest group of individuals entitled to unemployment benefits in Bursa are primary education graduates, totaling 16,915 people. Secondary education graduates are in second place with 13,592 people. A similar trend is observed across Türkiye, with the majority of those claiming unemployment benefits being individuals with low and middle education levels. The proportion of associate's and bachelor's degree graduates claiming unemployment benefits is also noteworthy. In Bursa, 3,985 associate degree graduates and 6,248 bachelor's degree graduates were entitled to unemployment benefits. These rates are similar across Türkiye (Table 29).

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

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
Bursa	**0**	**0**	**0**	**0**	**0**	**0**	**1,330**	**817**	**2,147**	**1,330**	**817**	**2,147**
Illiterate	0	0	0	0	0	0	0	0	0	0	0	0
Literate	0	0	0	0	0	0	3	3	6	3	3	6
Primary Education	0	0	0	0	0	0	205	204	409	205	204	409
Secondary Education (High School and Equivalent)	0	0	0	0	0	0	851	383	1.234	851	383	1.234
Associate Degree	0	0	0	0	0	0	184	134	318	184	134	318
Bachelor's Degree	0	0	0	0	0	0	86	91	177	86	91	177
Master's Degree	0	0	0	0	0	0	1	2	3	1	2	3
PhD	0	0	0	0	0	0	0	0	0	0	0	0

While a total of 50,471 people benefited from these programs in Türkiye, this number was recorded as 2,147 in Bursa. In terms of participation in disability courses, no disability courses were organized in Bursa, while 134 people participated in these courses across Türkiye.

Within the scope of on-the-job training programs (IEP), a total of 2,147 people participated in the program in Bursa, of which 1,330 were male and 817 were female. When participation in the programs is analyzed according to educational attainment, the highest number of participants were secondary education graduates (1,234 people) and primary education graduates (409 people). The participation of associate's degree graduates in on-the-job training programs was limited to 318 people, while the participation of bachelor's degree graduates was recorded as only 177 people (Table 30).

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

Number of Interviews and Participants	Activities	Bursa	Türkiye
Number of Individual Interviews	Business Consultancy	123,937	2,721,841
	Vocational Counseling	1,098	44,143
	Workplace Visit	33,266	695,536
	School Visit	191	9,185
Number of Work Club Participants	Group Interview Availability	24,198	897,525
	Male	587	18,708
	Female	882	32,917
	Total	1,469	51,625

Individual job counseling services are widely available in Bursa and a total of 123,937 individual interviews were conducted. This indicates that guidance services for jobseekers are actively carried out in Bursa and access to counseling services is high. In Türkiye, this number was recorded as 2,721,841. In terms of vocational counseling services, only 1,098 individual interviews were conducted in Bursa, compared to 44,143 in Türkiye. In Bursa, a total of 33,266 visits were made to workplaces, compared to 695,536 in Türkiye. School visits totaled 191 in Bursa and 9,185 in Türkiye (Table 31).

In terms of group interview availability, 24,198 people in Bursa benefited from these services. In Türkiye, this number was recorded as 897,525. In terms of participation in job club activities, a total of 1,469 people in Bursa participated in job club activities. In Türkiye, this number was recorded as 51,625. Women's participation in job club activities is higher than men's, with 882 women and 587 men participating in these activities in Bursa. This indicates hat women are more interested in guidance and support mechanisms in the job search process.

Table 32. Individual Interview by Disability, Gender and Education Status

Individual Interview	Gender	Bursa	Türkiye
Total Number of Interviews	**Male**	74,264	1,633,950
	Female	50,771	1,132,034
	Total	125,035	2,765.984
Young (15-24)	**Male**	19,648	394,701
	Female	13,725	272,298
	Total	33,373	666,999
Disabled	**Male**	8,247	213,143
	Female	2,501	55,286
	Total	10,748	268,429
Higher Education	**Male**	10,043	216,101
	Female	10,603	241,861
	Total	20,646	457,962

According to (Table 32), a total of 125,035 individual job counseling interviews were conducted in Bursa, 74,264 of which were with men and 50,771 of which were with women. For the young (15-24 years old) population, 33,373 counseling interviews were conducted in Bursa, of which 19,648 were with men and 13,725 with women. In Türkiye, a total of 666,999 young people benefited from this service.

In terms of people with disabilities, a total of 10,748 individual interviews were conducted in Bursa, the majority of which (8,247) were conducted with men. The number of interviews conducted with women disabled individuals is quite low (2,501). As for the individual interviews conducted for higher education graduates, a total of 20,646 people in Bursa benefited from this service. It is observed that female higher education graduates (10,603) participated in individual interviews more than males (10,043).

Table 33. Number of Individual Interviews by Gender and Level of Education

Education Level	Gender	Bursa	Türkiye
Illiterate	**Male**	104	3,933
	Female	96	7,125
	Total	200	11,058
Literate (no formal education completed)	**Male**	393	19,061
	Female	308	23,745
	Total	701	42,806
Primary Education	**Male**	33,436	756,975
	Female	21,444	465,798
	Total	54,880	1,222,773
Secondary Education	**Male**	30,288	637,880
	Female	18,320	393,505
	Total	48,608	1,031,385
Associate Degree	**Male**	4,373	107,403
	Female	5,104	130,588
	Total	9,477	237,991
Bachelor's Degree	**Male**	5,449	103,958
	Female	5,304	106,611
	Total	10,753	210,569
Master's Degree	**Male**	206	4,507
	Female	189	4,495
	Total	395	9,002
PhD	**Male**	15	233
	Female	6	167
	Total	21	400
Total	**Male**	74,264	1,633,950
	Female	50,771	1,132,034
	Total	125,035	2,765,984

According to the data on the distribution of individual job counseling interviews by education level in Bursa and Türkiye (Table 33), the highest participation in individual counseling interviews was among primary and secondary education graduates. A total of 125,035 individual interviews were conducted in Bursa, most of which were conducted with individuals with low and middle education levels. Primary education graduates constitute the largest group with 54,880 individual interviews, while secondary education graduates rank second with 48,608 interviews. Associate's and bachelor's degree graduates conducted 9,477 and 10,753 interviews, respectively. Master's degree graduates conducted 395 individual interviews, while doctorate graduates conducted only 21 individual interviews.

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

Employment Status	Gender	Bursa	Türkiye
Open Job Postings	**Total**	134,759	2,677,006
Job Placement	**Male**	39,492	772,888
	Female	26,890	464,138
	Total	66,382	1,237,026
Registered Unemployed	**Male**	46,519	1,198,172
	Female	47,970	1,222,279
	Total	94,489	2,420,451

The distribution of job vacancies, job placements and registered unemployed in Bursa and Türkiye are presented comparatively (Table 34). According to the data, there are 134,759 job vacancies in Bursa, while this number is 2,677,006 in Türkiye. This indicates that employment opportunities in Bursa are more limited compared to the Türkiye average. When job placement data is analyzed, a total of 66,382 people were employed in Bursa, of which 39,492 were male and 26,890 were female. In Türkiye as a whole, 1,237,026 people were placed in employment, with a higher number of males than females. In terms of the number of registered unemployed, there are 94,489 unemployed in Bursa. Of these, 46,519 are male and 47,970 are female. In Türkiye, there are a total of 2,420,451 registered unemployed.

2.2.3 TURKSTAT Domestic and International Migration Statistics

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

Migration Status	Türkiye	Bursa
Total Population	85,372,377	3,214,571
Immigration	3,450,953	95,935
Emigration	3,450,953	89,763
Net Migration	0	6,172
Net Migration Rate	0	1,9

Bursa is a city with net migration and as of 2023, 95,935 people migrated while 89,763 people emigrated. This indicates that Bursa has gained a net gain of 6,172 people and its net migration rate is calculated as 1.9%. The total migration movement in Türkiye is calculated as 3,450,953 people, and migration movements in Bursa reflect the impact of regional economic dynamics (Table 35).

Table 36. Reasons for Migration to Bursa, 2023

Reason for Migration	Türkiye	Bursa
Total	3,450,953	95,935
Job Transfer / Change of Workplace	320,142	9,016
Starting a Job / Employment Opportunity	285,825	10,849
Education	512,011	11,418
Marital Status Change / Family Reasons	152,046	5,971
Better Housing and Living Conditions	518,016	14,395
Migration Dependent on a Household/Family Member	601,481	18,082
Returning to Homestay/Hometown	99,975	775
Health / Care	19,450	535
Purchase of Housing	95,570	2,464
Retirement / Pension	49,890	997
Natural Disaster / Emergency Situations	499,363	11,697
Other	103,547	1,042
Unknown / Not Specified	193,637	8,694

According to the data on reasons for migration in Bursa and Türkiye (Table 36), Bursa is a city of migration and the reasons for migration are diverse. As of 2023, a total of 95,935 people migrated to Bursa and the most common reasons for migration are family dependency (18,082 people), better housing and living conditions (14,395 people) and education (11,418 people). Among labor-related reasons, factors such as starting / finding a job (10,849 people) and transfer / job change (9,016 people) show the impact of the labor market in Bursa on migration movements.

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

Reason for Migration	Türkiye	Bursa
Total	3,450,953	89,763
Transfer / Job Change	320,142	8,117
Starting a Job / Finding a Job	285,825	7,709
Education	512,011	19,552
Change of Marital Status / Family Reasons	152,046	5,062
Better Housing and Living Conditions	518,016	14,723
Migration Dependent on a Household/Family Member	601,481	16,300
Returning to Homestay/Hometown	99,975	3,302
Health / Care	19,450	467
Buying a House	95,570	2,068
Pension	49,890	1,457
Natural Disaster / Emergency	499,363	413
Other	103,547	3,265
Unknown	193,637	7,328

A total of 89,763 people migrated from Bursa in 2023, with the most common reasons being education (19,552 people), family dependency (16,300 people) and better housing and living conditions (14,723 people). In terms of labor-related reasons, starting / finding a job (7,709 people) and transfer / job change (8,117 people) are among the important factors (Table 37).

Table 38. Incoming and Outgoing Migration by Gender, 2023

Migration Status	Gender	Türkiye	Bursa
Total Population		85,372,377	3,214,571
Immigration	**Total**	316,456	13,827
	Male	171,395	7,223
	Female	145,061	6,604
Emigration	**Total**	714,579	18,495
	Male	394,186	10,324
	Female	320,393	8,171
Net Migration		-398,123	-4,668

The gender-based distribution of migration movements in Bursa and Türkiye is presented comparatively (Table 38). According to the data, Bursa received 13,827 migrants, emigrated 18,495 people and experienced a net migration loss of 4,668 people. This situation reveals that Bursa is among the provinces with net migration. In terms of gender, 7,223 of those who came to Bursa were male and 6,604 were female, while 10,324 of those who left Bursa were male and 8,171 were female. The fact that the migration rate of men is higher than that of women shows the impact of labor mobility on migration.

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 Scope	Bursa	Türkiye
Social Security Coverage		3,198,568	34,250,646
Active Insured	**4/1-A**	831,266	9,058,412
	4/1-B	117,740	1,341,932
	4/1-C	96,520	1,109,918
	Toplam	1,045,526	11,510,262
Income and Monthly Recipients	**4/1-A**	537,106	4,861,607
	4/1-B	98,325	871,024
	4/1-C	79,468	839,401
	Toplam	714,899	6,572,032
Dependent	**4/1-A**	701,687	6,615,826
	4/1-B	325,501	3,860,196
	4/1-C	219,064	2,480,636
	Toplam	1,246,252	12,956,658
Social Security Coverage, 4/1-A		2,070,059	20,535,845
Social Security Coverage, 4/1-B		541,566	6,073,152
Social Security Coverage, 4/1-C		395,052	4,429,955
Those Registered under General Health Insurance		191,891	3,211,694

As of 2023, a total of 3,198,568 people in Bursa are covered by social security, of which 1,045,526 are actively insured, 714,899 are retired or pensioners, and 1,246,252 are dependents. Within the scope of General Health Insurance (GHI), 191,891 people are registered, which provides access to health services for individuals without social security (Table 39).

As regards the distribution of active insured people, the largest group is composed of private sector employees (4/1-A) with 831,266 people. There are 117,740 people under BAG-KUR (4/1-B) and 96,520 people under public sector employees (4/1-C). In terms of pensioners, a total of 714,899 people in Bursa receive pension within the scope of social security. In terms of dependents, 1,246,252 people in Bursa benefit from social security services through an insured individual. The fact that the number of individuals registered under General Health Insurance is 191,891 shows the need for access to health services for individuals without social security.

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

SSI Status	SSI Scope	Gender	Bursa	Türkiye
4/1-A Compulsory Insured		**Male**	481,657	5,260,477
		Female	272,279	2,864,073
		Total	753,936	8,124,550
4/1-B Compulsory Insured	**Compulsory (Except Agriculture)**	**Male**	73,747	900,069
		Female	25,048	265,494
		Total	98,795	1,165,563
	Mukhtar	**Male**	317	3,335
		Female	26	222
		Total	343	3,557
	Agriculture Compulsory	**Male**	8,546	82,086
		Female	2,637	20,707
		Total	11,183	102,793
	Total 4/1-B Compulsory Insured	**Male**	82,610	985,490
		Female	27,711	286,423
		Total	110,321	1,271,913
4/1-C Compulsory Insured		**Male**	53,037	632,128
		Female	43,482	477,592
		Total	96,519	1,109,720
Total Number of Compulsory Insured			564,693	10,506,183

As of 2023, there are 564,693 compulsory insured people in Bursa, with the largest group being private sector workers under 4/1-A. Analyzed by gender, there are 753,936 people insured under 4/1-A in Bursa, of which 481,657 are men and 272,279 are women. This indicates that male employment in the private sector is higher than female employment. A total of 110,321 people are insured under BAG-KUR (4/1-B), of which 82,610 are male and 27,711 are female. It is observed that men are more dominant among small business owners and independent workers. In the agricultural sector, 11,183 people are insured and the proportion of women is quite low. A total of 96,519 people are employed in the public sector (4/1-C), of whom 53,037 are men and 43,482 are women. Although the female employment rate in the public sector is more balanced than in the private sector, it is noteworthy that men outnumber women (Table 40).

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

4/1-A Scope	Employment Type and Sector	Bursa	Türkiye
Workplace	**Permanent**	86,694	1,992,551
	Temporary	6,068	186,572
	Public	977	46,660
	Private Sector	91,785	2,132,463
	Total	92,762	2,179,123
Compulsory Insured	**Permanent**	690,004	14,064,318
	Temporary	63,932	2,342,102
	Public	35,683	1,936,402
	Private Sector	718,253	14,470,018
	Male	481,657	10,871,438
	Female	272,279	5,534,982
	Total	753,936	16,406,420
Average Daily Earnings (TRY)	**Permanent**	781,16	820,17
	Temporary	617,11	644,8
	Public	961,55	1.028,11
	Private Sector	759,2	764,15
	Male	826,89	835,75
	Female	665,58	723,47
	Total	769,14	797,99

As of 2023, Bursa has a total of 92,762 workplaces, of which 91,785 belong to the private sector and 977 to the public sector. In terms of the number of employees with compulsory insurance, 753,936 people are insured in Bursa. Of these, 690,004 have permanent status and 63,932 have temporary status. When analyzed by gender, 481,657 are male and 272,279 are female. This indicates that the labor force participation of men is higher than that of women (Table 41).

