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## Comprehensive Analysis of Labor Market, Voluntary Return Intentions, and Green Economy Dynamics

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*ULUSLARARASI GÖÇ VE DAYANIŞMA DERNEĞİ - INTERNATIONAL MIGRATION AND SOLIDARITY ASSOCIATION*

*ADDRESS: AŞKAN MAH. SANCAKTAR CD. NO: 52 MERAM / KONYA*

*PHONE: 0(332) 324 00 52 - MAIL: [info@ugdd.org.tr](mailto:info@ugdd.org.tr) - WEBSITE: [www.ugdd.org.tr](http://www.ugdd.org.tr)*



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ADDRESS: AŞKAN MAH. SANCAKTAR CD. NO: 52 MERAM / KONYA

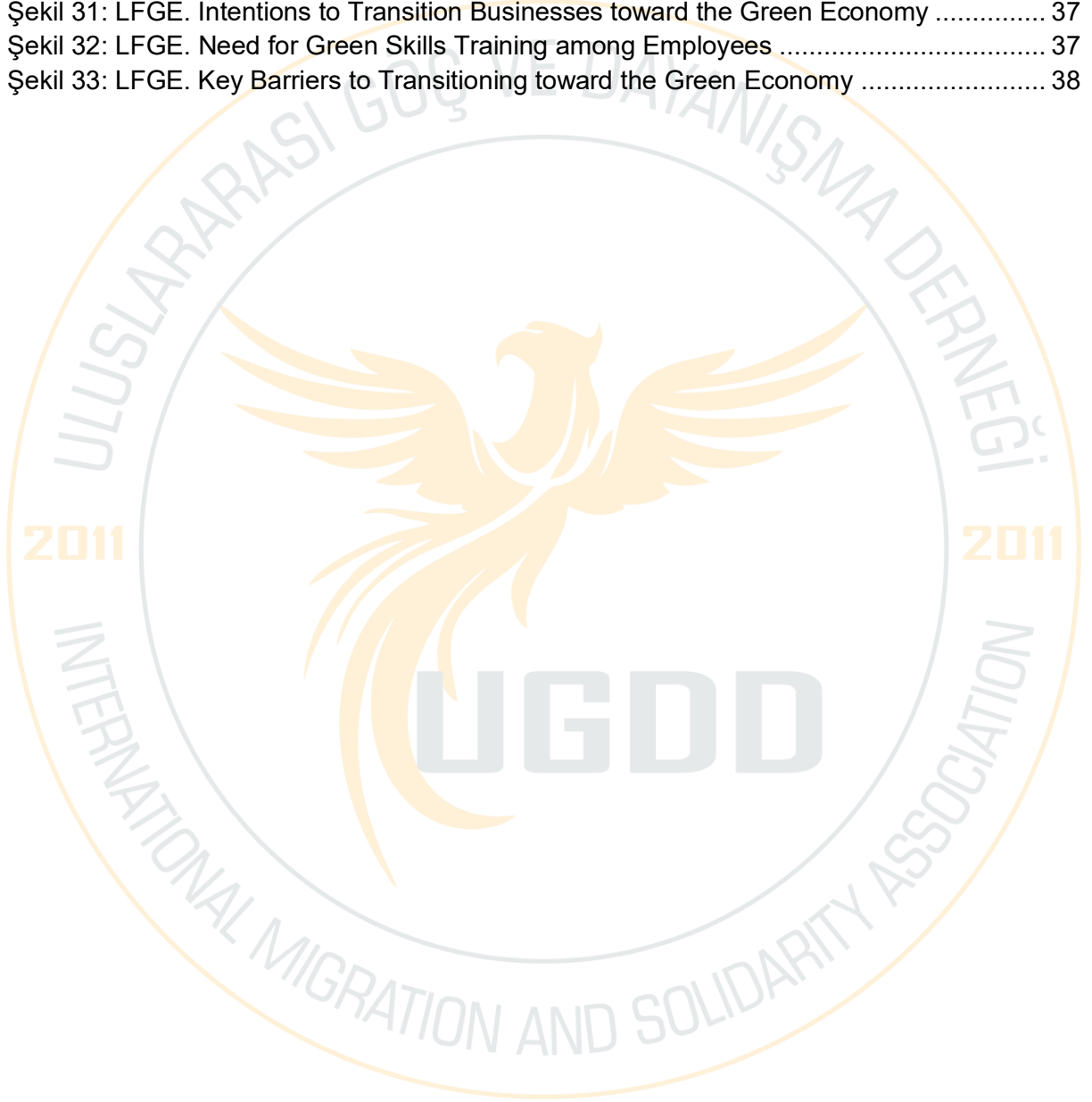
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## PROJECT OVERVIEW:

This study was carried out to analyze the socio-economic status of Syrians living in Türkiye. **The study focuses** on key areas such as the labor market, the green economy, the situation of Syrian business owners, and the operational and legal challenges faced by businesses and employees. The research aims to provide a deeper understanding of economic and occupational **realities** and to identify the opportunities and challenges that affect livelihoods and economic stability.

Within the scope of the study, Syrians' access to the labor market, the sustainability level of enterprises, the legal and regulatory frameworks affecting companies and employees, and the level of awareness and implementation of green economy concepts **were examined**. In addition, Syrians' future tendencies to remain in Türkiye or return to Syria, as well as the factors influencing these decisions, were analyzed.

By using both quantitative and qualitative data, this study aims to provide reliable and evidence-based information for policymakers and relevant stakeholders. The findings are intended to support the design of more effective interventions and programmes that strengthen decent work opportunities, increase economic resilience, and contribute to sustainable and inclusive economic development.

## METHODOLOGY:

This study was conducted within the framework of a structured research methodology. The process began with the design of the survey tool in line with the objectives and main focus areas of the study, followed by the identification of target groups and the preparation of participant lists for survey implementation. Subsequently, data were collected through survey administration, with due consideration given to the principles of accuracy and comprehensiveness.

Following the completion of the data collection process, the findings were analyzed using Microsoft Excel. Appropriate quantitative analysis methods were applied to identify key indicators and to understand overall trends within the data. In the final stage, the results were documented in a comprehensive report intended to serve as a guiding resource for policymakers and relevant stakeholders

### ➤ **Sampling Approach:**

This study was carried out using a systematic sampling approach targeting Syrians living in Türkiye. Within the scope of the study, different groups including employed individuals and business owners were included. The sampling framework was developed in line with the objectives and main focus areas of the research, and lists of potential participants were prepared to ensure adequate representation of diverse demographic and economic groups.

The data collection process was conducted using a purposive sampling method to ensure the inclusion of individuals directly related to the study topics. Through this approach, diverse perspectives were obtained on the labor market, challenges faced by business owners, legal frameworks, the green



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economy, and Syrians' future plans regarding remaining in Türkiye or returning to Syria. This method enhanced the reliability and validity of the findings.

#### ➤ Data Collection and Analysis:

The data collection process is one of the key components of this study, conducted through a structured questionnaire covering the main themes of the research. The questionnaires were systematically applied to the selected sample group; The principles of consistency and accuracy were adhered to in the data collection process and ethical standards were adhered to.

After the completion of the data collection process, the data obtained was reviewed and cleaned using Microsoft Excel. This process; It includes checking data accuracy, removing duplicate records, addressing missing values, and correcting potential errors. Then, the data were organized by taking into account demographic variables such as age, gender and geographical location, and basic indicators and general trends were determined using descriptive analysis methods. The results of the analysis are included in this report in order to provide evidence-based findings and actionable recommendations.

## KEY FINDINGS:

### EMPLOYER SURVEY(ES):

- Gender and Age: 77% of the participants were male and 21% were female, and the rate of participants who did not specify or could not determine their gender was limited to 2%. In the age distribution, the 35-44 age group was 49%, the 45-60 age group was 28%, the 25-34 age group was 19%, and the 60 and over age group was 3%.
- Education Level: The high rate was determined as 34% for high school graduates, 32.3% for university graduates, 19.1% for secondary school graduates, 6.4% for primary school graduates, 3.0% for literate graduates, 3.8% for master's graduates and 1.3% for illiterate graduates.
- Nationality and Legal Status: Temporary protection status constituted the highest rate with 71.8%, while dual citizens accounted for 18.1%, long-term residence 3.8%, family residence certificate 2.9%, registered persons with suspended legal status 1.3%, and unspecified situations 0.8%. In addition, student residence permits, tourist residences and expired work permits are represented by 0.4% each.
- Types of Housing by Provinces: Rental housing is the dominant form of housing among Syrians, 100% in Bursa and Istanbul, 91% in Adana, 87% in Gaziantep, 76% in Hatay, 93% in Kilis, 91% in Sanliurfa. While the highest housing ownership rate is 24% in Hatay, it is 13% in Mersin and 10% in Gaziantep. The rate of staying with relatives was 4%, and the rate of those who did not want to respond was 13% in Mersin.
- Household Income Structure: Self-employment is the most dominant source of income for households, particularly concentrated in middle and high-income groups. Paid, daily and seasonal jobs are predominantly seen in income groups at or below the minimum wage and indicate income insecurity. Social assistance is often used as a complementary source of income.