When average daily earnings are analyzed, it is seen that the average daily income of male employees in Bursa is 826.89 TL, while that of female employees is 665.58 TL. This difference shows that gender-based wage inequality persists. On a sectoral basis, public sector employees earn 961.55 TL, while private sector employees earn 759.20 TL. The earnings of public sector employees are significantly higher than those of private sector employees. Overall, the private sector accounts for the majority of employment in the labor market in Bursa, while the public sector offers fewer jobs but higher wages. Women's labor force participation remains low compared to men and the wage gap persists.

Table 42. General SSI Data Specific to Bursa, 2023

Indicator	2024.01	2024.02	2024.03	2024.04	2024.05	2024.06	2024.07	2024.08	2024.09
Insured, Active, Total (4a, 4b, 4c)	1036417	1036296	1030634	1023314	1033249	1027161	1007011	1045253	1037083
Insured, Active, Total (4a)	822094	822945	816693	809924	819910	814205	798868	792911	830585
Insured, Active, Total (4b)	117121	115919	116524	116063	116233	115739	116115	116313	117353
Insured, Active, Total (4b) (Excluding Agriculture)	106135	105075	108763	108403	105612	105214	108592	105816	106852
Insured, Active, Total (4b) (Agriculture)	10986	10844	10761	10660	10621	10525	10523	10497	10538
Insured, Active, Total (4c)	97202	97432	97417	97327	97206	97217	97540	97787	98955
Insured, Active, Compulsory Insured (4a)	747351	747846	742953	735839	746254	738420	748195	744256	748696
Insured, Active, Compulsory Insured (4b)	109712	108495	109127	108737	108896	108645	109060	109223	109558

Table 42. General SSI Data Specific to Bursa, 2023

Indicator	2024.01	2024.02	2024.03	2024.04	2024.05	2024.06	2024.07	2024.08	2024.09
Insured, Active, Compulsory Insured (4b) (Except Agriculture and Mukhtar)	98384	97311	98030	97684	97884	97730	98157	98347	98687
Insured, Active, Compulsory Insured (4b) (Agriculture)	10986	10844	10761	10660	10621	10525	10523	10497	10538
Insured, Active, Compulsory Insured (4c)	97201	97431	97416	97326	97205	97216	97539	97786	98954
Insured, Active, Agricultural Insured (2925 S.K.) (4a)	819	805	743	762	737	735	773	773	771
Insured, Active, Apprentice (4a)	19984	20695	20211	20242	20294	18507	8557	9138	20080
Insured, Active, Interns and Trainees (4a)	48018	47768	47067	47380	46852	50403	35716	33040	55231
Insured, Active, Mukhtar (4b)	342	340	336	393	391	390	380	379	363
Insured, Active, Other Insured (4a)	5922	5831	5719	5701	5698	6138	5665	5707	5794
Insured, Active, Other Insured (4c)	1	1	1	1	1	1	1	1	1
Insured, Active, Optional Insured (4b)	7409	7424	7397	7326	7337	7094	7085	7090	7170
Insured, Active, Optional Insured (4b) (Excluding Agriculture)	7409	7424	7397	7326	7337	7094	7085	7090	7170
Insured, Active, Optional Insured (4b) (Agriculture)	0	0	0	0	0	0	0	0	0

“An examination of average daily earnings reveals that in Bursa, the average daily income of male employees is 826,89 TL, while that of female employees is 665,58 TL. This disparity indicates that gender-based wage inequality persists.”

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It presents a comparative analysis of the changes in the number of insured active employees in Bursa through 2024 (Table 42). When the general trend is analyzed:

- The total number of insured employees (4a, 4b, 4c) fluctuates throughout the year.
- 4a insured employees (workers) constitute the largest group and show relatively more variability.
- Insured people under 4b (BAG-KUR) follow a more stable course, showing small fluctuations throughout the year.
- Insured people covered by 4c (public employees) have the least variation and remain relatively stable throughout the year.

These fluctuations may be related to seasonal employment changes, economic conditions and mobility in informal employment. In particular, the fluctuation in 4a may have been shaped by employment changes in the industrial and service sectors.

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

Table 43. Gender Breakdown of Work Permits Issued to Foreigners

Province	Bursa	Türkiye
Female	1,517	33,449
Male	15,722	107,031
Total	17,239	140,480

A total of 17,239 foreigners were granted work permits in Bursa, which is 12.3% of the 140,480 work permits in Türkiye (Table 43). When analyzed by gender, the number of work permits issued to male foreigners in Bursa is significantly higher (15,722) compared to female foreigners (1,517). A similar trend is observed across Türkiye, where the share of male foreign workers in the total is quite high (76.2% male, 23.8% female).

2.4 Data from the Presidency of Migration Management

Migration movements in Türkiye have different dynamics in terms of migrants with residence permits and migrants under temporary protection. As of February 27, 2025, 1,072,713 foreigners live in Türkiye with a residence permit. When the distribution of this foreign population by provinces is analyzed, Bursa ranks high with 48,169 foreigners. This indicates that Bursa is among the large provinces receiving migration and that foreigners prefer to live here for certain reasons.

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Table 44. Distribution of Foreigners in Türkiye with Residence Permit 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
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

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

Province Order	Province	Total Number of Foreigners	Province Order	Province	Total Number of Foreigners
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			

A total of 1,072,713 foreigners live in Türkiye with a residence permit and Bursa ranks 4th after Istanbul, Antalya and Ankara with 48,169 foreigners. Bursa's share in the total foreign population living in Türkiye with a residence permit is significant and corresponds to 5% of the total foreign population (Table 44).

Table 45. Distribution of Syrians under Temporary Protection

Province Order	Provinces	SuTPs	Province Population	Total Number of People Living in the Province	SuTPs 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%
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%

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Table 45. Distribution of Syrians under Temporary Protection

Province Order	Provinces	SuTPs	Province Population	Total Number of People Living in the Province	SuTPs Rate
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%
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%

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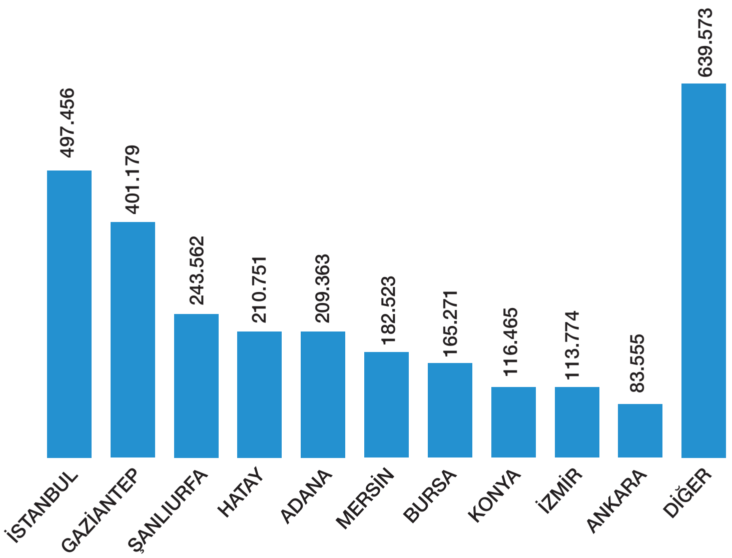
Table 45. Distribution of Syrians under Temporary Protection

Province Order	Provinces	SuTPs	Province Population	Total Number of People Living in the Province	SuTPs Rate
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%
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%

There are 162,928 SuTPs in Bursa, which corresponds to approximately 5.78% of the total population of 2,820,362 SuTPs in Türkiye (Graphic 2). This data shows that Bursa is one of the cities hosting the highest number of Syrians in Türkiye. Bursa is among the top 10 cities in Türkiye in terms of Syrian population. While cities such as Istanbul, Gaziantep, Şanlıurfa and Hatay have higher Syrian populations, the proportion of Syrian population in Bursa is quite remarkable. These data show that Bursa has become an important center for temporary migration and migration policies should be shaped accordingly.

In this section, official statistics and secondary data statistic on the demographic, socio-economic and sectoral structure of Bursa are evaluated. In order to support these findings, the results of the survey conducted in the next section will be analyzed.

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



*30.01.2025 as of the date

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2.5 Highlighted Findings in the Analysis of Secondary Data

Population and Demographic Structure

- As of 2023, Bursa's population reached 3,214,571, an increase of 6.2% compared to the previous year. This rate is well above 's overall population growth of 1.1%.
- Bursa's population density is 310 people per km², which is nearly three times the Turkish average of 111.
- The median age is 35.9 years. While this value is 36.6 for women, it is calculated as 35.1 for men. Compared to 's average of 34, Bursa's population is slightly older.
- Gender distribution is balanced: 1,605,941 males and 1,608,630 females.

Labor Force and Employment Statistic

- Bursa's unemployment rate of 8.3% is below the average for (9.4%).
- The employment rate is 51.3%, exceeding the 48.3% rate in .
- The labor force participation rate is 56.0%, above the average for (53.3%).
- According to ISKUR data, there are 134,759 job vacancies in Bursa.
- The number of people placed in jobs is 66,382 and the number of registered unemployed is 94,489.
- Of those placed in jobs through ISKUR, 60% are men and 40% are women. It is observed that especially the young population has difficulties in the process of participation in employment.

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Migration Movements and Social Security

- In 2023, Bursa was a city of net migration. While 95,935 people migrated to the city, 89,763 people left the city; thus, the net migration rate was calculated as 1.9%.
- The main reasons for migration were family dependency (18.8%), better living conditions (15.0%), education (11.9%) and starting/finding a job (11.3%).
- The total number of people covered by social security is 3,198,568.
- The number of active insured is 1,045,526, the majority of whom are private sector employees.
- Within the scope of General Health Insurance, 191,891 people are registered in the system.

Foreign Population and Work Permits

- The number of foreigners living in Bursa with a residence permit is 48,169. With this number, Bursa ranks 4th in.
- The number of SuTP Protection is 162,928,
- In Bursa, 17,239 foreigners were granted work permits. Of these, 15,722 are men and 1,517 are women.

Dynamics of the Labor Market

The distribution of insured people by gender is as follows:

- Private sector employees (4/1-A): Male 481,657, Female 272,279
- Self-employed (BAG-KUR - 4/1-B): Male 82,610, Female 27,711
- Public employees (4/1-C): Male 53,037, Female 43,482

CHAPTER III

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CHAPTER III

3. SURVEY ANALYSIS AND FINDINGS

3.1 Demographic Data

This research was conducted with a total of 60 participants in Bursa province. The majority of the participants were male and the largest age group was 25-34 years old. In terms of education level, it is seen that most of them have bachelor's degrees. In terms of working time in the organization, participants with 2-5 years of experience stand out, while the number of long-term employees is lower. In terms of organizations, most of the participants work for the Türk Kızılay, followed by public institutions and private sector representatives. In terms of position distribution, experts and consultants occupy an important place, while managers and employees in other positions are also represented.

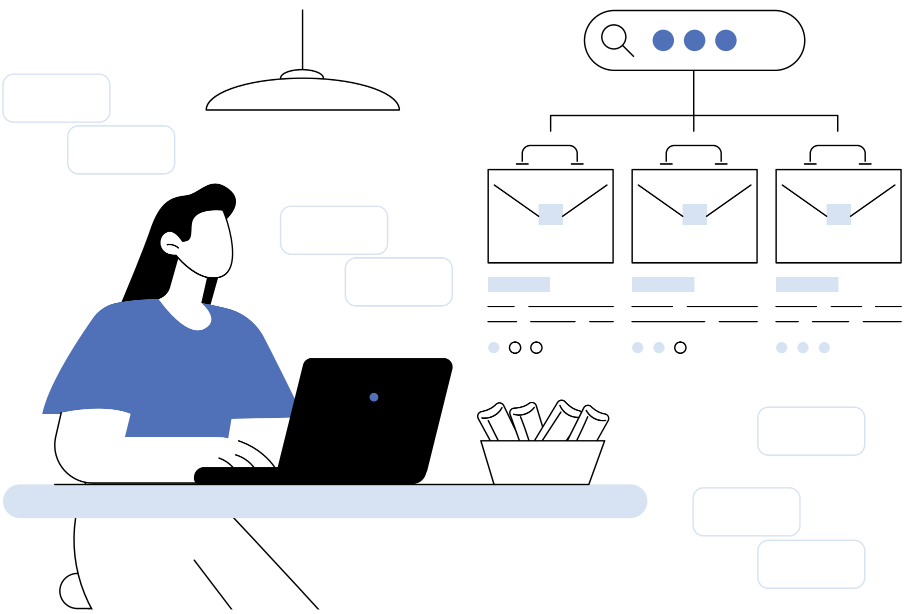
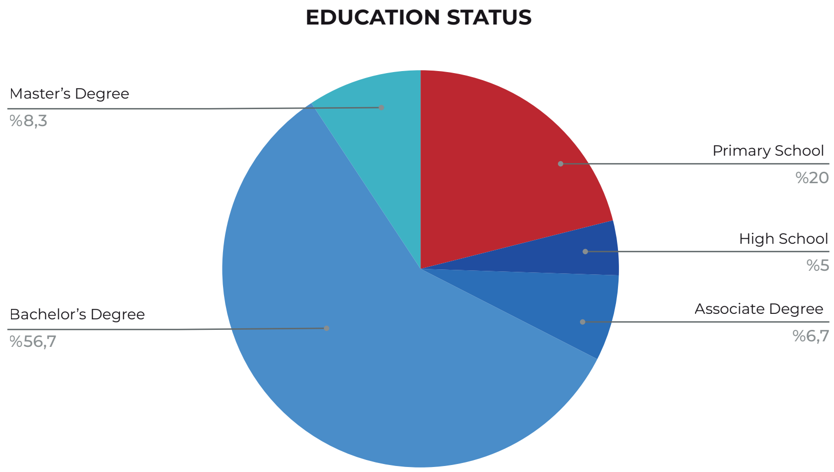


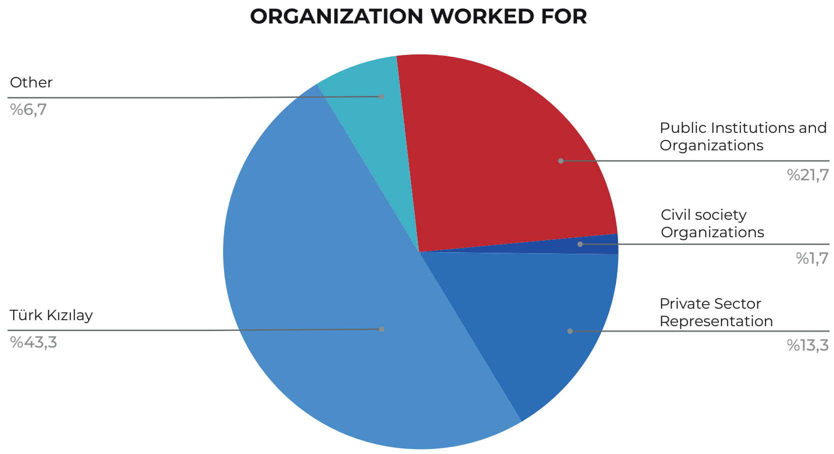
Table 46. Demographic Analysis of Bursa Participants