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- Participation and Adaptation to Social Life in Türkiye: While 58% of the participants stated that they adapted to social life in Türkiye, 28% partially and 14% stated that they could not. The main obstacles in the adaptation process are; language barrier, discrimination, economic difficulties, security concerns and spatial distance.
- Structure and License Status of Enterprises: Most Syrian-owned enterprises are micro-scale (1–9 employees) and operate mainly in trade (92%) and production/industry (91%); 78% of enterprises are legally registered, only 22% carry out unregistered activities.
- Challenges Faced by Business Owners: Syrian business owners have the most difficulty in accessing finance (43%), legal processes (24%), and market access (23%).
- Support Needs of Business Owners: The primary support needs of businesses are loans/financing (45%) and facilitating tax and permit processes (30%).
- Barriers to Women's Participation in the Workforce: Women's participation in the workforce remains limited by structural and societal barriers such as working hours (20%) and societal norms (15%), particularly working conditions (31%) and childcare responsibilities (24%).
- Tendency of Businesses to Continue in Türkiye: 63% of Syrian business owners plan to continue their businesses in Türkiye.
- Visits to Syria: 40% of the participants visited Syria with the permission of the governor's office, 54% did not.
- Impact of Visits on the Decision to Return: 39% of visits to Syria strengthened the desire to return, while 23% decreased it; 21% were ineffective, 17% were undecided

#### **Household Return Intention(HHRI):**

- Female participants constitute the majority of the sample (63%), followed by males (36%), while only 1% of respondents preferred not to disclose their gender, indicating higher female participation at the household level.
- Most participants fall within economically active age groups, led by those aged 25–34 (46%), followed by 35–44 (21%) and 45–60 (18%); younger participants aged 18–24 account for 11%, while those aged 60 and above represent only 4% of the sample.
- Most participants have secondary or higher education, led by university graduates (31.9%) and high school graduates (21.4%), followed by middle school (17.7%) and primary school education (15.8%), while lower education levels—including illiteracy (4.8%), literate without schooling (4.3%), postgraduate education (3.0%), other levels (0.8%), and unspecified education (0.3%)—remain comparatively limited.
- The sample is predominantly composed of Syrian nationals (94.4%), followed by Turkish citizens (3.8%) and dual citizens (1.1%), while 0.8% of participants did not report their nationality.
- Temporary Protection is the predominant legal status among participants (82.0%), followed by dual citizenship (8.9%) and Family Residence Permits (3.2%), while smaller shares are distributed across unregistered individuals (1.1%), suspended registrations (0.7%), student residence or permits (1.6% combined), tourist residence permits (0.7%), long-term residence permits (0.5%), humanitarian residence permits (0.3%), and other or unspecified statuses (below 1%).
- Rental housing overwhelmingly dominates accommodation arrangements (86.9%) across all provinces, with the highest concentrations in Mersin (22.5%), Hatay (19.3%), and Gaziantep (16.1%), while home ownership (3.5%) and all other housing types together account for a small minority of households.
- Household incomes are primarily driven by daily labor (27.9%), insured employment (25.1%), and uninsured employment (19.1%), while a notable share of households report no income (12.6%) and rely on social assistance (10.7%), reflecting widespread income instability.

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ADDRESS: AŞKAN MAH. SANCAKTAR CD. NO: 52 MERAM / KONYA

PHONE: 0(332) 324 00 52 - MAIL: [info@ugdd.org.tr](mailto:info@ugdd.org.tr) - WEBSITE: [www.ugdd.org.tr](http://www.ugdd.org.tr)



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- More than half of participants report successful adaptation to social life in Türkiye (55.0%), while 26.2% indicate partial adaptation and 18.8% report no adaptation, highlighting persistent barriers to full social integration.
- Over the next 12 months, the majority of participants plan to remain in Türkiye (64.9%), while 20.4% intend to return to Syria; a further 11.1% remain undecided, and only small shares plan to move to a different province (1.1%) or migrate to a third country (2.4%).
- Looking ahead five years, intentions are evenly split between returning to Syria (38.0%) and staying in Türkiye (38.0%), while 18.3% of participants remain undecided; plans to move to another province (1.6%) or relocate to a third country (4.1%) continue to represent limited proportions.
- A minority of participants reported visiting Syria with the governor's permission (19.1%), while the majority did not undertake such a visit (80.9%).
- Among participants who visited Syria, 39.7% reported that the visit strengthened their desire to return, 25.0% stated that it reduced their desire to return, 32.4% indicated no effect or remained undecided, and 2.9% reported other effects, indicating that the visit influenced return intentions in both positive and negative ways.
- Most respondents believe that basic services in Syria are either partially available (53.7%) or not available at all (35.2%), while only a small minority (11.1%) consider them fully available.
- Most participants perceive the security situation in Syria as uncertain (42.1%) or unsafe (38.5%), while less than one-fifth consider it safe (19.4%), underscoring significant security-related barriers to return.
- The majority of respondents (54.2%) primarily need financial support to rebuild their lives in Syria, followed by combined needs for financial support and relocation costs (23.4%). Additional combined needs include financial support with counseling (8.9%) and relocation costs alone (4.2%), while counseling only represents (3.3%). All other mixed or unspecified support needs remain below (3%), indicating that economic assistance—often alongside relocation support—is the dominant pre-return requirement.

#### **Labor Force and Green Economy(LFGE):**

- The gender distribution shows a strong predominance of male participants within the sample. 82.8% men, while 16.7% are women. Only 0.6% preferred not to disclose their gender. This imbalance suggests that the findings largely reflect male perspectives, which may be influenced by gendered roles in labor force participation, availability during data collection, or decision-making dynamics at the household level.
- The age distribution indicates that the sample is overwhelmingly composed of individuals in economically active age groups. The largest proportion of participants falls within the 35–44 age group, accounting for 53.6%, followed by the 25–34 and 45–60 age groups, each representing 21.9%. Younger adults aged 18–24 constitute only 1.6% of the sample, while participants aged 60 and above account for 1.1%.
- The sample is overwhelmingly composed of Syrian nationals, who account for 92.9% of respondents, while Turkish citizens represent only 1.1%. A further 6.0% of participants did not specify their nationality, confirming the predominantly Syrian profile of the surveyed population.
- Temporary Protection is the dominant legal status, covering 73.6% of participants, followed by dual citizenship holders at 20.1%. Family Residence Permit holders and Long-Term Residence Permit holders each account for 2.3%. Smaller shares include



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individuals registered with suspended status (0.6%), unregistered individuals (0.6%), and Student Residence Permit holders (0.6%), indicating that while legal statuses vary, the vast majority remain concentrated within Temporary Protection and dual citizenship frameworks.

- Rental housing overwhelmingly dominates accommodation arrangements among Syrian households (90.2%), indicating a strong dependence on the private rental market, while home ownership remains limited (8.7%) and alternative housing options—such as staying with relatives or living in tents/makeshift shelters (0.6% each)—are marginal. Geographically, rental housing is highly concentrated in Hatay (23.0%), Mersin (22.4%), Kilis (22.4%), Sanlıurfa (22.4%), and Adana (21.9%), with minimal presence in Gaziantep (3.8%) and Istanbul (0.5%), underscoring widespread reliance on rental accommodation across provinces.
- Household incomes are overwhelmingly driven by own business activities (78.1%), underscoring strong reliance on self-employment as the primary livelihood strategy. Regular insured (8.9%) and uninsured employment (6.5%) remain limited, while daily labor (7.1%) reflects continued income instability for a segment of households. Seasonal work (1.2%) and households with no income source (1.8%) are marginal but indicate persistent economic vulnerability among the most at-risk groups.
- The business landscape is overwhelmingly dominated by micro-enterprises (1–9 employees), which account for 84.9% of all establishments. Small enterprises (10–49 employees) represent a much smaller share at 9.3%, while medium-sized enterprises (50–249 employees) are extremely limited at 1.2%, indicating minimal business scaling and restricted employment generation capacity. A further 4.7% of respondents did not specify enterprise size.
- Economic activities are primarily concentrated in trade-related sectors (36.6%), underscoring the central role of commerce in household livelihoods. The services sector follows with a combined share of 23.2%, while production/industry accounts for 14.0%, reflecting moderate engagement in manufacturing activities. Agriculture remains marginal at 4.1%, and other sectors represent 18.0%, indicating some diversification beyond the main economic categories. Unspecified sectors account for 4.1% of responses, overall highlighting an economic structure strongly oriented toward trade and services with limited participation in productive and agricultural sectors.
- The workforce in surveyed companies and institutions is predominantly Syrian (85.8%), with Iraqis (12.3%) constituting a notable minority, while Turkish (1.3%) and Iranian (0.6%) workers remain marginal.
- Perceived opportunities within the green economy are strongly concentrated in recycling (48.7%) and sustainable agriculture (28.9%), while renewable energy (17.1%) and green construction (5.3%) remain less prominent, pointing to a preference for more accessible and familiar green sectors.
- While only 27.3% of businesses express a definite plan to transition to green economy sectors, a substantial 59.7% show partial interest, highlighting significant potential for engagement if enabling conditions—such as technical support, financing, or awareness—are strengthened; outright reluctance remains limited at 13.0%.



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- A strong majority of businesses (88.3%) report either full (36.4%) or partial (51.9%) need for green skills training, underscoring significant demand for capacity-building initiatives to support transition toward green economy practices.
- The transition to the green economy is primarily constrained by financial barriers (40.3%), information gaps (29.9%), and technical infrastructure limitations (22.1%), while regulatory issues (3.9%) and labor shortages (2.6%) play a comparatively minor role—pointing to the need for targeted financing, awareness, and technical support.

## FINDINGS:

### EMPLOYER SURVEY(ES):

This section presents the key findings from the survey for business owners. The survey aims to understand the economic and operational situation of business owners, the challenges they face in running their business, their level of compliance with legal and regulatory frameworks, and their ability to capitalize on opportunities in the labor market and green economy. In addition, the findings; It reveals information about demographic characteristics such as nationality, age group, gender, educational background and cities of residence of the participants.

In addition, the findings provide information about the size and fields of activity of enterprises and projects; Sustainability plans include intentions to grow or expand businesses and details on the potential to hire additional workforce. This data provides an analytical basis for developing inferences and recommendations to strengthen the sustainability of businesses and improve the business environment.

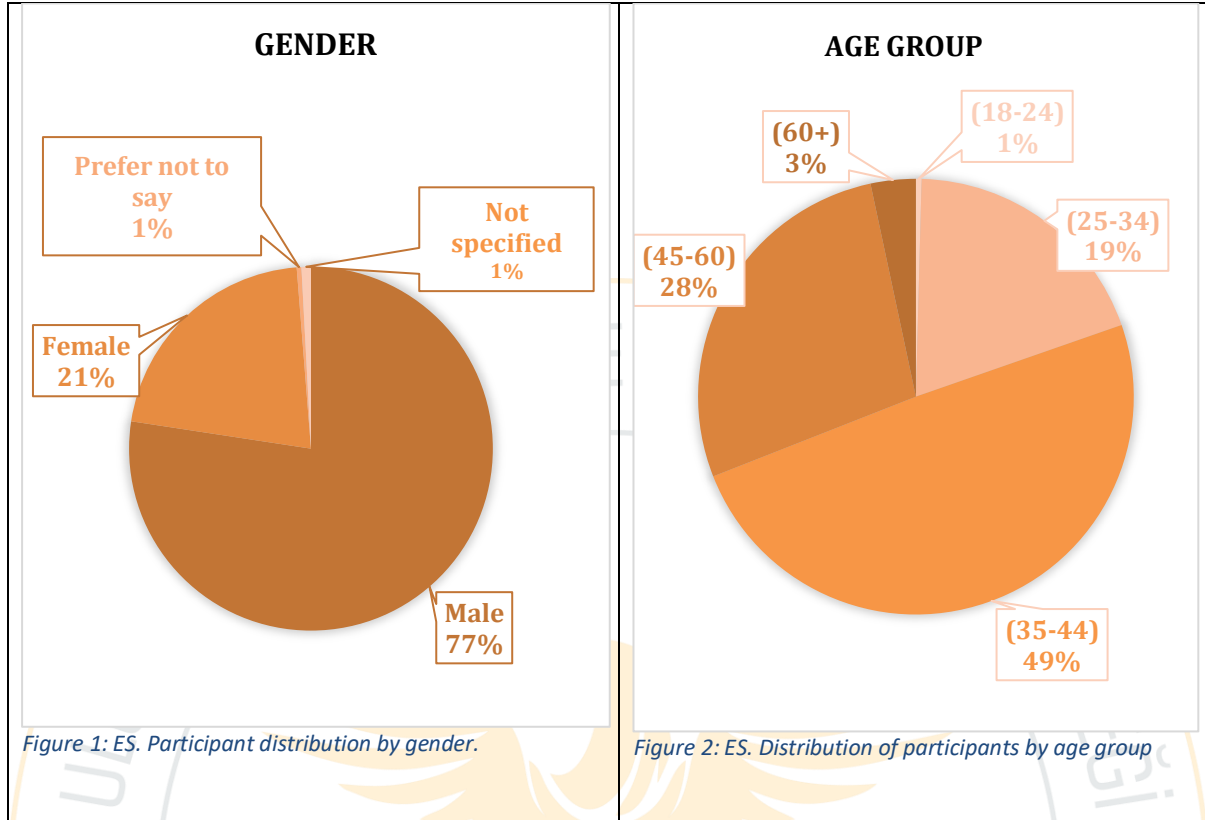
#### ➤ Gender and Age Groups:

The findings regarding the distribution by gender show that males were significantly dominant in the sample. 77% of the participants were male and 21% were female, and the rate of participants who did not specify or could not determine their gender was limited to 2%. This distribution indicates a gender gap, which may be related to the nature of certain economic activities or structural challenges limiting women's participation in certain sectors and labor markets.

When we look at the age groups, it is seen that the participants are largely concentrated in economically active age groups. The 35–44 age group has the highest share with 49%, followed by the 45–60 age group with 28%. This distribution shows that a significant part of the participants have a high level of professional experience and relative stability in business life; This situation has a direct impact on the sustainability of business and economic decision-making processes.

In contrast, the proportion of respondents aged 25–34 remained moderate at 19%, while respondents aged 60 and over were represented by only 3%. This indicates that older age groups may have a lower rate of participation in economic activities or data collection processes.

*Details of these findings can also be visually examined through the charts below.*



### ➤ Education Level:

When the education levels of the participants are examined, it is seen that the majority of them have medium and high education levels. While the **highest rate is 34% in high school graduates, university graduates follow this group closely with 32.3%**. This shows that most of the participants have an educational infrastructure that can contribute to business life and business management.

**While secondary school graduates are represented by 19.1%, the rate of primary school graduates is 6.4%**. Lower education levels were limited; those who did not go to school but **were literate were 3.0%, master's graduates were 3.8% and illiterate were 1.3%**.

Overall, the results reveal that the majority of the sample has basic and advanced education levels, which positively supports business processes and decision-making mechanisms.

### ➤ Nationality and Legal Status:

The survey results show that the majority of respondents have a clear legal status in Türkiye. Temporary Protection status accounts for the highest proportion at 71.8%, while dual nationals account for 18.1%, reflecting legal stability and compliance in a significant portion of the sample.