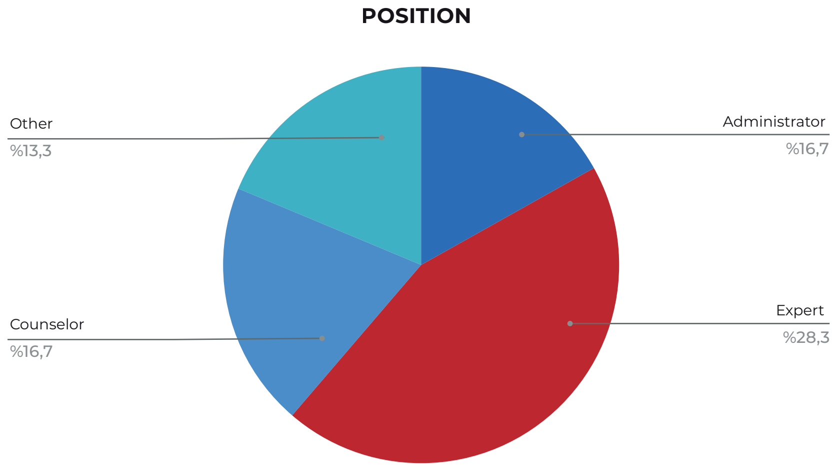
Demographic Information	Indicators	n	%
Gender	Female	20	33,3
	Male	38	63,3
Age	18-24	3	5,0
	25-34	23	38,3
	35-44	12	20,0
	45-54	8	13,3
	55 years and older	12	20,0
Education Status	Primary School	12	20,0
	High School	3	5,0
	Associate Degree	4	6,7
	Bachelor's Degree	34	56,7
	Master's Degree	5	8,3
Years of Employment in the Institution*	0-1 year	4	6,7
	2-5 years	23	38,3
	6-10 years	10	16,7
	11-15 years	14	23,3
	16 years and above	1	1,7
Type of Institution Employed	Public Institutions and Organiza-tions	13	21,7
	Civil	1	1,7
	Private Sector Representation	8	13,3
	Türk Kızılay	26	43,3
	Other	4	6,7
Position	Administrator	10	16,7
	Expert	17	28,3
	Counselor	10	16,7
	Other	8	13,3

Notes= n=60, 2 participants left blank their gender, age and educational status, 8 participants left blank their length of service and institution, 15 participants left blank their position in their institution.

Figure 3. Ratios of Bursa Respondents 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 Bursa, 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 statistic 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.

The majority of respondents observe that the demand for skilled labor has increased in certain sectors of the province's labor market. However, there is also a significant number of respondents who believe that economic difficulties have reduced job opportunities (Table 47).

Table 47. Labor Market Overview – Bursa

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	3	5,0
Skilled labor in specific sectors demand has increased.	25	41,7
Work due to economic difficulties, opportunities are diminished	17	28,3
There is a transition period in which new job demands are emerging and some sectors are in the process of development.	7	11,7
I don't have sufficient information to evaluate	3	5,0
Note= 5 participants did not respond.		

Respondents cited declining market demand, job shifts to other regions or countries, and technological advances leading to automation as the most influential factors in the decline or stagnation of employment. Aging infrastructure and lack of innovation in the sector, an aging workforce and reduced vocational training opportunities are also seen as important constraints to employment. In contrast, the transition to greener and more sustainable industries was not widely recognized as a factor negatively affecting employment (Table 48).

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

Question: To what extent do you agree that the following are reasons for the decline or stagnation in employment in your province?										
	Strongly Disagree		**Disagree**		**Moderately Agree**		**I Agree**		**Absolutely Agree**	
Expressions	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Technological developments leading to automation	-	-	8	13,3	34	56,7	17	28,3	1	1,7
Shifting or outsourcing of work to other regions or countries	-	-	5	8,3	38	62,7	11	18,3	6	10,0
Decline in market demand for goods or services	-	-	4	6,7	41	68,3	9	15,0	6	10,0
Transition to greener and more sustainable industries	5	8,3	43	71,6	8	13,3	1	1,7	3	5,0
Aging infrastructure or lack of innovation in the sector	-	-	4	6,7	32	53,3	17	28,3	7	11,7
Aging and unreplaced labor force	-	-	2	3,3	26	43,3	23	38,3	9	15,0
High demand exceeding local talent supply	-	-	15	25,0	28	46,7	11	18,3	6	10,0
Reduced opportunities for vocational training/ capacity building	-	-	2	3,3	27	45,0	19	31,7	12	20,0

3.3 Labor Demand and Qualified Personnel Shortage

BuIn order to understand the observations and opinions of the respondents on the labor demand and shortage of skilled personnel in Bursa, 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?", "In which sectors is there currently a shortage of skilled labor supply in your province?", "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. However, since the missing data rate was low in some tables, missing data analysis was not performed in these tables.

Respondents highlighted regional economic growth as the most important factor affecting labor demand in high-demand sectors (Table 49). In addition, increased technological integration in enterprises, changes in consumer behavior and demand for qualified professionals are also important. The emergence of new sectors, urbanization and infrastructure projects are also among the factors affecting labor demand, but respondents' assessments on these issues are more diverse. The impact of incentives was assessed at medium and high levels, indicating that government support can be a determinant in regional labor demand.

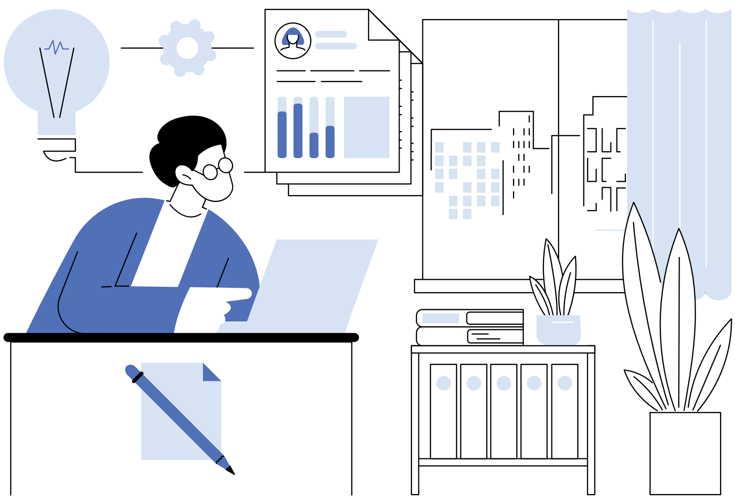

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Table 49. Importance of Factors Affecting Labor Demand in High Demand Sectors in Bursa

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

Factors	Very Insignificant		Unimportant		Moderately important		Important		Very important	
Evaluations	n	%	n	%	n	%	n	%	n	%
Regional economic growth	-	-	-	-	5	8,3	45	75,0	10	16,7
Increased technological integration in enterprises	-	-	4	6,7	24	40,0	21	35,0	11	18,3
Creation of new sectors that increase labor demand	-	-	9	15,0	28	46,7	15	25,0	8	13,3
Incentives	-	-	3	5,0	29	48,3	16	26,7	12	20,0
Growing demand for skilled professionals	-	-	5	8,3	16	26,7	22	36,7	17	28,3
Urbanization and infrastructure projects	-	-	9	15,0	31	51,7	10	16,7	10	16,7
Changes in consumer behavior or market needs	-	-	-	-	30	50,0	19	31,7	11	18,3

Manufacturing, agriculture and forestry are the sectors with the highest shortage of qualified labor supply in Bursa. In addition, wholesale and retail trade and repair of motor vehicles, professional, scientific and technical activities, culture, arts, entertainment and education sectors also have significant labor shortages. Sectors such as mining, construction and water supply also experience a certain level of supply shortage, while no labor shortage is reported for the information and communication sector. These data show that there is an ongoing need for skilled labor in the services sectors as well as the industrial and agricultural sectors in Bursa (Table 50).

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Table 50. Bursa 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	24
[2] Mining and Quarrying.	12
[3] Manufacturing	26
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution.	5
[5] Water Supply; Sewerage, Waste Management and Improvement Activities.	11
[6] Construction	12
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles.	18
[8] Transportation and Warehousing.	5
[9] Accommodation and Food Service Activities.	7
[10] Information and Communication.	0
[11] Finance and Insurance Activities.	2
[12] Professional, Scientific and Technical Activities.	15
[13] Administrative and Support Service Activities	5
[14] Education.	13
[15] Culture, Arts, Entertainment, Leisure and Sports	14
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	3
Notes = Respondents marked more than 1 in the sectors where there is a shortage of qualified labor supply in Bursa	

Low wages and poor working conditions, an aging and non-replacing workforce, and lack of education or training programs are among the most important reasons for the skilled labor shortage in Bursa. In addition, limited awareness of job opportunities and migration of skilled labor to other regions or countries are also important factors. Rapid technological advances and high demand exceeding the local supply of skills are seen as moderately influential. These results suggest that both structural and economic factors need to be taken into account for labor market sustainability (Table 51).

Table 51. Reasons for Bursa Skilled Labor Shortage

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	
Factors	n	%	n	%	n	%	n	%	n	%
Lack of relevant education or training programs	-	-	1	1,7	22	36,6	28	46,7	9	15,0
Migration of skilled labor to other regions or countries	1	1,7	1	1,7	37	61,7	18	30,0	3	5,0
Limited awareness of job opportunities	-	-	4	6,7	33	55,0	18	30,0	5	8,3
Rapid technological advances	-	-	12	20,0	33	55,0	12	20,0	3	5,0
Low wages or poor working conditions	-	-	1	1,7	2	3,3	39	65,0	18	30,0
Aging and unreplaced labor force	-	-	2	3,3	6	10,0	39	75,0	13	21,7
High demand exceeding local talent supply	3	5,0	5	8,3	31	51,7	12	20,0	9	15,0

According to participant views, it is seen that the skills gap is at medium and high levels in sectors such as manufacturing, agriculture, forestry and fishing, electricity-gas-steam and air conditioning production (Table 52). It can be said that the skills gap is more evenly distributed in sectors such as mining and quarrying, water supply and waste management, and construction. While the skills gap is generally assessed at low levels in accommodation, finance and insurance activities, the skills gap is felt less in sectors such as information and communication, culture-arts-entertainment. In general, the skills gap is perceived at higher levels in technical and production-oriented sectors, while it is perceived at relatively lower levels in service and knowledge-oriented sectors.

Table 52. Sectoral Skills and Talent Gaps in Bursa

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

Sectors	None		Quite a few		Moderate		Too much	
Factors	n	%	n	%	n	%	n	%
[1] Agriculture, Forestry and Fisheries	1	1,7	5	8,3	46	76,7	8	13,3
[2] Mining and Quarrying	9	15,0	29	48,3	17	28,3	5	8,3
[3] Manufacturing	-	-	3	5,0	36	60,0	21	35,0
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	2	3,3	9	15,0	34	56,7	15	25,0
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	2	3,3	26	43,3	22	36,7	10	16,7
[6] Construction	3	5,0	21	35,0	27	45,0	9	15,0
[7] Wholesale and Retail Trade; of Motor Vehicles and Motorcycles	1	1,7	5	8,3	43	71,7	11	18,3
[8] Transportation and	5	8,3	18	30,0	32	53,3	5	8,3
[9] Accommodation and Food Service	5	8,3	37	61,7	18	30,0	-	-
[10] Information and Communication	1	1,7	38	63,4	17	28,3	4	6,7
[11] Finance and Insurance	5	8,3	37	61,7	18	30,0	-	-
[12] Professional, Scientific and Technical	4	6,7	25	41,7	20	33,3	11	18,3
[13] Administrative and Support Service Activities	6	10,0	33	55,0	21	35,0	-	-
[14] Education	4	6,7	35	58,3	16	26,7	5	8,3
[15] Culture, Arts, Entertainment, Leisure and Sports	3	5,0	41	68,3	15	25,0	1	1,7
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	5	8,3	38	63,3	10	16,7	7	11,7

Respondents rated sector-specific training programs as highly effective or moderately effective, but only a small group considered this initiative as very ineffective or ineffective (Table 53). Collaboration between enterprises and educational institutions was rated by respondents as the highest impact initiative, with the majority finding it effective or very effective. Enhanced career counseling and guidance in schools was generally rated as moderately effective and impactful, although some respondents saw the impact of this initiative as low. In general, respondents consider cooperation between enterprises and educational institutions to be the most effective solution, while opinions on other initiatives are more diverse.

Table 53. Impact of Enterprises on Closing the Talent and Skill Gap in Bursa

Question: How effective do you think the following initiatives will be in closing the skills and talent gap in your province?										
	Highly ineffective		**Ineffective**		**Moderately Effective**		**Effective**		**Very Effective**	
Initiatives	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Sector-specific training programs	1	1,7	3	5,0	27	45,0	23	38,3	6	10,0
Cooperation between businesses and educational institutions	1	1,7	-	-	5	8,3	41	68,3	13	21,7
Enhanced career counseling and guidance in schools	1	1,7	5	8,3	24	40,0	18	30,0	12	20,0

3.4 Migrant Workers and Employment of People with Disabilities

In order to understand the observations and opinions of the participants on the employment of migrant workers and people with disabilities in Bursa, we asked them to answer questions such as **"What is your general perception of the employment of migrant workers in your institution or province?", "To what extent do the following factors affect the 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 institutions in your province?", "To what extent do the institutions in your province experience the following difficulties encountered 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.

Respondents were generally neutral regarding the employment of migrant workers in their organizations or provinces (Table 54). The majority expressed neither a positive nor a negative opinion on this issue. While there is a group of respondents who have a positive view on the employment of migrant workers, the number of respondents who have a very positive view is smaller. On the other hand, there is also a group of respondents who have a negative view of migrant labor. This reveals that the majority of the participants do not have a clear attitude towards migrant labor employment, but there is still an audience with different perspectives.

Table 54. General Perception of Migrant Labor Employment in Bursa

Question: General Perception of Migrant Labor Employment in Bursa		
Answers	**n**	**%**
Strongly Positive	8	13,3
Positive	14	23,3
Neither Positive nor Negative	31	51,7
Negative	7	11,7
Strongly Negative	-	-

Respondents rated the factors influencing decisions to employ migrant workers in their province as having varying degrees of influence (Table 55). Lower labor costs were seen as the most influential factor by respondents, with a large proportion indicating that it was **"influential"** or **"very influential".** The availability of skills that are not available locally was also highlighted as an important factor, with the majority of respondents stating that it was **"influential"** or **"very influential"**.