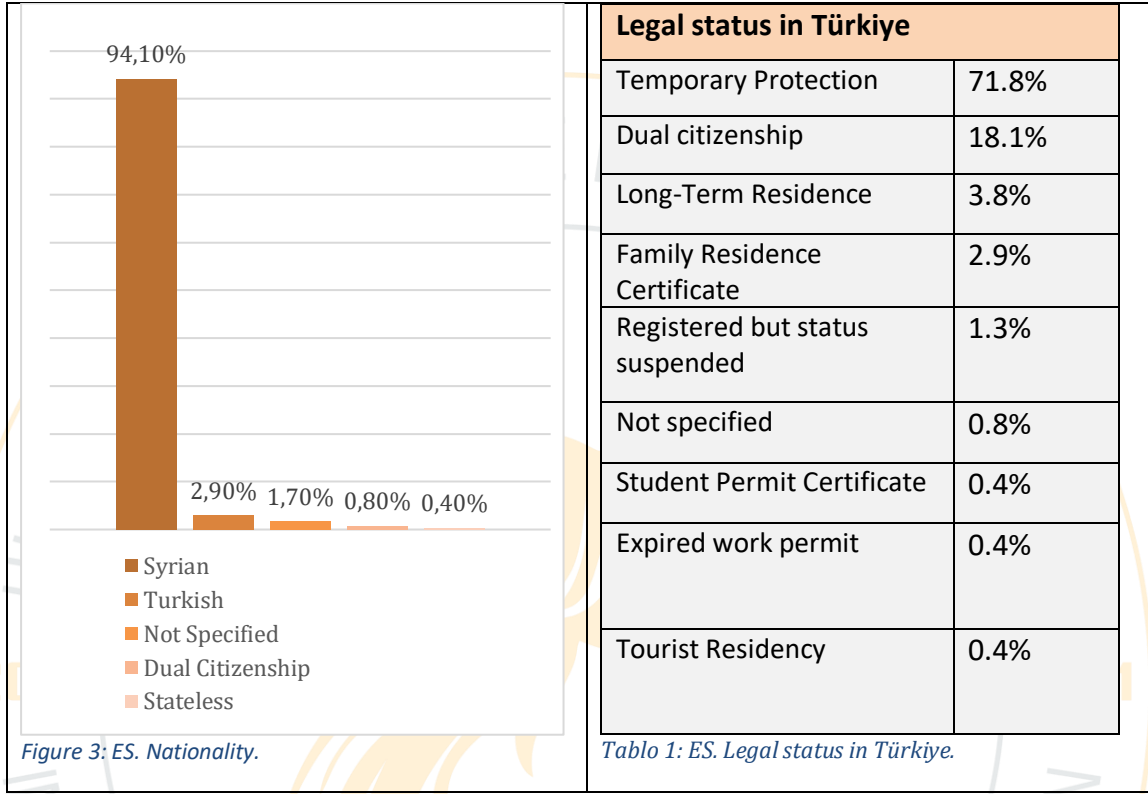
Other statuses are distributed at lower rates: long-term residence 3.8%, family residence certificate 2.9%, registered persons with pending legal status 1.3%, and unspecified statuses 0.8%. In addition, student residence permits, tourist residences and expired work permits are represented by 0.4% each.

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This distribution shows that there is diversity in legal status, but temporary protection is significantly dominant; This has a direct impact on employment opportunities, economic stability, and long-term planning.

Details of these findings can also be visually examined through the charts below.



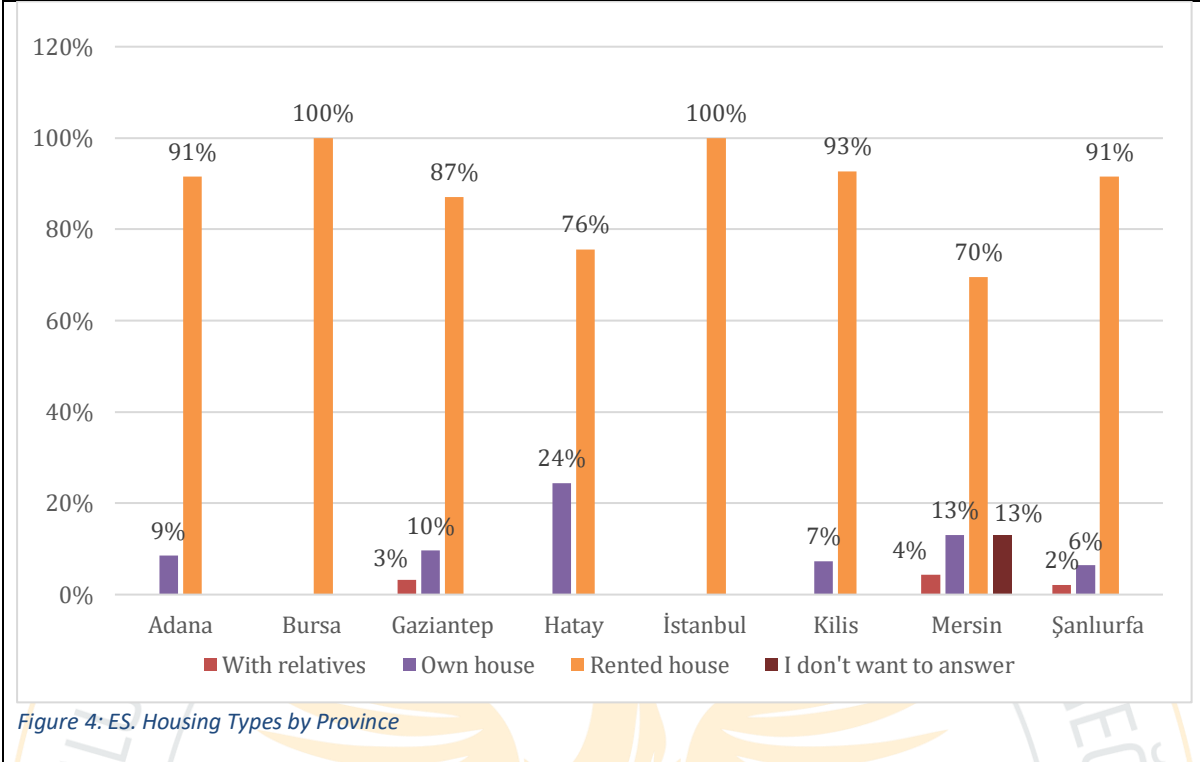
Legal status in Türkiye	
Temporary Protection	71.8%
Dual citizenship	18.1%
Long-Term Residence	3.8%
Family Residence Certificate	2.9%
Registered but status suspended	1.3%
Not specified	0.8%
Student Permit Certificate	0.4%
Expired work permit	0.4%
Tourist Residency	0.4%

Tablo 1: ES. Legal status in Türkiye.

#### ➤ Housing Types by Provinces:

The results of the research show that rental housing is the dominant form of accommodation among Syrians in all provinces included in the study. While this rate is **100% in Bursa and İstanbul**, it is also quite high in **Adana (91%), Gaziantep (87%), Hatay (76%), Kilis (93%) and Şanlıurfa (91%)**. In contrast, **the rate of home ownership is relatively low**, with the highest rate in **Hatay (24%)**, followed by **Mersin (13%) and Gaziantep (10%)**. This may reflect **differences in living costs or settlement time between provinces**. The rate of staying with relatives remains quite limited, not exceeding 4%, indicating that despite economic challenges, households are largely **shifting towards independent housing solutions**. In addition, **the proportion of those who do not want to respond** is almost non-existent except in Mersin (13%), which **may be related to sensitivity to housing situation or housing insecurity** in the province in question.

Details of these findings can also be visually examined through the charts below.



### ➤ Household Income Structure:

According to the results of the research, owning one's own business stands out as the most dominant source of income in the income structure of households. The high number of people earning income from their own business, especially in the 50,001-75,000 TL income group (52 households) and in the minimum wage-50,000 TL range (50 households), shows that entrepreneurship is an important livelihood strategy for households. In the income group of 75,001 TL and above, the number of those who earn income from their own business (20 households) is remarkable. On the other hand, regularly insured and uninsured jobs are mainly concentrated in income groups at or below the minimum wage, indicating that paid employment is limited in terms of income increase. Daily and seasonal jobs are especially common among households earning below the minimum wage and are considered an important indicator of income insecurity. Furthermore, it is observed that social assistance is generally used as a secondary or complementary source of income, while subsistence based on social assistance alone is quite limited. Overall, the picture reveals that household incomes rely heavily on fragile and unstable income sources, and economic security is weak, especially in low-income groups.

Details of these findings can also be visually examined through the charts below.

Income Sources of the Household	Total Revenue			
	50,001 – 75,000 TL	75,001 TL and over	Minimum wage – 50,000 TL	Below the minimum wage (22,104.20 TL)
Regular work (Insured)	4	7	14	4

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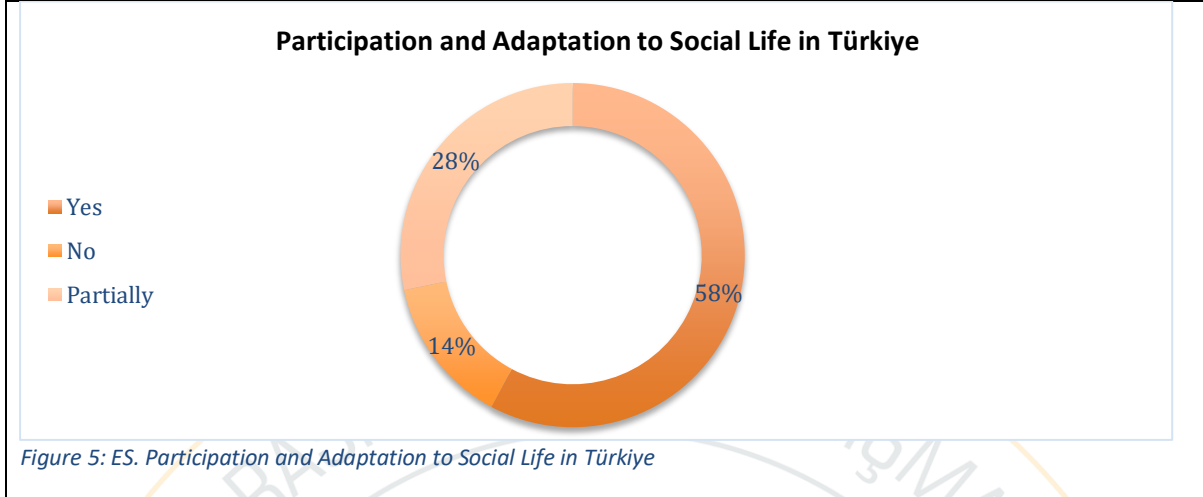
Regular work (Insured), Regular work (Without insurance), Casual work, Seasonal work, Self-employment, Social assistance	0	0	0	1
Regular job (Insured), Regular job (Without insurance), Social assistance	1	0	0	0
Regular work (Insured), Casual work	0	0	1	0
Regular work (insured), Self-employment	0	4	0	1
Regular work (insured), Social assistance	0	0	1	0
Regular job (Without insurance)	3	0	11	4
Regular job (Without insurance), Self-employment	0	1	0	1
No source of income	0	1	2	0
Casual business	2	0	5	7
Casual job, Self-employment	0	2	6	0
Self-employment	52	20	50	15
Self-employment, Other	0	0	0	1
Self-employment, Social assistance	0	0	0	1
Seasonal work	1	0	0	2
Social assistance	1	0	1	1
Other	0	1	2	3

*Tablo 2:ES. Household Income Structure*

### ➤ Participation and Adaptation to Social Life in Türkiye:

According to the results of the research, 58% of the participants stated that they could adapt to social life in Türkiye, while 28% stated that adaptation was partially achieved, and 14% stated that they could not adapt. These findings show that a significant portion of Syrians have achieved a certain level of adaptation in terms of participation in social life, but a significant portion still has difficulties in the adaptation process. The main reasons for the inability to adapt to society are; The language barrier, accompanying discrimination, economic difficulties, security concerns and spatial factors such as the distance of residences and workplaces are intertwined with each other and limit active participation in social life.

Details of these findings can also be visually examined through the charts below.



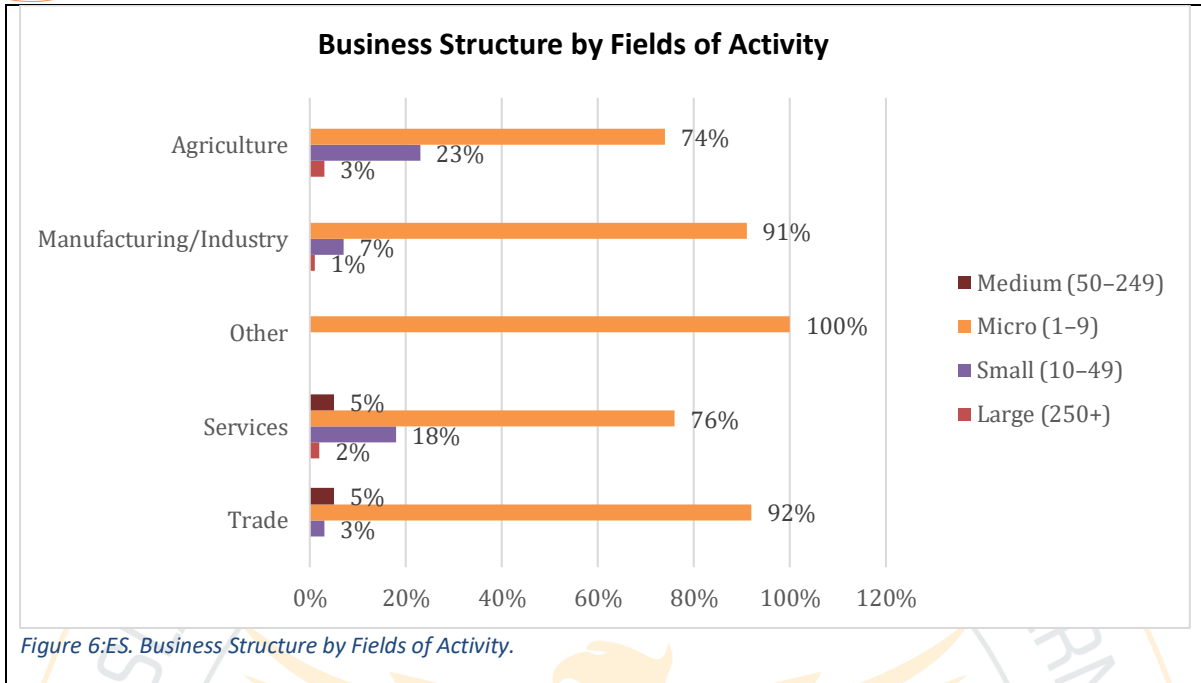
➤ **Business Structure and License Status by Fields of Activity:**

According to the results of the research, it shows that the majority of enterprises are micro-scale (1–9 employees) and this structure is dominant in all sectors according to their fields of activity. Especially in the areas of trade (92%), production/industry (91%) and other activities (100%), micro-enterprises are prominently prominent. Although micro-enterprises constitute the majority in the service and agriculture sectors, it is seen that the proportion of small-scale enterprises is relatively higher in these areas (18% in services, 23% in agriculture). The proportion of medium and large-scale enterprises remains quite limited in all sectors, which reveals that Syrian-owned enterprises are generally small-scale, fragile and have a limited growth capacity.

In addition, it has been determined that 78% of the enterprises are licensed and legally registered, while 22% operate unregistered. These findings suggest that Syrian-owned enterprises, while predominantly small-scale, largely operate within the legal framework.

Details of these findings can also be visually examined through the charts below.

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➤ **Challenges Faced by Business Owners, Support Needs, and Barriers to Women's Participation in the Workforce:**

The research findings show that the main challenges faced by Syrian business owners are centered around access to finance (43%), legal processes (24%), and market access (23%). In addition, access to qualified labor (9%) stands out as an important factor limiting the growth and sustainability capacity of businesses.

In parallel with these challenges, it is seen that the areas where business owners request the most support are loans and financing (45%) and facilitation of tax and permit processes (30%). Access to new markets (23%) was also expressed as an important need for businesses to increase their revenues and expand their activities.

**Inappropriate** working conditions (31%) are the top reasons for limited women's participation in the workforce, followed by childcare responsibilities (24%) and long or inflexible working hours (20%). In addition, social norms (15%) stand out among the factors that significantly restrict women's participation in working life. Lack of education (5%) and other reasons (4%) were expressed at lower rates. These findings suggest that women's participation in employment is limited by both structural and societal barriers.

Details of these findings can also be visually examined through the charts below.

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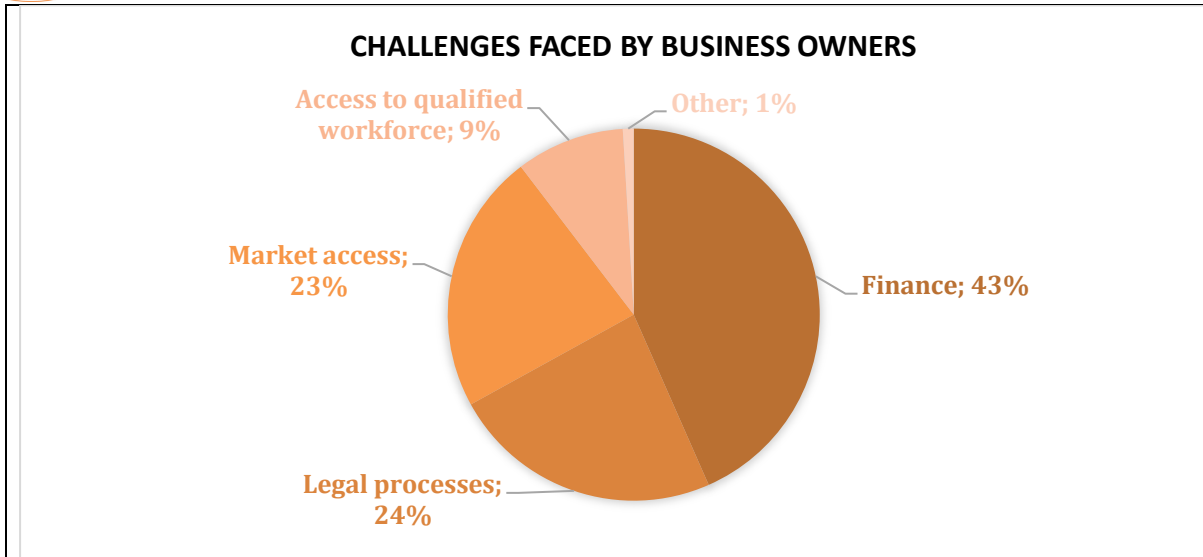