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

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	-	-	6	10,0	19	31,6	24	40,0	11	18,4
Lower labor costs	-	-	-	-	4	6,7	30	50,0	26	43,3
High work ethics and reliability	3	5,0	24	40,0	24	40,0	6	10,0	3	5,0
Flexibility in work schedules	-	-	7	11,7	30	50,0	20	33,3	3	5,0
Diversity and inclusion initiatives	1	1,7	5	8,3	35	58,3	15	25,0	4	6,7
Ease of filling vacancies quickly	-	-	2	3,3	12	20,0	22	36,7	24	40,0
Concerns about cultural or language differences	-	-	3	5,0	38	63,3	17	28,3	2	3,3

Respondents were generally neutral when assessing the impact of employing migrant workers on organizations (Table 56). In terms of team dynamics and cooperation, the majority felt that this factor had neither a positive nor a negative impact. On productivity levels, the majority of respondents also observed a neutral impact. Similarly, on innovation and creativity, the majority of respondents did not see any significant impact. On workplace culture, again the majority felt that migrant workers had a neutral impact on culture. These results suggest that the effects of migrant labor are mostly perceived in a neutral way by the respondents.

Table 56. The Impact of Employing Migrant Workers on Institutions in Bursa

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	1	1,7	11	18,3	27	45,0	18	30,0	3	5,0
Productivity Levels	1	1,7	-	-	41	68,3	15	25,0	3	5,0
Innovation and Creativity	2	3,3	5	8,3	39	65,0	14	23,3	-	-
Workplace Culture	1	1,7	9	15,0	36	60,0	10	16,7	4	6,7

Respondents reported that language or communication barriers and cultural adaptation problems were the most common challenges in the employment of migrant workers (Table 57). Legal compliance issues were also cited as a significant challenge, but generally at a moderate level. Integration with local staff and filling vacancies quickly were observed to be less of a challenge. This suggests that the main challenges in migrant labor recruitment are related to communication and cultural adaptation.

Table 57. Challenges Faced by Institutions Employing Migrant Workers in Bursa

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	1,7	-	-	29	48,3	28	46,7	2	3,3
Cultural adaptation issues	1	1,7	1	1,7	36	60,0	17	28,3	5	8,3
Legal or regulatory compliance	1	1,7	1	1,7	40	66,6	16	26,7	2	3,3
Costs related to recruitment or training	6	10,0	6	10,0	33	55,0	11	18,3	4	6,7
Workplace integration with local staff	1	1,7	6	10,0	45	75,0	6	10,0	2	3,3
Ease of filling vacancies quickly	5	8,3	8	13,3	35	58,3	3	5,0	9	15,0
Concerns about cultural or language differences	1	1,7	5	8,3	36	60,0	11	18,3	7	11,7

Respondents consider **"legal legislation"** to be the biggest challenge in the recruitment process of migrant workers (Table 58).

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	6	10,0
Legislation	40	66,6
Recruitment and training	7	11,7
Integrating them into workplace culture	7	11,7

Respondents indicated that provincial institutions generally have limited policies in place to address the challenges they face in recruiting migrant workers (Table 59). For the most part, there was a high proportion of respondents who indicated that there were no specific policies or that existing policies were very limited.

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

Question: What is your view on the existence of specific policies or strategies by organizations in your province to address challenges in recruiting migrant workers?		
Answers	**n**	**%**
Yes, they have comprehensive policies.	4	6,7
Yes, but the policies are quite limited.	32	53,3
No, they don't have a specific policy.	24	40,0

Participants generally have a neutral view on the employment of people with disabilities in Bursa institutions (Table 60). The majority evaluated this situation as **"neither positive nor negative"**. While some of them evaluated the employment of people with disabilities positively, some participants expressed negative opinions. No **"Strongly negative"** opinion was expressed. This result may indicate that there is a need for more awareness and policy development regarding the employment of people with disabilities.

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

Question: What is your general perception regarding the employment of People with disabilities in institutions in your province?		
Answers	**n**	**%**
Strongly Positive	5	8,3
Positive	12	20
Neither Positive nor Negative	32	53,4
Negative	11	18,3
Strongly Negative	-	-

Respondents generally assessed the impact of employees with disabilities on organizations in Bursa in a neutral way (Table 61). On factors such as team dynamics and collaboration, productivity levels, innovation and creativity, and workplace culture, the majority did not see a significant positive or negative impact of employees with disabilities. Only one group stated that they saw positive impacts on these factors, but overall the impact of employees with disabilities was perceived as neutral. This indicates that the impact of employees with disabilities on organizations is limited and not significant.

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

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**	
	n	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**
Team Dynamics and Collaboration	-	-	2	3,3	35	58,3	20	33,3	3	5,0
Productivity Levels	1	1,7	8	13,3	42	70,0	8	13,3	1	1,7
Innovation and Creativity	-	-	7	11,7	38	63,3	12	20,0	3	5,0
Workplace Culture	-	-	6	10,0	44	73,3	10	16,7	-	-

3.5 Women Labor Force

In order to understand respondents' observations and views on the female workforce in Bursa, 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.

According to the respondents, creativity and innovation, communication and interpersonal skills, adaptability and problem solving skills stand out as strengths in the female workforce (Table 62).

Table 62. Female Labor Force Skills in Bursa

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	6,7	10	16,7	28	46,7	13	21,7	5	8,3
Communication and interpersonal skills	4	6,7	-	-	27	45,0	24	40,0	5	8,3
Organization and time management	4	6,7	-	-	38	63,3	14	23,3	4	6,7
Creativity and innovation	4	6,7	-	-	26	43,3	18	30,0	12	20,0
Technical skills (e.g. coding, data analysis)	4	6,7	9	15,0	27	45,0	18	30,0	2	3,3
Problem solving and critical thinking	-	-	4	6,7	35	58,3	9	15,0	12	20,0
Adaptability and multitasking	-	-	7	11,7	28	46,7	8	13,3	17	28,3

Respondents cited male-dominated sectors and cultural and societal expectations as the most important factors limiting women's representation in specific occupations in Bursa (Table 63). It is also noted that barriers such as limited access to education and training and gender discrimination in hiring and promotions also limit women's participation in the workforce. The lack of work-life balance policies was also cited by respondents as a factor that negatively affects women's representation in the workforce.

Table 63 Factors Limiting the Female Labor Force in Bursa

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	-	-	5	8,3	18	30,0	26	43,3	11	18,3
Limited Access to Education and Training in Certain Area	1	1,7	4	6,7	27	45,0	22	36,7	6	10,0
Gender Discrimination in Recruitment and Promotion	-	-	9	15,0	26	43,3	13	21,7	12	20,0
Lack of Work-Life Balance Policies	1	1,7	-	-	24	40,0	22	36,7	13	21,7
Male-Dominated Sectors	-	-	3	5,0	5	8,3	34	56,7	18	30,0

Respondents indicated that the most critical actions to better support the female workforce and harness their talents across a range of occupations are gender-neutral hiring practices and support for flexible working hours and childcare. Increasing access to technical and vocational training programs and promoting women to leadership roles were also considered important but slightly less critical (Table 64).

> **In the female workforce, creativity and innovation, communication and interpersonal skills, as well as adaptability and problem-solving abilities stand out as key strengths.**

Table 64. Factors Limiting the Female Labor Force in Bursa

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	-	-	2	3,3	4	6,7	37	61,6	17	28,3
Offer flexible working hours and childcare support	2	3,3	-	-	9	15,0	27	45,0	22	36,7
Increase access to technical and vocational training programs	-	-	4	6,7	25	41,7	26	43,3	5	8,3
Promoting women into leadership roles	-	-	10	16,7	14	23,4	23	38,3	13	21,7

3.6 Technological Change and its Effects on Labor Force

In order to understand the observations and views of the respondents in Bursa on technological change and its impact on the labor force, we 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 faced by the labor market in adapting 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 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 made accordingly. However, since the rate of missing data is low in some tables, missing data analysis was not performed in these tables.

Respondents generally assess the impact of new technologies on the labor market in Bursa positively. The majority think that these technologies will have a positive or at least a neutral impact on the labor market. However, a small number of respondents indicated that these changes may have negative consequences (Table 65).

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

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	8	13,3
Slightly Positive	20	33,3
Neither Positive nor Negative	25	41,7
Slightly Negative	6	10,0
Strongly Negative	1	1,7

Respondents believe that artificial intelligence and machine learning specialists, e-commerce and supply chain specialists, software developers and engineers, cybersecurity specialists and robotics engineers will be most in demand in the next 10 years. Relatively less demand is projected for fields such as traditional craftsmanship (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	37
[2] Animation	5
[3] R&D	11
[4] Artificial Intelligence and Machine Learning Experts	41
[5] Data Scientists and Data Analysts	11
[6] Cyber Security	21
[7] Renewable Energy Technicians (e.g. solar panel installers, wind turbine technicians)	13
[8] Software Developers and Engineers	29
[9] Healthcare Workers (e.g. nurses, doctors, medical technicians)	4
[10] Digital Marketing Experts	16
[11] Crafts (e.g. electricians, plumbers, welders)	1
[12] Educators and Trainers in Technology and Digital Skills	7
[13] Information Security Specialist	14
[14] Computer Games Programmer	1
[15] Cloud Computing Specialist	3
[16] Environmental Scientists and Sustainability Consultants	9
[17] Financial Analysts and FinTech Experts	2
[18] Robotics Engineers and Automation Specialists	14
[19] Social Workers and Counselors	4
[20] Digital Forensics Expert	8
[21] Social Media Specialist	7
[22] Micro Process Designer	8
[23] Enterprise Resource Planning Specialist	4
Notes = Respondents marked more than 1 occupation and specialization	

Respondents believe that technological developments will drive the highest demand for e-commerce and supply chain specialists, artificial intelligence and machine learning specialists, cyber security specialists, data scientists and analysts, robotics engineers and automation specialists. In addition, areas such as digital marketing, information security, cloud computing and digital forensics are also projected to be in significant demand. Renewable energy technicians, technology educators and micro-process designers are also among the occupations expected to be in demand in the future (Table 67).

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	2	3,3	15	25,0	43	71,7
[2] Animation Programmer	4	6,7	40	66,7	16	26,7
[3] R&D Staff	0	0	36	60,0	24	40,0
[4] Artificial Intelligence and Machine Learning Experts	0	0	20	33,4	40	66,7
[5] Data Scientists and Data Analysts	0	0	29	48,3	31	51,7
[6] Cyber Security Experts	0	0	23	38,3	37	61,7
[7] Renewable Energy Technicians (e.g. solar panel installers, wind turbine technicians	1	1,7	39	65,0	20	33,3
[8] Software Developers and Engineers	4	6,7	26	43,4	30	50,0
[9] Healthcare workers (e.g. nurses, doctors, medical technicians	7	11,7	39	65,0	14	23,3
[10] Digital Marketing	0	0	34	56,6	26	43,3
[11] Crafts (e.g. electricians, plumbers, welders	9	15,0	37	61,6	14	23,3
[12] Educators and Trainers in Technology and Digital Skills	1	1,7	38	63,3	21	35,0
[13] Information Security Specialist	0	0	37	61,7	23	38,3
[14] Computer Games Programmer	5	8,3	45	75,0	10	16,7
[15] Cloud Computing Specialist	0	0	44	73,4	16	26,7
[16] Environmental Scientists and Sustainability Consultants	4	6,7	36	60,0	20	33,3
[17] Financial Analysts and FinTech Experts	4	6,7	40	66,7	16	26,7
[18] Robotics Engineers and Automation Specialists	0	0	29	48,3	31	51,7
[19] Social Workers and Counselors	6	10,0	41	68,3	13	21,7
[20] Digital Forensics Expert	0	0	40	66,6	20	33,3
[21] Social Media Specialist	1	1,7	37	61,7	22	36,7
[22] Micro Process	1	1,7	35	58,3	24	40,0
[23] Enterprise Resource Planning Specialist	6	10,0	40	66,7	14	23,3

According to respondents, the biggest challenge in adapting the labor market to new technological and industrial developments is resistance to change in institutions (Table 68). This is followed by challenges such as the high costs of adopting new technologies and lack of infrastructure.

Table 68. Difficulties 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	**Marked by (Respondents)**
Lack of Skilled Labor Force	24
Limited Access to Education and Training	21
Resistance to Change in Organizations	31
High Costs of Adopting New Technologies	29
Lack of Infrastructure	29
Notes = Participants selected more than 1 option	

According to respondents, technical expertise in emerging technologies, problem solving and digital literacy stand out among the most critical skills in the future labor market (Table 69).

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	**Marked by (Respondents)**
Digital Literacy	31
Problem Solving	31
Critical Thinking	14
Communication Skills	20
Technical Expertise in Emerging Technologies	32
Notes = Participants selected more than 1 option.	

According to the findings, the majority of respondents (61.7%) think that the private sector in Bursa 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.

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Table 70. Investments of the Private Sector in Bursa 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	23	38,3
No	37	61,7

Respondents think that middle managers (46.7%) and entrepreneurs (40.0%) will benefit the most from technological developments in the labor market (Table 71). High-skilled workers (13.3%) are also likely to benefit to some extent, while low-skilled workers are not expected to benefit from these developments

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	13,3
Low-Skilled Workers	-	-
Mid-Level Managers	28	46,7
Entrepreneurs	24	40,0

Respondents consider low-skilled workers (43.3%) to be the group most at risk of job loss due to technological developments (Table 72). In addition, mid-career professionals (28.3%) and older workers (28.3%) are other groups perceived to be at significant risk.

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	26	43,3
Mid-Career Professionals	17	28,3
Older Workers	17	28,3

The most emphasized priorities for addressing the impact of technology on the labor market were the expansion of education and skills training programs and the establishment of state-led employment support programs (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	**Marked by (Respondents)**
Expansion of training and upskilling programs	45
Providing incentives for sectors to adopt technology responsibly	29
Strengthening cooperation between businesses and educational institutions	32
State-led employment support programs	37
Promoting lifelong learning initiatives	32
Notes = Participants selected more than 1 option.	

The majority of respondents (71.7%) think that their province is somewhat prepared for changes in the labor market caused by new technologies (Table 74). However, 28.3% stated that the province was not prepared at all. There are no respondents who think that they are very prepared. These results suggest that more effort is needed to adapt to technological transformation.

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**	**%**
Well Prepared	-	-
A Little Prepared	43	71,7
Not Prepared at All	17	28,3

3.7 Sectoral and Regional Labor Dynamics

In order to understand the observations and views of respondents in Bursa on sectoral and regional labor force dynamics, we 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 demand for labor?", and "Which sectors in your province are most likely to be affected by technological developments?"**. In the sectoral and regional labor force dynamics section, it was observed that there were some gaps in the data and therefore, missing data analysis was performed and the main analysis was made accordingly. However, since the missing data rate was low in some tables, missing data analysis was not performed in these tables.