Figure 7:ES. Challenges Faced by Business Owners

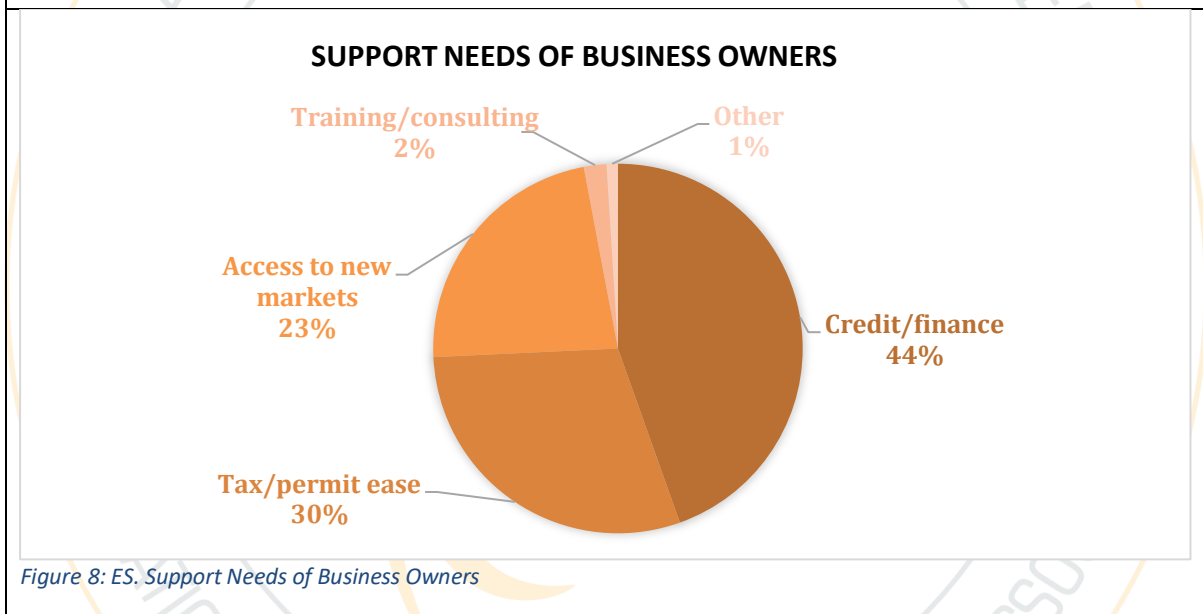


Figure 8: ES. Support Needs of Business Owners

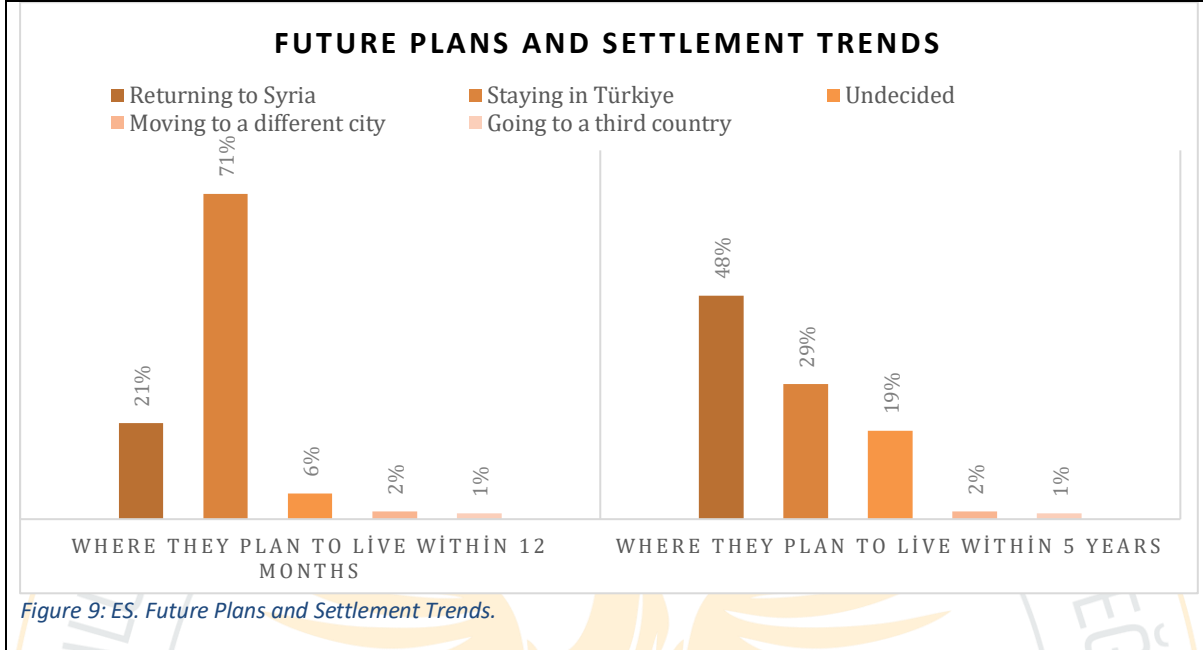
➤ **Future Plans and Settlement Trends:**

The research findings show that there are different trends in the short and medium-term future plans of the participants. Regarding where they plan to live in the next 12 months, 71% of respondents stated that they plan to stay in Türkiye, 21% to return to Syria, 6% are undecided, 2% plan to move to a different province and 1% plan to go to a third country.

On the other hand, when it comes to where they plan to live in 5 years, 48% of respondents plan to return to Syria, 29% to stay in Türkiye, 19% to be undecided, 2% to move to a different province and 1% to go to a third country. These findings reveal that the tendency to stay in Türkiye is dominant in the short term, while the perception of uncertainty and return to Syria increases in the long term. The

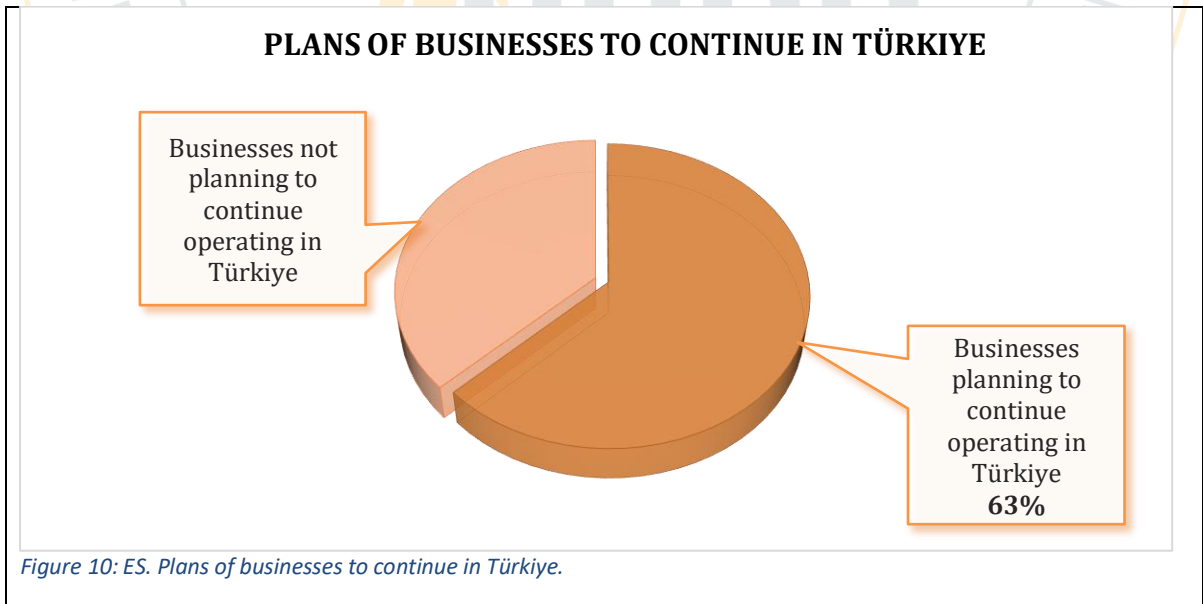
other options, such as moving to a different province and going to a third country, are limited in both time periods.

Details of these findings can also be visually examined through the charts below.



Participants were asked, "Do you plan to continue your business in Türkiye?" When the question was asked, **63% of business owners stated that they intend to continue their businesses in Türkiye**, while **37% stated that they do not plan to continue them**. This finding suggests that the majority of Syrian business owners tend to continue doing business in Türkiye, but a significant portion still experiences uncertainty.

Details of these findings can also be visually examined through the charts below.



When the participants were asked the question "Were there any visits to Syria with the permission of the governor's office?", **40% of the participants stated that they visited, 54% did not visit, and 6%**

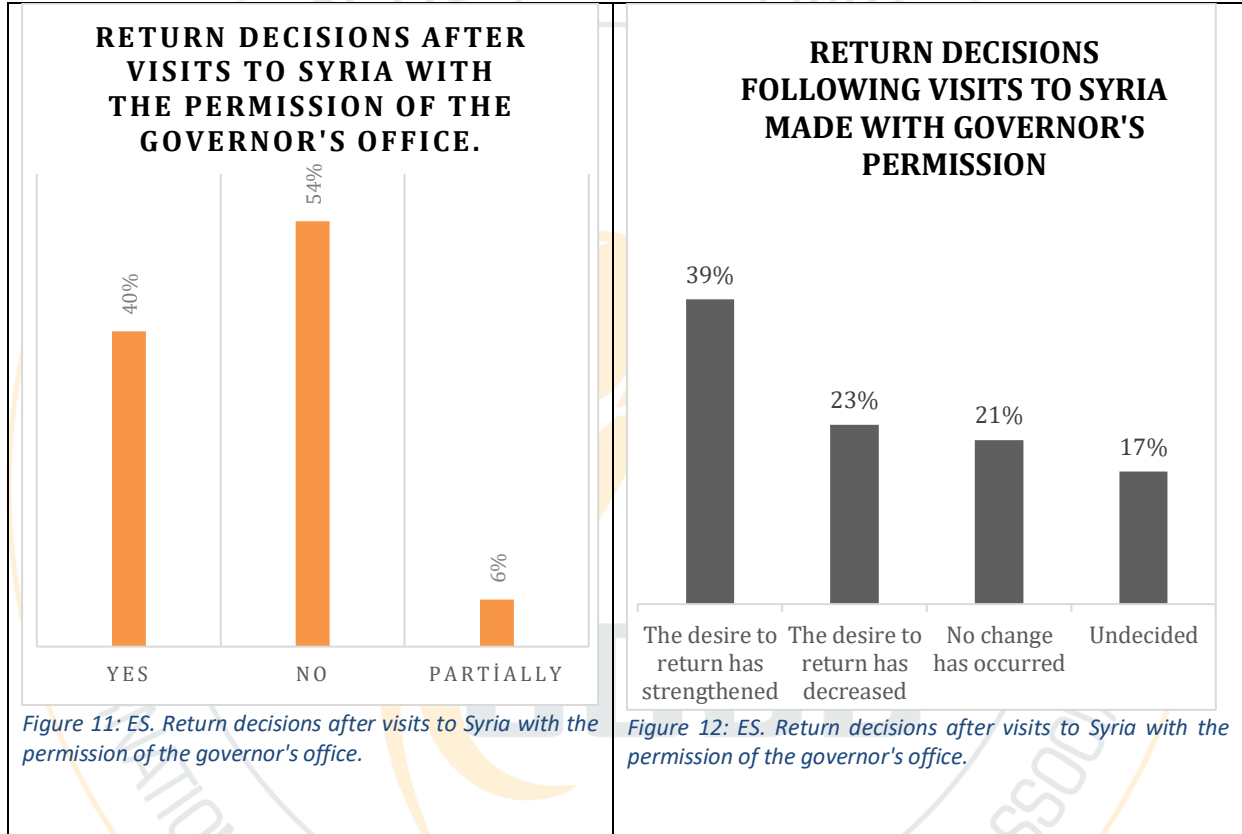
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**stated** that they visited partially. These results reveal that Syrians have shown a largely limited participation in visits to Syria and that more than half of them have not yet visited with official permission.

When respondents were asked how their decision to return to Syria after a visit with governor's permission was affected, the responses showed different trends. 39% of respondents **stated that the visit strengthened their desire to return, 23% decreased their desire to return, 21% stated that there was no change, and 17%** stated that it was undecided or ineffective. These results reveal that visits to Syria influenced the decision of most respondents to return, but their effects were distributed in both positive and negative ways.

*Details of these findings can also be visually examined through the charts below.*



### Household Return Intention(HHRI):

The survey results reflect Syrian households' intentions to return to their country of origin, serving as a key indicator for understanding future trends among Syrian refugees and the factors influencing their decisions regarding return or continued settlement. These intentions demonstrate a complex interaction between security, economic, and social conditions in the country of origin, as well as living conditions, employment opportunities, and levels of integration in the host country. Analyzing return intentions provides an evidence-based foundation for policymakers and relevant stakeholders to design interventions and policies that effectively address the needs of Syrian households, whether in

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relation to voluntary return programs or the enhancement of livelihoods and stability in current places of residence.

#### ➤ **Gender and Age Groups:**

Findings related to gender distribution indicate a clear predominance of female participants within the sample. Women account for 63% of respondents, while men represent 36%. The proportion of participants who preferred not to disclose their gender remains very limited, at only 1%.

This distribution suggests that, at the household level, women may be more actively involved in decision-making processes or more accessible for participation in data collection activities. At the same time, the relatively lower representation of male participants may reflect factors such as working hours, livelihood activities, or societal roles that influence participation in the data collection process. When examining age group distribution, the findings indicate that participants are largely concentrated within economically active age groups. The 25–34 age group represents the largest share of the sample, accounting for approximately 46% of participants, followed by the 35–44 age group at around 21% and the 45–60 age group at 18%. This distribution suggests that a substantial proportion of respondents are within prime working-age brackets, likely possessing relevant work experience and playing an active role in household economic decision-making.

In contrast, participants aged 18–24 constitute about 11% of the sample, reflecting a more moderate level of representation among younger adults. Meanwhile, individuals aged 60 and above are represented at a relatively low level, comprising only around 4% of respondents. This may indicate lower participation of older age groups in economic activities or reduced inclusion in data collection processes.

*Details of these findings can also be visually examined through the charts below.*

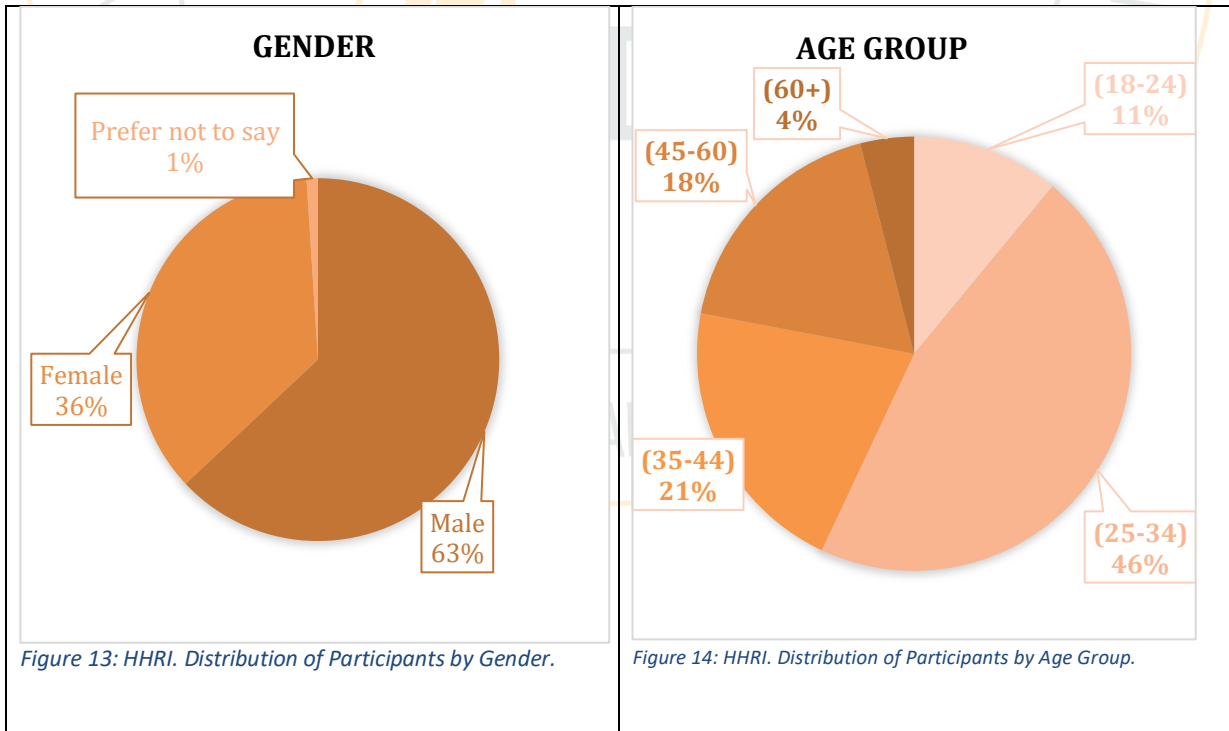


Figure 13: HHRI. Distribution of Participants by Gender.