Respondents consider migration trends, government incentives, labor skills and education levels to have the greatest impact on the development of sectors in the province (Table 75). Changes in local and international consumer demand and investments in regional infrastructure and development are also seen as important. The impact of the region's cultural heritage and natural resources is rated relatively low.

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

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	
	n	%	n	%	n	%	n	%	n	%
Cultural heritage or traditions specific to the region	-	-	13	21,7	29	48,3	14	23,3	4	6,7
Availability or scarcity of natural resources*	1	1,7	10	16,7	34	56,6	12	20,0	3	5,0
Government incentives	-	-	4	6,7	12	20,0	32	53,3	12	20,0
Changes in local or international consumer demand	-	-	1	1,7	28	46,6	20	33,3	11	18,3
Investing in regional infrastructure and development	-	-	7	11,7	17	28,3	25	41,7	11	18,3
Labor skills and education levels	-	-	-	-	26	43,4	25	41,7	9	15,0
Migration trends (e.g. rural-urban or international migration)	-	-	2	3,3	5	8,3	36	60,0	17	28,3

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	6	10,0
No, economic factors are more influential	42	70,0
Both are equally effective	8	13,3
I'm not sure	4	6,7

In line with the views of the participants, the most critical skills and talent gaps in Bursa are observed in the manufacturing, agriculture, forestry and fisheries sectors (Table 77).

Table 77. Bursa Sectoral Talent and skill 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	**Marked by (respondents)**
[1] Agriculture, Forestry and Fisheries	21
[2] Mining and Quarrying	1
[3] Manufacturing	32
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	7
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	6
[6] Construction	5
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	17
[8] Transportation and Warehousing	7
[9] Accommodation and Food Service Activities	0
[10] Information and communication	8
[11] Finance and Insurance Activities	5
[12] Professional, Scientific and Technical Activities	10
[13] Administrative and Support Service Activities	1
[14] Education	17
[15] Culture, Arts, Entertainment, Leisure and Sports	2
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	7
Notes = Respondents marked more than 1 for the sectors with the most critical talent and skills gaps in Bursa	

According to respondents, manufacturing and agriculture, forestry and fishing sectors stand out as the sectors that will see the highest labor demand in Bursa (Table 78).

Table 78. Sectors with the High Labor Demand in Bursa

Question: Which sectors in your province do you think will have high labor demand?	
Sectors	**Marked by (Respondents)**
[1] Agriculture, Forestry and Fisheries	27
[2] Mining and Quarrying	4
[3] Manufacturing	38
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	13
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	15
[6] Construction	15
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	25
[8] Transportation and Warehousing	14
[9] Accommodation and Food Service Activities	28
[10] Information and Communication	11
[11] Finance and Insurance Activities	5
[12] Professional, Scientific and Technical Activities	16
[13] Administrative and Support Service Activities	4
[14] Education	15
[15] Culture, Arts, Entertainment, Leisure and Sports	13
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	20
Notes =Participants marked more than 1 sector	

According to respondents, the manufacturing sector is the sector most likely to be affected by technological developments in Bursa (Table 79). Information and communication and professional, scientific and technical activities are other sectors that are likely to be affected by technological developments.

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

Question: Which sectors in your province are most likely to be affected by technological developments?	
Sectors	**Marked by (Respondents)**
[1] Agriculture, Forestry and Fisheries	19
[2] Mining and Quarrying	6
[3] Manufacturing	43
[4] Electricity, Gas, Steam and Air Conditioning Production and Distribution	9
[5] Water Supply; Sewerage, Waste Management and Improvement Activities	14
[6] Construction	14
[7] Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	17
[8] Transportation and Warehousing	19
[9] Accommodation and Food Service Activities	12
[10] Information and Communication	24
[11] Finance and Insurance Activities	9
[12] Professional, Scientific and Technical Activities	22
[13] Administrative and Support Service Activities	2
[14] Education	18
[15] Culture, Arts, Entertainment, Leisure and Sports	13
[16] Other Service Activities (e.g: Repair of computers, communication equipment, household goods, clothing, hairdressers, barbershops)	12
Notes = Respondents marked more than 1 sector	

3.8 Links between Education and Employment

In order to understand the observations and views of the respondents in Bursa on the **"links between education and employment"**, they were asked to respond to the questions **"To what extent are the existing 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 effectiveness of existing education and training programs in Bursa in preparing employees for technological and industrial developments remains at very low levels (Table 80). While 55% of the participants stated that the current education and training programs are not effective in preparing employees for technological and industrial developments, 10% stated that they are not effective at all. Only 25% (5% very effective, 20% effective) think that these programs are effective in preparing employees. These results show that the education system is inadequate in the face of technological and industrial developments and that there is a serious need for improvement in this area.

Table 80. The Effect of Existing Education and Training Programs in Bursa 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	3	5.0
Effective	12	20.0
Moderately Effective	6	10.0
Not Effective	33	55.0
Not Effetvive at All	6	10.0

Respondents emphasize that universities and career centers play an important role in adapting to technological developments (Table 81). In particular, training programs on emerging technologies, applied curriculum integration and labor market analyses are seen to be of high importance.

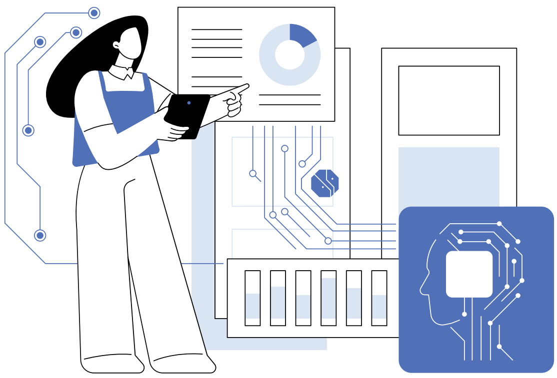

Table 81. The Role of Universities and Career Centers in People's Adaptation to New Technologies

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)	-	-	-	-	27	45,0	26	43,3	7	11,7
Integrate hands-on, industry-oriented curricula to align with labor market demands.	-	-	-	-	20	33,3	34	56,7	6	10,0
Facilitate partnerships with industries for internships, apprenticeships and research opportunities	-	-	-	-	12	20,0	32	53,3	16	26,7
Provide career counseling to help students and job seekers understand evolving labor market trends	-	-	-	-	10	16,7	28	46,7	22	36,7
Promote lifelong learning and professional development through certificates and online courses	4	6,7	-	-	18	30,0	29	48,3	9	15,0
Creating specialized centers focused on innovation and entrepreneurship	-	-	6	10,0	28	46,7	15	25,0	11	18,3
Improving digital literacy and soft skills training (e.g. teamwork, problem solving	-	-	-	-	10	16,7	29	48,3	21	35,0
Conducting regular labor market analyses to identify skills and sectors in high demand	-	-	-	-	8	13,3	39	65,0	13	21,7

3.9 Recruitment Processes and Challenges

In order to understand the observations and opinions of the participants in Bursa on **"recruitment processes and challenges"**, we asked them to answer questions such as **"How often do you have difficulty in 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, so a missing data analysis was performed and the main analysis was conducted accordingly. However, since the rate of missing data was low in some tables, missing data analysis was not performed in these tables.

53.3% of the participants responded **"We usually have difficulties"** and 35% **"Sometimes we have difficulties"**, indicating that they had difficulties in finding candidates with the necessary technical skills (Table 82). Only 8.3% said **"We always have difficulties"** and 3.3% said **"We rarely have difficulties"**. This indicates that the technical skills gap is widespread and that there is a serious difficulty in finding qualified candidates in the labor market.

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	-	-
We are rarely challenged	2	3,3
Sometimes we struggle	21	35,0
We often struggle	32	53,3
We always struggle	5	8,3

A large majority of respondents (58.7%) think that organizations in Bursa face a lack of qualified candidates the most during recruitment (Table 83). This indicates that finding candidates with sufficient skills and experience in the labor market is a challenge.

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	9	15,0
[2] High competition for skilled workers	16	26,7
[3] Lack of qualified candidates	35	58,3

According to respondents' views, digital or ICT-related skills, communication skills and skills such as problem solving and critical thinking are the most common skill gaps among job applicants in Bursa (Table 84).

Table 84. Skill Gap Among Job Applicants

Question: In which areas do you think there are the most common skills gaps among job applicants in your province?	
Options	**Marked by (Respondents)**
Technical skills and critical thinking	22
Communication skills	27
Leadership or management skills	11
Problem solving and critical thinking	25
Customer service skills	13
Digital or IT-related skills	28
Notes = Participants selected more than 1 option.	

The majority of respondents think that the economic conditions of the province have a significant impact on the recruitment process (Table 85). In the majority of cases, economic conditions had a major impact on the recruitment process, while only a very small proportion indicated that they had little or no impact. This suggests that economic conditions are a determining factor in the labor market.

Table 85. The Impact 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	11	18,3
It has a Major Impact	32	53,3
Moderate Impact	15	25
Little Effect	1	1,7
No Effect at All	1	1,7

Most respondents emphasized the importance of diversity and inclusion in improving organizational performance (Table 86). This finding shows that there is a strong consensus that diversity and inclusion play an important role in enhancing organizational success.

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	-	-
Less Important	-	-
Moderately Important	14	23,3
Important	27	45
Very Important	19	31,7

In the light of the data obtained within the scope of the survey, labor supply and demand imbalances in Bursa, sector-based labor shortages and employment expectations are detailed. For a more in-depth interpretation of the survey data, the next section will focus on the analysis of the stakeholder interviews conducted within the scope of the field study.

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3.10 Highlights of the Survey Analysis

1. Labor Market Analysis

While the demand for skilled labor is increasing in certain sectors in Bursa, economic challenges are reducing job opportunities. The decline in employment is driven by factors such as a decline in market demand, an aging workforce, reduced vocational training opportunities and job shifts to other regions.

2. Labor Demand and Qualified Personnel Shortage

There is a shortage of skilled labor in manufacturing, agriculture, forestry and technical activities. The main reasons for this shortage are low wages or poor working conditions, an aging workforce, inadequate training programs and migration.

3. Employment of Migrant Workers and People with Disabilities

The perception of migrant labor is generally neutral. While low labor costs and filling skills gaps make migrant labor attractive, language barriers and cultural adaptation stand out as significant challenges. The perception towards the employment of people with disabilities is also mostly neutral.

4. Female Labor Force

The biggest obstacles to women's employment are male-dominated sectors, cultural expectations and lack of work-life balance policies. Flexible working hours, childcare support and equal employment policies are important to increase women's participation in the labor force.

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5. Technological Change and Effects on Labor Force

In the coming years, professions such as artificial intelligence, e-commerce, data analytics and robotics engineering will come to the fore. However, low-skilled workers are seen as the group most at risk of job loss due to technological transformation.

6. Sectoral and Regional Labor Dynamics

The biggest skills gap in Bursa is observed in manufacturing, agriculture and forestry sectors. The sectors with the highest labor demand are manufacturing and agriculture, and the sectors that will be most affected by technological developments are manufacturing, information and communication, and technical sciences.

7. Linkages between Training and Employment

Existing education and training programs are thought to be insufficient to prepare employees for technological developments.

8. Recruitment Processes and Challenges

Employers have great difficulty finding candidates with technical skills. The most common skills gaps are digital literacy, communication and critical thinking. Diversity and inclusion in organizations are considered important for corporate performance

CHAPTER IV

CHAPTER IV

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

This section first provides general information on the procedures followed during the qualitative data collection phase of the fieldwork conducted on January 27-29, 2025, the stakeholders interviewed and the research team for the Bursa Socio-Economic Sector Current Situation Report.

4.1 Methodology of Qualitative Interviews

During the three-day fieldwork in Bursa on January 27-29, 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 11 focal people from the interviewed institutions participated in semi-structured interviews. Interviews were conducted with a total of 66 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.

This section analyzes the data obtained from semi-structured interviews with 66 key informants from 10 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, different sub-components related to each theme are explained according to the opinions and suggestions stated in the qualitative analysis.

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

Bursa has significant employment potential driven by its strong production capacity across the industry, agriculture, and services sectors. The automotive sector stands out with its robust production and export capabilities, while the growth of the sub-industry and technological transformation further boost labor demand in this field. In the textile sector, the shift toward high-tech production is increasing the need for skilled workers, whereas in agriculture, the transition from traditional methods to organic and technology-assisted farming is diversifying employment opportunities. The logistics, health and IT sectors continue to grow, while the high export capacity of industrial production supports the potential for job creation. In order to make effective use of these opportunities, strengthening vocational training and shaping workforce planning according to sectoral needs will maximize Bursa's workforce capacity.

In this section, the sectoral structure of Bursa is discussed and its impacts on the labor market and potential capacity and opportunities in terms of employment are reviewed. Bursa has a strong industrial, agricultural and service sectoral structure and each of these sectors has different impacts on the labor market. Industry in the city has deep roots in the automotive, textile, food processing and machinery manufacturing sectors and these sectors contribute significantly to Bursa's economic growth. The automotive sector in particular has a strong presence with production facilities of globally recognized companies, while the textile sector also has a significant presence in the city. However, both sectors are increasing the demand for labor and diversifying the qualification requirements of the workforce with technological developments and modernization of production processes.

There are 449 motor vehicle, trailer and semi-trailer manufacturing enterprises in the province and these enterprises constitute 18.22% of the total enterprises in Türkiye (Table 6). This ratio shows that Bursa is one of the country's strongest production centers in the automotive industry. On the other hand, automotive production in Bursa is not only limited to assembly processes, but is also highly developed in terms of sub-industry and supply chain. Bursa's automotive sub-industry companies operate in areas such as engine parts, chassis, electronic equipment and plastic injection molding, and these components are exported not only to the domestic market but also to European and Middle Eastern countries. A large portion of Türkiye's total automotive production is realized in Bursa, and this sector has become the most important factor boosting the city's export capacity. As of 2021, the industrial sector accounts for 44.11% of Bursa's industrial GDP, with automotive production accounting for the largest share (Table 4).

This growth in the industrial sector increases the demand for more skilled labor in areas such as textiles and automotive, while at the same time leading to the withdrawal of small-scale firms from the market. Especially in the textile sector, large-scale firms are strengthening their dominance in the sector, and as production in this field becomes more high-tech, the demands for labor qualifications are also increasing. In this context, Bursa's textile sector is growing in line with its advanced industrial structure, and while this growth creates opportunities for the workforce in the sector, it also creates a shortage of qualified labor. On the other hand, some challenges in the textile sector have affected the employment gap in the sector due to reasons such as firms moving their factories abroad. This creates a contraction in the labor market, especially for blue-collar workers in the textile sector.

On the other hand, the agricultural sector continues to play an important role in Bursa's economy. In addition to traditional areas such as olive, fruit and vegetable production, there is potential for growth in organic farming and technologically assisted agriculture. This transformation in agricultural production is diversifying labor demands and the growth in the agro-based industry and food processing sectors is creating new opportunities in Bursa's labor market. However, the labor force used in agriculture is often seasonal and low-skilled, limiting the labor productivity of the agricultural sector and negatively affecting the sustainability of the labor force.

Bursa's service sector is growing, particularly in areas such as logistics, health, education and tourism. The city is geographically an important logistics hub, which supports the growth of the logistics and transportation sectors. Increasing digitalization and automation in the logistics sector increases the demand for a more qualified workforce, which in turn requires a more educated workforce. In addition, the growth in the health sector is creating a significant labor demand in the city, and the development of this sector brings the need for more qualified employees in the labor market.

Bursa's labor market is also being transformed by rapidly developing technology-based sectors. New fields such as artificial intelligence and information technologies increase the demand for qualified labor. However, labor supply in this area lags behind the existing industrial infrastructure. However, the available labor force is often in demand for low-paid and unskilled jobs, which increases the need for qualified personnel in certain occupations on a sectoral basis

In conclusion, imbalances and demands across sectors in Bursa's labor market make it difficult to effectively utilize the city's labor capacity. However, developments such as growth and digitalization in the industrial sector, transformation in the agricultural sector and expansion in the service sector allow for the diversification of labor demand and the creation of new opportunities. These opportunities can be seized by increasing the qualified labor force, strengthening vocational training and implementing education policies in line with sectoral needs. Strategic planning is crucial for the harmonious growth of sectors in the city and for increasing labor productivity.

4.3 Sectors with Labor Shortage

Although Bursa has a significant labor potential in the industrial, agricultural, service and logistics sectors, it faces a labor shortage in certain areas. The automotive and textile sectors are increasing the demand for qualified labor such as CNC operators, welders and technical personnel with the technological transformation and development of production processes. While the agriculture sector faces employment continuity problems due to the prevalence of seasonal and low-paid jobs, it needs more skilled labor in areas such as organic farming and greenhouse cultivation. The service and logistics sectors are struggling to find qualified workers to meet the growing demands in retail, health, accommodation and transportation. To address Bursa's labor shortage and meet sector-specific needs, it is crucial to strengthen vocational education, develop training programs aligned with industry requirements, and implement effective workforce planning.

In this section, the sectors and occupations with shortages in the labor market in Bursa are reviewed and the impact of these shortages on regional labor force dynamics is discussed. Bursa has one of the most dynamic labor markets in Türkiye with its strong production structure in industry, agriculture, services and logistics sectors. While the automotive, textile and food industries in particular stand out with their high employment capacity, the technology-oriented transformation of the industry and changes in production processes increase the shortage of qualified labor force. While the deficit in occupations requiring technical skills limits the sustainable growth of the sectors, the fact that the vocational education system is not fully compatible with the industry makes it difficult to meet the need for labor force.

> **Bursa's labor market is also undergoing a transformation driven by rapidly developing technology-based sectors. Emerging fields such as artificial intelligence and information technologies are increasing the demand for a skilled workforce.**

Tablo 87. Sectors and Positions with Labor Shortages in Bursa

Sector	Positions with Labor Shortage
Industry	CNC Operators
Industry	Welding Masters
Industry	Electricity Technicians
Industry	Carbon Footprint & Energy Efficiency Experts
Industry	Software Developers
Automotive	Qualified Technical Staff
Automotive	Motor Master
Automotive	Lighting Systems Technician
Textile	Textile Machinery Maintenance and Repair Specialists
Textile	Production Elements
Textile	Paint Shop Workers
Textile	Weaving Workers
Agriculture	Unskilled Labor
Agriculture	Organic Agriculture Experts
Agriculture	Greenhouse Specialists
Agriculture	Modern Agricultural Techniques Experts
Service	Waiters
Service	Kitchen Staff
Service	Retail Workers
Logistics	Warehouse Managers
Logistics	Logistics Coordinators
Logistics	Drivers
Health	Qualified Health Technicians

Bursa's large industrial areas such as automotive and textile create significant employment gaps in professions such as CNC operators, welders and electric hybrid vehicle maintenance technicians. The need for technical staff increases with the development of industry, leading to disruptions in production processes and productivity losses. Similarly, the agriculture, service and logistics sectors are also experiencing a significant shortage of skilled labor. In particular, labor shortages in the automotive supply industry, garment production and logistics management cause employers to struggle to find employees and fail to fully exploit the growth potential of the sectors.

Bursa's automotive sector has brought a huge labor demand to the city, and with the industry becoming more high-tech based, it requires more qualifications and expertise from the workforce. In the automotive supply industry and metalworking sectors, the shortage of CNC operators, welders, assemblers, engine masters, lighting systems technicians are reported to be at critical levels. Therefore, the growth of the sector requires increasing workforce capacity and strengthening technical trainings. Although training programs are available in these areas to meet the needs of the industry, the adaptation process of graduates to the field and long-term employment in the sector is still seen as a major problem. Thus, despite the growing demand for blue-collar labor, employers anticipate that this gap will widen further due to the declining interest of the new generation in the industrial sector and the time it takes to train qualified personnel.

The textile sector has a similarly large labor shortage. The lack of labor force is especially noticeable in the fields of flat stitch machining and garment production. In Bursa's textile industry, the management of production processes by larger firms has led to the withdrawal of small-scale enterprises from the sector. Although there have been fluctuations in the sector in recent years due to the increase in labor costs and the shift of production to low-cost regions, there is still a significant employment need in Bursa. On the other hand, shortages of qualified labor in areas such as dyeing workers, weaving workers, production staff and textile machinery maintenance and repair negatively affect productivity in the sector. One of the main reasons for this labor shortage is that the vocational education system in Bursa is not fully compatible with the requirements of the industry. 81.8% of employers in the industrial sector state that the applicants do not have the necessary vocational knowledge and skills. This situation creates difficulties in recruitment, especially in occupations such as machine operator, weaving machine operator and gas welding in the manufacturing sector (ISKUR, 2024). Strengthening vocational training in this field, establishing internship and practice-oriented training models integrated with the sector, and encouraging the active participation of the private sector in training processes will be an important step towards closing the gaps in the sector.

Serious labor shortages are also observed in the agricultural sector. Bursa has a large labor demand in agriculture-based production areas, but this demand is often met with low-skilled labor. Harsh working conditions and low wages reduce the interest of the local labor force in the agricultural sector. For example, cold storage workers and packers often quit due to harsh working conditions and employment in this area is not sustained. Instead, temporary workers and seasonal labor largely fill this gap. However, new developments, especially in organic agriculture and greenhouse cultivation, demand more skilled labor. At this point, there is a need to increase investments in trained labor force to address the labor shortage in the agricultural sector.

The service sector is another important area in Bursa's labor market. There is an increasing demand for labor in sectors such as retail, health, education, logistics and tourism. However, shortages of qualified labor and inadequate training are common problems in the service sector. Especially in the catering and hospitality sectors, labor demand for positions such as waiters and waitresses and kitchen staff is constantly increasing. However, most of the employees in the sector do not have the necessary vocational training, which leads to difficulties for businesses in finding qualified staff. On the other hand, the demand for labor for positions such as cashiers, aisle clerks, cooks and elderly care is also increasing, but shift systems and transportation issues make it difficult to attract labor to these areas.

Similarly, there is a huge labor shortage in the logistics sector, with positions such as warehouse managers, logistics coordinators and drivers in constant demand. The growth of the logistics sector in Bursa is leaving the city with more labor shortages.

In addition, there is a growing need for software engineers, data analysts and artificial intelligence specialists in Bursa. However, Bursa does not have a sufficient labor force in these fields.

One of the main reasons for these imbalances in Bursa's labor market is education-related problems. The low quality of education in vocational high schools and training programs that are incompatible with sectoral demands lead to difficulties in training qualified labor forces. This situation leads to widening shortages, especially in the industrial and service sectors. Shortages of technical staff in the industrial sector are not only related to inadequacies in education but also to the inability of salary levels in this field to meet labor demand. For example, in technical occupations such as CNC operators and welders, despite being offered high salaries, there is still not enough labor available. This makes it imperative for employers to invest more to close labor shortages.

In order to overcome these challenges in Bursa's labor market, vocational training needs to be strengthened, training programs need to be developed in line with sectoral demands, and workforce planning needs to be done correctly. In order to ensure the balance between labor supply and demand, it is of great importance that both the state and the private sector jointly produce solutions, training programs, projects to support women's employment, trainings for digital transformation and workforce orientation policies are shaped correctly. In this way, labor shortages and imbalances in Bursa's labor market can be eliminated and the city can achieve sustainable economic growth.

4.4 Labor Force Qualifications and Supply-Demand Matching

Despite the growth in the industrial, agricultural and service sectors, the labor market in Bursa is experiencing imbalances due to the lack of qualified labor and sectoral supply-demand mismatch. While the need for technically skilled workers is increasing in the textile, automotive and defense industries, the current education system is not fully aligned with the industry, deepening the shortage of intermediate staff. The logistics, health and agriculture sectors demand a better-equipped workforce with new dynamics such as digitalization and green transformation, but there are not enough human resources in these fields. There are productivity losses, especially in agriculture, which relies on seasonal and temporary labor, and in sectors that support low-skilled employment. In order for Bursa to fully utilize its labor potential, it is critical to strengthen vocational training, implement sector-specific training policies and increase industry-education cooperation.

This chapter discusses the structural dynamics of the labor market in Bursa, the quality of the labor force, the supply-demand matching and the role of vocational education in achieving this balance. The rapidly increasing population and urbanization in Bursa leads to a continuous growth in the labor force potential. However, this growth causes labor force participation rates to remain disproportionate to sectoral developments due to insufficient labor force employment in all sectors. This situation makes it difficult to direct the labor force in accordance with the sectors and leads to imbalances in the labor market.

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

The demand for intermediate staff in Bursa's labor market has increased significantly. The textile sector in particular is one of the main sectors that generate intense labor demand in industrial zones. Textile enterprises demand blue-collar labor, especially in areas such as dyeing and weaving enterprises. These demands are generally for skilled and unskilled workers, and the Organized Industrial Zones (OIZs) in the city are the places where such demands are concentrated. However, the supply of labor does not overlap with the qualified personnel to meet the demands of these sectors.

The mismatch between labor supply and demand is particularly pronounced for skilled labor. Demand for white-collar labor is increasing in technology-based sectors such as the automotive industry and defense industry. However, the labor demands in these sectors do not fully match the labor potential in Bursa. While these sectors are experiencing shortages in certain professions such as qualified technical personnel and software specialists, the existing workforce is generally not equipped to meet the demands in this field. One of the main reasons for these labor shortages in the industrial sector is inadequacies in vocational education. The low quality of education in vocational high schools leads to difficulties in meeting labor demand. In order to close the labor shortage in this area, stronger cooperation between vocational high schools and industry is needed. Moreover, in order for the industry to fully utilize its growth potential, it is important to align the education system with sectoral demands.

In the labor market in Bursa, significant labor demands are emerging in new areas such as green transformation and energy efficiency, especially in the industrial and service sectors. These sectors are being shaped by regulations such as the European Union's green deal and companies need new energy sources and energy efficiency experts to reduce their carbon footprint. Trainings and certifications have gained importance to address this demand. Training programs offer a great opportunity to prepare both industry and the workforce for these new demands.

In the agricultural sector, while the demand for low-skilled labor is high, new areas such as modern farming methods and organic farming require more educated labor. However, labor used in agriculture is mostly seasonal and temporary. This limits productivity in the sector and exacerbates the shortage of skilled labor. On the other hand, the agricultural sector creates significant labor needs, especially in areas such as fruit and vegetable production, animal husbandry and greenhouse cultivation. However, this need is largely met by seasonal and temporary workers. The use of seasonal labor has negative impacts on productivity. Moreover, the widespread adoption of modern and technological production processes instead of traditional methods in agriculture has increased the demand for a more educated labor force.

Increasing labor demand in the service sector, especially in logistics, health and education, requires more educated workers to join the sector. The logistics sector continues to grow, benefiting from Bursa's geographical advantages and industrial infrastructure. However, the digitalization and automation processes of this sector demand a more qualified workforce. The growth in the logistics sector brings with it labor shortages, especially in positions such as warehouse managers, logistics coordinators and drivers. Digitalization and increased automation in the sector have increased the demand for a more educated and technically skilled workforce. However, there are major challenges in meeting these demands. The lack of an adequately trained workforce is a key factor limiting growth in this sector.

In Bursa's health sector, there is an increasing demand for labor with the development of health tourism. The growth in the health sector increases the need for a more educated and qualified workforce. There are serious labor shortages, especially in health workers and specialized fields. Improving the quality of education in this field and organizing sector-specific training programs can help address the labor shortages in the health sector. The growth in the health sector brings with it the need for more educated personnel in the labor market.

As a result, the mismatch between labor supply and demand in Bursa is becoming more pronounced due to the high demand for skilled labor and the lack of training for the sector. Developments in the industrial and service sectors have led to a diversification of labor demand, while the mismatch of the existing labor supply with sectoral demands deepens this imbalance. In order to redress this imbalance, vocational training needs to be strengthened, sector-specific training policies need to be developed and labor productivity needs to be increased. Taking into account technological transformation and new sector demands, cooperation with vocational high schools and universities should be increased and the workforce should be trained in line with these new needs. Sector-specific trainings in new areas such as green transformation will be effective in addressing this imbalance.

4.5 Women's Labor Market Participation: Opportunities and Constraints

Although women's labor force participation in Bursa offers significant opportunities in the industrial, agricultural and service sectors, it has not reached the desired level due to social and structural barriers. While women's labor force remains limited in large employment sectors such as automotive and textiles, women's employment is increasing in sectors such as health, logistics and education. Although women's entrepreneurship is increasingly supported through digital and cooperative-based initiatives, persistent inequalities in the labor market and the lack of adequate childcare facilities continue to hinder the sustainability of female employment. Empirical studies highlight that flexible working models, equal pay policies, and technical skill acquisition programs are critical measures for strengthening women's representation in the labor force.Steps to be taken in cooperation with the government and the private sector will contribute to economic growth by ensuring more effective participation of women in employment in Bursa.

Women's participation in the labor market has gained great importance for economic development, especially in recent years. In Bursa, these dynamics are shaped by the opportunities and constraints affecting women's labor force participation. Women's place in the labor market is often determined in relation to social norms, sectoral demands and education. This section will focus on the opportunities and constraints for increasing women's labor market participation in Bursa.

While Bursa has a strong infrastructure in industry, agriculture and services, women's participation in these sectors is still limited. Although the industrial sector, especially in areas such as automotive and textiles, has a large demand for labor, women's labor force participation rate in these sectors is generally low. Women are less involved in heavy labor-intensive areas of industry and are generally concentrated in more traditional jobs such as the textile sector. Although the high concentration of women in the textile sector enables them to find jobs in positions that are in line with sectoral demands, working conditions in this field are often difficult. In addition, since many women are not in leadership positions in the industry, the female workforce in this sector is generally concentrated in blue-collar jobs. A similar situation is observed in the agricultural sector. Women are involved in agricultural production processes, particularly in harvesting fruits and vegetables, but these jobs are often seasonal and require low-skilled labor. This constitutes an obstacle for women to attain more permanent and qualified positions in agriculture. More permanent and skilled positions for women in agriculture can be achieved through the widespread use of modern production techniques. In addition, more training opportunities are needed for women to acquire technical knowledge and skills in agriculture. Such trainings can increase women's participation in agriculture and increase productivity in the sector.

In Bursa, women's labor force participation rates have increased especially in sectors such as logistics, health and education. While the logistics sector demands a more educated workforce through digitalization and automation processes, women are adapting faster to the changing demands in this field. The growth in the health sector offers significant opportunities for the female workforce. However, there is a need for more female employment to close the labor shortages in these sectors. In addition, increasing women's participation in specialized areas of health services would be a critical step in meeting the labor needs in the sector.

There are also some projects implemented in Bursa to increase women's participation in the labor force. For example, various training programs and support are offered to help women become more involved in entrepreneurship. Women are encouraged to start their own businesses through trainings in areas such as e-commerce and digital entrepreneurship. In addition, women are encouraged to contribute to their home economies through production in areas such as cooperatives and handicrafts. Such entrepreneurship projects not only increase women's participation in the labor force, but also enable them to gain economic independence. On the other hand, in the past in Bursa, various supports such as sewing machines, thread, needle sets, etc. were provided to women to encourage in-household production in order to increase women's participation in the labor force; however, no continuity has been achieved in this context. Although the support provided for contract manufacturing has created an opportunity to increase the labor force, more permanent and structured programs are needed for women to take part in the labor market in a sustainable manner.

There are also some constraints that hinder women's labor force participation in Bursa. These include inequalities that women face in the labor market, low wages and lack of senior positions in the labor market. Moreover, women's childcare responsibilities and family obligations are among the factors limiting their participation in the labor force. For these reasons, policies such as flexible working hours, daycare facilities and equal pay for equal work need to be put in place to enable women to participate more in the labor force.

As a result, labor market participation in Bursa can be increased by providing working conditions that support women's employment in sectors and offering more training opportunities. It is critical for women to have a stronger presence in the labor market and to provide more entrepreneurship opportunities. Steps to be taken by both the state and the private sector in this process will enable women in Bursa to participate more effectively in the labor force.

4.6 Employers' Attitudes towards Migrant Workforce and Market Dynamics

While migrant labor in Bursa plays an important role, especially in the textile, industrial, construction and agricultural sectors, informality and lack of job security make long-term employment difficult. Employers prefer migrant workers for their low cost and quick adaptation advantages, but are hesitant about quality control, work discipline and continuity. Although the experience of migrant workers, especially women migrant workers, in contract manufacturing offers employment opportunities, this potential cannot be fully utilized due to the contraction of the sector and quality expectations. Migrant workers' frequent job changes and lack of social security are among the main factors that make their integration into the labor market difficult. To ensure sustainable employment, vocational training programs need to be expanded and sectoral integration mechanisms need to be strengthened. In addition, increasing incentives to prevent unregistered work and raising employers' awareness of migrant labor can help create a more inclusive and stable labor market.

This section assesses the role of migrant labor in different sectors of the labor market in Bursa and how employers' attitudes towards this labor force are shaped. In the labor market in Bursa, the SuTPs are seen as an important source of labor, especially in the textile, industry, construction and agriculture sectors. However, employers' attitudes towards this labor force are shaped by economic requirements, working conditions and quality expectations. While the employment of SuTPs workers is considered an advantage in some sectors due to low wage costs and the potential for rapid adaptation to the workforce, it also raises concerns about quality control, work discipline and sustainable employment.

The textile sector is one of the areas where SuTPs work intensively. In particular, women SuTPs who have experience in textile production in Aleppo can quickly adapt to textile workshops in Bursa. While the practice of contract manufacturing at home in Aleppo facilitated their adaptation to production processes, the contraction of contract manufacturing in Bursa over time has limited the employment opportunities of women migrant workers. In addition, employer complaints that home-based production does not meet quality standards have made women SuTPs less preferred for this type of work.

One of the most important labor market challenges faced by migrant workers in Bursa is informal employment. The majority of migrant workers are uninsured and precariously employed, making their long-term integration into the labor market more difficult. Informal work is particularly prevalent for women and poses risks to job security and job continuity due to their lack of social security. In addition, another factor affecting the labor force participation of women SuTPs are the problem of childcare and inflexible working hours.

On the other hand, for employers, migrant labor is considered a low-cost and flexible option. SuTPs are generally employed in heavy and low-paid jobs that Turkish citizens do not prefer, especially in sectors such as construction and agriculture. However, while their acceptance of low wages may appear to be an advantage for employers, quality and labor continuity issues should not be overlooked.

Employers in Bursa are cautious about whether SuTPs are a sustainable solution for long-term employment. The main reasons for this include the frequent job changes of migrant workers and the difficulties they face in adapting to living conditions in Türkiye. In addition, employers state that in some sectors, especially in collective work, workers with social security may experience problems of group cohesion and this may negatively affect production processes.

In conclusion, while SuTPs have an important position in the labor market in Bursa, they face various challenges in terms of sustainable employment. In order to better integrate the migrant workforce economically and socially, vocational training programs and sectoral integration mechanisms need to be strengthened in line with the quality expectations of employers. Such initiatives will both improve the employment conditions of migrant workers and ensure a more balanced and sustainable labor market in Bursa.

4.7 Barriers to Migrants' Transition to the Formal Labor Market

In Bursa, the participation of foreigners under temporary protection in the formal labor market remains limited due to bureaucratic obstacles in the process of work permits, employers' tendency towards unregistered employment and language barriers. Especially in the textile, construction and agriculture sectors, employers prefer to employ migrant workers informally to avoid insurance and social security costs. Migrant workers' preference to work in short-term jobs rather than long-term employment is another factor that makes the transition to formal employment difficult. Lack of language and cultural adaptation limits the integration of migrant workers in the labor market by directing them to only low-skilled jobs. Overcoming these barriers requires reforms to facilitate the obtaining of work permits, expanding vocational training programs and strengthening language support mechanisms. These steps will increase formal employment rates by ensuring the sustainable integration of migrant labor into the labor market.

This section assesses the main structural and bureaucratic barriers that make it difficult for the formal labor market participation of Syrians under Temporary Protection (SuTP) / International Protection Status Holders and Applicants (IPSHA) in Bursa. In Bursa, the transition of the SuTP/IPSHA labor force to the formal labor market faces various legal, economic and cultural barriers. The complexity and duration of work permit processes remain among the primary obstacles. Individuals under temporary protection or international protection have to complete certain procedures to obtain a work permit, which can be time-consuming and costly in many cases. Current legal regulations make it more difficult to obtain work permits in certain sectors, limiting the transition to formal employment for many migrant workers.

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

Another reason for workers with SuTPs/IPSHA to turn to informal employment is the tendency of employers to reduce costs. Small and medium-sized enterprises, especially in sectors such as textiles, construction and agriculture, tend to use informal employment to avoid insurance and social security premiums. Workers employed informally are deprived of social security and this leads to disorganization in the labor market.

In addition, the perception of some SuTPs/IPSHA that they will be in Türkiye temporarily is another factor limiting participation in the formal labor market. The fact that they prefer to work in more flexible and short-term jobs instead of long-term employment causes informal employment to become widespread.

Language barriers and cultural differences are also among the factors that complicate the integration of SuTPs/IPSHA into the labor market. Migrant workers, who have difficulty communicating effectively in the workplace, often turn to low-skilled jobs due to this situation, while employers prefer native labor for positions that require more adaptation.

In conclusion, the barriers to formal employment participation of the SuTPs/IPSHA workforce stem from a variety of factors ranging from legal regulations to employer strategies and language barriers. In order to overcome these problems, supportive policies such as streamlining work permit processes, expanding vocational training programs and language training should be developed. Such steps will increase the employability of the migrant workforce and ensure a more sustainable integration into the labor market.

4.8 Economic and Labor Market Effects of Potential Repatriation

The repatriation of SuTPs in Bursa is an important factor that could lead to serious changes in the labor market. Migrant labor has an important place in sectors such as textiles, agriculture, construction and industry, and possible returns could create serious employment gaps in these sectors. Especially in the textile and agriculture sectors, where the need for low-skilled labor is met by migrant workers, production processes are expected to be disrupted. However, in the long run, the reduction of the migrant labor force may accelerate the integration of the local labor force into the sector through further training and encourage the development of new employment policies for the industry. Successful management of this process requires increased investment in vocational training and effective workforce planning.

In this section, the return tendency of SuTPs living in Bursa and the possible effects of this process on the labor market are evaluated. In this context, there are various expectations. First, the fact that most migrants have lived and settled in Türkiye for many years limits their intention to return. Their children are studying and living here, which makes return economically and socially difficult. In addition, many migrants in Bursa have been working in the labor force for many years, especially in the industrial and textile sectors, which strengthens their economic ties. Therefore, a real flow of return is not expected. Expectations that returns will be limited have alleviated employers' concerns and allowed for a continuity in the need for labor.

On the other hand, it is foreseen that there may be significant impacts if migrants, especially workers with SuTPs, return to their countries. In Bursa, the migrant labor force is concentrated especially in the textile, construction, agriculture and industrial sectors and plays an important role in meeting the employment needs of these sectors. The loss of labor in these sectors may negatively affect production processes and sectoral growth.

Especially in the textile sector, it is known that there is a significant share of workers with SuTPs. This sector is characterized by low-paid and labor-intensive jobs, and the migrant workforce is particularly involved in low-skilled jobs. If the migrant labor force returns to their home countries, a large employment gap is expected to emerge in the textile sector and the domestic labor force will not be able to fill this gap.

There is a similar situation in the agricultural sector. Migrants constitute a large part of the agricultural workforce in Bursa and it is believed that this workforce, especially in fruit picking, vegetable processing and similar fields, will create a huge gap in these sectors if they return. It is believed that this disruption in agricultural production could lead to serious difficulties in growing and harvesting crops, which could negatively affect the local economy and food production.

In the industrial sector, the need for low-skilled labor is also met by migrants. The return of migrant workers could lead to disruptions in production lines and the loss of labor, especially in labor-intensive sectors, could lead to a slowdown in production. This could negatively affect the pace of exports to national markets.

On the other hand, there are views that the return of migrants will create opportunities in some sectors. Especially in some industries where there is a shortage of skilled labor, it is believed that the local workforce will fill this gap. However, it is clear that this transition will take time and that more investment is needed to train the native workforce. Therefore, although the return of migrant labor will create serious imbalances in the labor market in the short term, in the long term, this transition can be balanced by employing the native labor force in qualified jobs with more education.

In sum, the repatriation of migrants will have significant impacts on the labor market in Bursa. Especially in the textile, construction, agriculture and industrial sectors, large labor shortages may occur, which may negatively affect economic growth and the sustainability of these sectors. However, increased investment in training for the local labor force, coupled with the return of migrants, could balance the balance in the long run..

4.9 Inter-Institutional Communication Network in Transition to the Labor Market

The effective functioning of the labor market in Bursa requires strengthening inter-institutional coordination. The mismatch between labor supply and sectoral demands is exacerbated by the lack of cooperation between educational institutions, public and private sectors. In particular, vocational training programs are not fully aligned with sector needs, slowing down the labor transition process. While employers face difficulties in accessing qualified labor, jobseekers have difficulty integrating into employment due to the inadequacy of available training. To address this imbalance, data sharing among labor market actors should be increased, training programs should be updated according to sector dynamics and more coherent employment strategies should be developed.

This section assesses the role of inter-institutional cooperation and networking in facilitating the transition to the labor market in Bursa, where such collaboration plays a critical role in aligning labor supply with sector demands. This process is not only limited to matching labor supply with employer demands, but also requires matching the technical skills of employees with sectoral needs. The labor market oriented activities of various institutions in Bursa emphasize the importance of effectively orienting the labor supply. However, there are also challenges in this process. In particular, lack of interaction and coordination between institutions can negatively affect the effectiveness of projects supporting the transition to the labor market.

In Bursa, inter-institutional cooperation is one of the important factors accelerating the labor force transition process. However, the lack of cooperation and data sharing among stakeholders limits the success of strategic planning for the labor market. In particular, vocational training and certification programs are not aligned with sectoral demands. The fact that employers demand training in line with sectoral needs and that these demands are not adequately met by institutions creates a mismatch in the labor market.

In this context, labor market actors need to develop more flexible and adaptable cooperation mechanisms. It is important that these mechanisms include elements such as updating training programs, analyzing labor demands more quickly and organizing trainings in line with sectoral needs. In addition, local governments, public institutions, the private sector and civil society organizations need to work more closely together to support labor transition and employment.

In the labor market in Bursa, especially the rapid change in sectoral demands and the inability of educational institutions to provide training in line with these demands have a negative impact on the efficiency of the labor market. At this point, it is important to strengthen the coordination between institutions and accelerate the flow of information in order to make labor transition processes more efficient. In this process, aligning the skills needed by the labor market with the competencies of job seekers will increase labor productivity. In this respect, strengthening inter-agency cooperation in projects for labor transition will contribute to the creation of a more sustainable structure in the labor market.

> **Adapting Skills to Market Needs: Strengthening institutional coordination and aligning educational outcomes with sectoral demands is key to building a productive and sustainable labor market in Bursa.**

CHAPTER V

CHAPTER V

5. CONCLUSION AND RECOMMENDATIONS

This study aims to comprehensively analyze Bursa's labor market and identify sectoral employment gaps, vocational training needs, factors that make it difficult to access the labor force and policy development areas. 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 evaluated 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 Bursa, to identify which sectors have labor shortages and to develop concrete suggestions 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 of Bursa's labor market, expected qualifications and qualifications, employee gender preferences, attitude towards vulnerable groups and formal employment.

Bursa is one of the most important industrial and commercial centers of Türkiye with its historical and economic structure. Located at a strategic point in the Marmara Region, the city attracts attention with its industrial infrastructure, agricultural potential and trade volume. Due to the population growth rate and internal migration movements, Bursa's labor market is in constant change and transformation. This study provides a comprehensive assessment by analyzing Bursa's current economic structure, labor demand and shortages on a sectoral basis.

Bursa has a lower unemployment rate than Türkiye's average. In 2022, the unemployment rate in Türkiye was 10.4%, while in Bursa it was 8.9%. In 2023, the unemployment rate in Türkiye declined to 9.4%, while in Bursa it dropped to 8.3% (Table 15). The fact that Bursa's unemployment rate is lower than Türkiye's average can be attributed to the wide range of employment opportunities provided by the province's industrial and service sectors.

Bursa outperforms Türkiye in terms of employment rate. In 2022, the employment rate in Bursa was 50.6%, while it was 47.5% across Türkiye. In 2023, the employment rate in Bursa was 51.3%, while it was 48.3% in Türkiye (Table 16). Bursa's high employment rate is directly related to the intensity of industry and trade. In particular, the automotive, textile and service sectors are among the key elements that keep the province's labor force dynamic.

Bursa is also above Türkiye's average labor force participation rate. In 2022, the labor force participation rate in Türkiye was 53.1%, while in Bursa it was 55.5%. In 2023, while Türkiye's average was 53.3%, Bursa's rate was 56.0% (Table 17). This difference shows the vitality of economic activities and high labor force participation in Bursa.

Employment opportunities in the private sector in Bursa are much wider than in the public sector. As of 2023, the total number of vacancies in Bursa was 134,759, of which 134,650 were in the private sector and only 109 in the public sector. In Türkiye, the total number of vacancies is 2,677,006, the majority of which are in the private sector. The majority of job vacancies in Bursa are in the industrial and service sectors (Table 18). Bursa shows a similar trend to Türkiye in terms of job placement rates. In Bursa, a total of 66,382 people were placed in employment, of which 39,492 were male and 26,890 were female. In Türkiye, a total of 1,237,026 people were placed in employment (Table 19). The lower level of female employment compared to male employment stands out as a problem in Bursa as well as in Türkiye.

As mentioned above, Bursa is one of the largest industrial cities in Türkiye and has an important position in the automotive, machinery, metal and chemical sectors. The automotive sector has become the locomotive of Bursa's economy. However, the lack of qualified technical personnel in this sector stands out as a major problem. There is a serious shortage of personnel in areas such as CNC operators, welding masters, electrical technicians, CMM-supported quality control operators and carbon footprint and energy efficiency experts. There is also a need for skill-based employment in the machinery and metal industry, but vocational training is insufficient to meet these demands.

In addition, the growth potential of the chemical and plastics industry in Bursa is increasing. Chemicals production and recycling are gaining importance thanks to new investments. However, employees working in the chemical industry need to be trained more on occupational health and safety issues.

While Bursa's textile industry has traditionally been strong, the labor market has fluctuated in recent years due to changing competitive conditions and the relocation of firms abroad. There is a serious shortage of positions such as dyeing workers, weaving operators and textile machinery maintenance specialists. Vocational training programs need to be increased to adapt to new technologies.

Although Bursa has an important place in areas such as olive, fruit and vegetable production, there are deficiencies in the transition to modern agricultural techniques. Employment in the agricultural sector is generally seasonal and low-skilled labor. More education and infrastructure investments are needed to develop the agriculture-based industry.

Bursa is also an important city in terms of tourism potential. Uludağ Winter Tourism, thermal tourism and historical buildings contribute to the city's economy. However, there are serious shortages in the tourism sector in areas such as qualified guides, hotel staff and restaurant workers. In the service sector, logistics and e-commerce are growing areas and the need for employees with digital skills is increasing.

Bursa has also been a center of employment for migrant populations. Migrants are generally employed in the textile, agriculture and service sectors. However, in these sectors, there is competition for employment between locals and migrants. While locals expect job security and better working conditions, the rate of informal employment of migrants remains high.

Bursa has one of the most dynamic labor markets in Türkiye, with industry, agriculture, textile, service and tourism sectors creating a wide employment network. While the industrial sector continues to grow, the shortage of skilled labor and the need for technological transformation are among the most important issues that need to be addressed to increase competitiveness. The textile sector needs a restructuring process due to international competitive pressure, while the agricultural sector faces seasonal labor problems and low productivity. The service and tourism sectors should adopt a sustainable growth model due to the shortage of qualified personnel and the need for digitalization.

Bursa lags far behind the average of Türkiye in terms of employment of people with disabilities. A total of 2,907 people with disabilities were employed in Bursa, of which 2,330 were men and 577 were women. In Türkiye, a total of 35,177 people with disabilities were employed. While the number of people with disabilities employed in the public sector in Bursa is only 1, this number is recorded as 2,906 in the private sector (Table 24). The low rates of employment of people with disabilities indicate that local governments and businesses need to develop more inclusive policies.

As a result, Bursa outperforms the Turkish average in terms of employment rate and labor force participation. The main reasons for this are the strong industry and trade and the continuous demand for labor force. Although unemployment rates are below Türkiye's average, the low employment rates of women and people with disabilities are noteworthy. In this context, various measures need to be taken in order to ensure the supply-demand balance in the Bursa labor market, to close the shortage of qualified personnel needed by the sectors and to increase employment.

These are:

Vocational education curricula should be updated periodically in line with the rapidly changing workforce demands of the industrial sectors in Bursa, and internship and on the job training models that enable students to gain experience in the field should be expanded.

A comprehensive workforce map should be created to identify the skilled labor shortage in the industry and service sectors, and specific training programs should be developed for the missing skill areas.

In order to ensure the sustainability of Bursa's industry, energy efficiency investments in OIZs should be encouraged, green energy projects should be supported and the transition to environmentally friendly production models that will reduce the carbon footprint should be accelerated.

Special training programs should be created to meet the need for workforce in critical sectors such as the automotive and defense industries, and the transition to automation and artificial intelligence-based production processes should be encouraged.

Micro-finance support, mentoring programs and tax incentives for the private sector should be offered to encourage women's entrepreneurship; flexible working models should be expanded to increase women's participation in the workforce.

Due to the low rate of disabled employment in the public sector, quotas for the private sector should be increased and incentive mechanisms should be developed.

To increase Bursa's olive production and agricultural export capacity, producer unions should be strengthened, cooperatives should be encouraged and international marketing channels should be developed.

In order to increase productivity in the agricultural sector, drip irrigation, sensor irrigation and data analytics-based modern agricultural techniques should be made widespread, and working conditions of seasonal agricultural workers should be improved.

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In order to provide logistics support to small and medium-sized farmers, cold storage warehouses and logistics centers for agricultural products should be increased, and low-cost and fast delivery of products to the market should be supported.

In order to increase Bursa's industrial and export capacity, an international logistics center should be established and the railway infrastructure that provides fast freight transportation to automotive production centers should be strengthened.

In order to facilitate transportation to industrial zones in Bursa, public transportation lines should be expanded and special rail system connections should be established for OIZs.

Free digital skills trainings should be organized for the workforce to adapt to digital transformation and R&D investments should be encouraged to increase Bursa's competitiveness in the technology sector.

In addition to winter sports, nature sports, camping, cycling routes and extreme sports activities should be supported by adopting a year-round tourism model in Uludağ, and Bursa's tourism potential should be diversified.

Augmented reality and virtual tour applications should be developed to promote Bursa's historical and cultural richness, and local cuisine culture should be highlighted by organizing gastronomy festivals.

In order to prevent problems arising from the unregistered employment of migrant workers, inspections should be increased, legal procedures should be simplified and mechanisms should be established to encourage the transition to formal employment.

In conclusion, the main characteristics of the labor market in Bursa are that public sector job opportunities are very limited and the private sector bears the burden of employment. Strengthening vocational training programs, increasing digital skills and implementing inclusive employment policies in cooperation with the public and private sectors will support Bursa's sustainable economic growth. In addition, it is crucial for local governments to increase strategic investments in industry, agriculture and services sectors and to find solutions that meet the needs of the labor market. In the long term, regional development policies need to be effectively implemented to increase Bursa's economic diversification and expand employment opportunities.

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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 and Skills	Gender Preference	Attitudes Towards Vulnerable Groups	Attitudes Towards Formal Employment
Automotive	1. Qualified Technical Staff, 2. Assembler 3. Motor Master 4. Lighting Systems Technician	• There is a lack of adaptation to technological developments, insufficient vocational training, decreasing interest of young people in the industry, and problems of adaptation of graduates to the field. • In the automotive supply industry and metalworking sectors, labor shortages are critical in professions requiring technical expertise. • White-collar labor supply is insufficient: There are shortages especially in software specialists and technical engineers. • Lack of labor force suitable for the qualifications demanded: The education system is not in line with sectoral demands.	• CNC operator, • Electricity technician • Energy efficiency expertise, • Welding • Electric hybrid vehicle maintenance technician • Experience and certifications: machine assembly, automotive electronics, hybrid vehicle maintenance. • Engineering and software knowledge: knowledge of software and digital systems is advantageous in the automotive sector. • Problem solving and analytical thinking skills: the ability to detect errors and improve production processes is required.	Male	• Neutral towards women, moderately negative towards migrants • The automotive sector has a male-dominated employment. • Women's employment is lower due to the heavy industrial environment and jobs that require physical strength. • The integration of migrant workers into the automotive sector is limited, mostly in low-skilled jobs.	• Unregistered work is widespread
Textile	1. Production Elements 2. Weaving Operator 3. Paint Shop Workers 4. Flat Sewing Machine 5. Garment Production Specialist 6. Textile Machinery Maintenance and Repair Specialist	• Low wages and harsh working conditions reduce the attractiveness of the sector. • The withdrawal of small-scale firms from the sector creates an imbalance in labor demand. • While the automation of production processes leaves workers with traditional skills unemployed, it creates a labor shortage in areas requiring technical knowledge. • The relocation of textile enterprises abroad has a negative impact on employment in the sector. • Dependence on migrant labor leads to low levels of local labor in the sector.	• Technical knowledge and skills: Knowledge of weaving, sewing, use of textile machinery, maintenance and repair. • Digital competencies: Automation systems, digital production techniques. • Sectoral experience: Experience in areas such as contract manufacturing, dye house operations, garment management.	Female	• The textile sector is an area where women's labor force is dense. • Women often work on garment, sewing, quality control and production lines. • The representation of women in leadership positions is low, women are mostly in blue collar jobs. • Migrant workers are employed in low-paid and labor-intensive jobs. • Women workers with SuTPs adapt quickly to textile work due to their past experience, but may not be preferred by employers due to quality issues in contract manufacturing. • In the event that the migrant labor force returns to their home countries, it is anticipated that there will be a serious labor shortage in the sector.	• The rate of unregistered employment in the textile sector is high, especially in contract manufacturing and small-scale enterprises. • Informal employment of migrant workers is one of the cost reduction strategies of employers.

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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 and Skills	Gender Preference	Attitudes Towards Vulnerable Groups	Attitudes Towards Formal Employment
Agriculture	1. Seasonal Workers 2. Cold Storage Workers 3. Packaging Elements 4. Livestock Workers 5. Greenhouse Specialists	Dependence on migrant labor has reduced local labor's interest in the agricultural sector. With the transition to modern agricultural techniques, the demand for educated and technologically knowledgeable labor force is increasing. Low wages and harsh working conditions reduce the interest of local people in the agricultural sector. The seasonal and temporary work model makes employment continuity difficult. The dominance of traditional methods in agriculture creates a labor shortage in jobs that require technological competence. In the event that the migrant labor force returns to their home countries, it is foreseen that there will be a large labor gap in the sector.	· Basic agricultural knowledge: Fruit and vegetable harvesting, animal husbandry, greenhouse techniques. · Technical competencies: Organic farming, modern irrigation systems, use of agricultural machinery. · Physical endurance: Ability to adapt to demanding working conditions. · Digital skills: Smart agriculture applications, productivity management.	Male	· Female labor is particularly prevalent in fruit and vegetable harvesting and packing, but mostly in low-skilled positions. · Migrant workers are the most commonly employed group in the agricultural sector, working in heavy and low-paid jobs. · There is competition for employment between local and migrant workers, with local workers expecting higher wages and job security. · Seasonal workers' lack of social security creates great inequality in the sector.	· Informal employment in the agricultural sector is widespread, especially among seasonal workers.
Logistics	1. Warehouse Managers 2. Transport Operators 3. Driver 4. Logistics Coordinators 5. Supply Chain Managers 6. E-Commerce Logistics Specialists	· Increased digitalization and automation have increased the demand for a more technical and qualified workforce in the sector. · The rapid growth of e-commerce has created new labor demands in warehouse management and distribution networks. · Lack of skilled labor limits the growth of the logistics sector. · Inadequate logistics training programs and vocational trainings are among the main reasons for the labor shortage in the sector.	· Digital skills: Warehouse management systems, supply chain management software · Technical competencies: Transport and shipment management, inventory control, route optimization. · Bachelor's Degrees and certificates: Certificates in logistics management, supply chain and international transportation.	Female	· Although the presence of female employees in the sector is increasing, male employees are preferred for jobs that require physical strength. · Migrant workers work intensively in low-skilled jobs (loading-unloading, warehouse labor) in the logistics sector.	· While large logistics firms tend towards formal employment, unregistered work may be common in small-scale enterprises.
Energy	1. Renewable Energy Technicians 2. Energy Systems Engineers 3. Energy Efficiency Experts 4. Micro Process Designers	· Rapid increase in renewable energy projects, but insufficient training programs suitable for the sector. · Lack of certified experts in energy efficiency and green transformation. · Slow progress in training energy experts in response to the increasing demand for energy in the industrial sector. · Vocational education and university-industry collaborations are not sufficiently developed.	· Technical skills: Installation and maintenance of renewable energy systems, installation of solar panels, wind turbine maintenance. · Knowledge of energy management: Developing energy efficiency strategies in industrial facilities. · Digital competencies: Smart energy systems, automation and micro-process design. · Certificates VQA (Vocational Qualifications Authority) certified energy specialist, renewable energy engineer	Male	· The energy sector has predominantly male employees, but female employment is increasing in green energy and digitalized business areas. · Migrant employment in the energy sector is low because the sector often requires technical expertise.	· Formal employment widespread

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Sector	Labor Shortage	Causes of Labor Shortage	Expected Qualifications and Skills	Gender Preference	Attitudes Towards Vulnerable Groups	Attitudes Towards Formal Employment
Construction	1. Craftsmen and Technical Staff 2. Body Workers	• Construction work is physically demanding and dangerous, which reduces the interest of the local labor force in this field. • Inadequate vocational training programs make it difficult to train qualified personnel.	• Civil Engineering • field experience • Construction know-how • Manual dexterity and physical endurance	Female	• The construction sector relies heavily on male labor. • Migrant workers are employed for low wages in the construction sector. • If migrant workers return to their home countries, there could be huge labor shortages in the sector, leading to disruption of construction projects.	• Informal work in the construction sector is widespread, especially for low-skilled workers. • Employers prefer informal employment to avoid social security contributions and other legal obligations.
Tourism	1. Qualified Guide 2. Hotel Staff 3. Restaurant Workers (Waiters, Kitchen Staff, Cooks) 4. Receptionists 5. Health Tourism Specialists	• The increasing number of tourists in Uludağ winter tourism, thermal tourism and cultural tourism increases the need for qualified labor force. • The seasonal employment model makes it difficult to provide a permanent workforce. • In the tourism sector, shift work and transportation problems prevent employees from turning to this field.	• Foreign language skills: Tourism employees are expected to have a good command of at least one foreign language. • Customer service competencies: Communication skills to ensure guest satisfaction in the hospitality, restaurant and tourism sectors. • Technical skills: Hotel management, tourism guidance, use of reservation systems. • Certificates Professional certificates in fields such as tourism management, cookery, hospitality management.	Female/ Male	• The proportion of female employees is high in the hotel management, reception, restaurant and service sector. • The employment of migrant workers in the tourism sector is particularly concentrated in low-skilled jobs (such as cleaning, kitchen staff, transportation).	• Formal employment is preferred

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