Figure 14: HHRI. Distribution of Participants by Age Group.



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#### ➤ **Education Level:**

An examination of participants' education levels indicates that the majority possess secondary and higher education qualifications. **University graduates** constitute the largest share of the sample at approximately 31.9%, followed by **high school graduates at 21.4%**. This is closely followed by participants with lower secondary education (**middle school**) at **17.7%** and **primary school graduates at 15.8%**. This distribution suggests that a substantial proportion of respondents have an educational background that may positively contribute to labor market participation and informed household decision-making.

Lower education levels are represented to a lesser extent, with participants who **did not attend school but are literate accounting for 4.3%**, while those who are **illiterate represent 4.8%** of the sample. Postgraduate **degree holders (Master's level) comprise 3.0%** of respondents. **Other education levels account for 0.8%**, and only **0.3% of participants did not specify their education level**. Overall, the findings indicate that the sample is largely composed of individuals with basic to advanced education levels, which may support economic engagement and decision-making processes.

#### ➤ **Nationality and Legal Status:**

The survey results indicate that the vast majority of participants are nationals of the Syrian Arab Republic, accounting for approximately 94.4% of the sample. Turkish citizens represent 3.8%, while individuals holding dual citizenship account for 1.1%. A small proportion of participants (0.8%) did not specify their nationality. This highlights the predominantly Syrian composition of the surveyed population.

With regard to **legal status and type of identity**, most participants are registered under **Temporary Protection**, which represents the dominant status at approximately 82.0%. Dual citizenship holders constitute 8.9% of the sample, followed by those holding a **Family Residence Permit** at 3.2%. Smaller proportions of participants fall under other legal categories, including unregistered individuals (1.1%), those registered but with suspended status (0.8%), student residence or student permit holders (1.6% combined), tourist residence permit holders (0.8%), long-term residence permit holders (0.5%), and individuals holding humanitarian residence permits (0.3%). Other or unspecified statuses collectively remain below 1%.

Overall, this distribution indicates a clear predominance of Temporary Protection status among participants, reflecting a high level of reliance on this legal framework. The concentration within a limited number of legal statuses has direct implications for access to services, employment opportunities, economic stability, and long-term planning, including considerations related to return intentions.

*Details of these findings can also be visually examined through the charts below.*

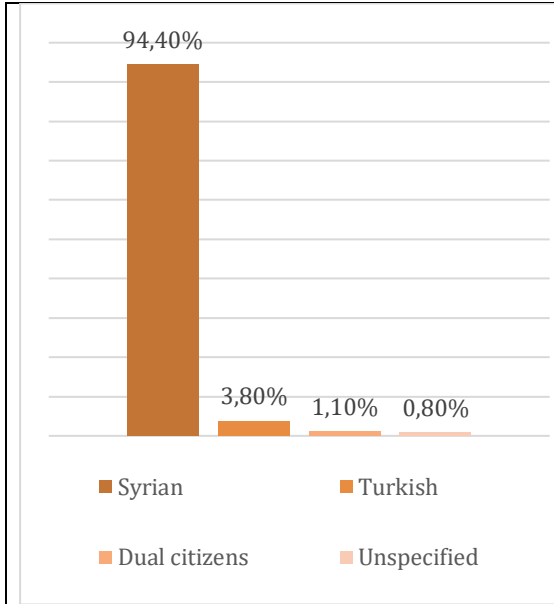


Figure 15:HHRI. Nationality.

Legal status in Türkiye	
Temporary Protection	82%
Dual citizenship	8.9%
Long-Term Residence	0.5%
Family Residence Certificate	3.2%
Registered but status suspended	0.7%
Not specified	2.1%
Student Permit Certificate	1.6%
Humanitarian residence permits	0.3%
Tourist Residency	0.7%

Tablo 3:HHRI. Legal status in Türkiye.

### ➤ **Housing Types by Provinces:**

The findings indicate that rental housing is the dominant accommodation type among Syrian households across all surveyed provinces, accounting for 86.9% of reported housing arrangements. In terms of geographic distribution, rental housing is most prevalent in Mersin (22.5%), followed by Hatay (19.3%) and Gaziantep (16.1%). Comparable proportions are observed in Kilis (12.3%), Şanlıurfa (12.1%), and Adana (10.7%), while Istanbul accounts for 6.4% of rental households. In contrast, rental housing is almost negligible in Ankara (0.3%), and unspecified province responses remain minimal (0.3%).

Other housing arrangements are reported at significantly lower levels. Home ownership represents only 3.5% of households, while staying with relatives accounts for 4.3%, indicating limited reliance on extended-family housing solutions. More vulnerable housing conditions are present but remain marginal, including tents or makeshift shelters (2.1%), storage spaces or shops (0.8%), temporary accommodation facilities or refugee camps (0.3%), and other housing types (0.3%). The proportion of respondents who preferred not to disclose their housing situation is low (1.1%), suggesting a high level of clarity and willingness to report accommodation conditions.

Overall, the combined distribution by province and housing type underscores a strong dependence on the rental housing market across all locations, with limited home ownership and minimal use of collective or informal shelter arrangements.

*Details of these findings can also be visually examined through the charts below.*

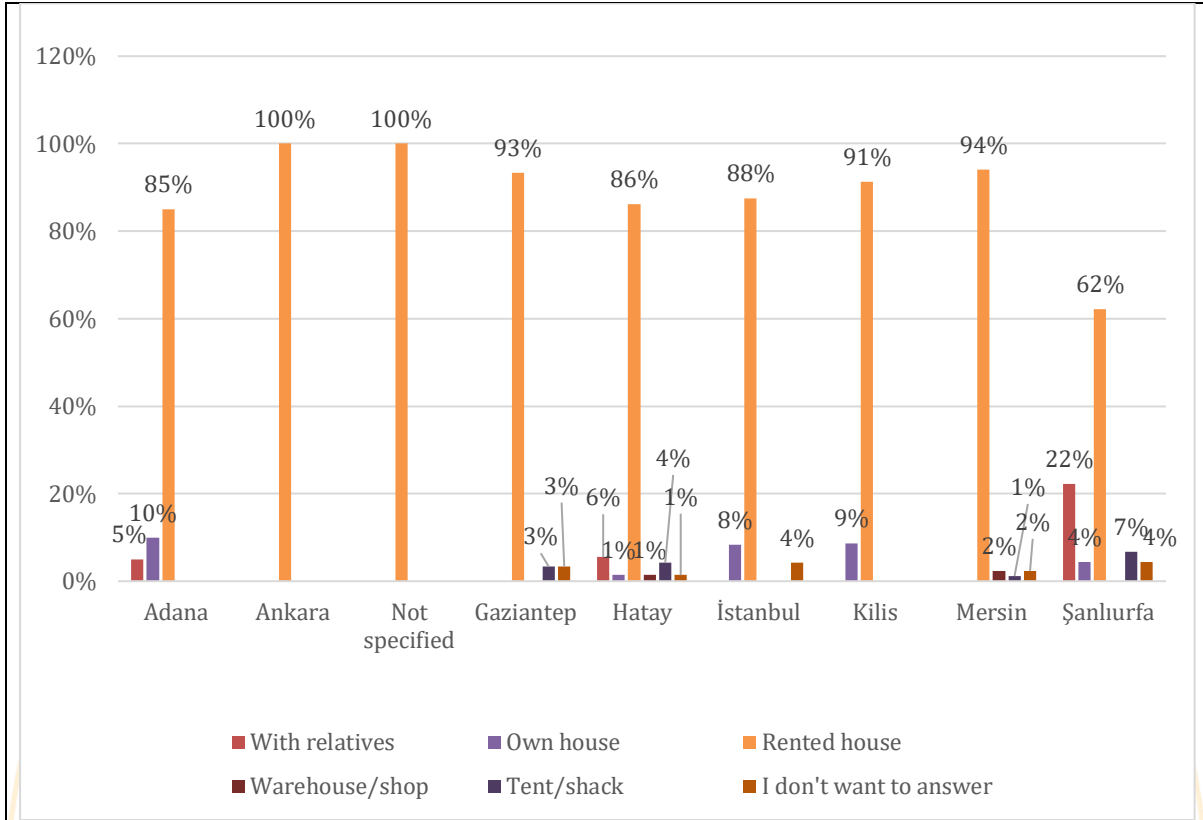


Figure 16: HHRI. Housing Types by Province

### ➤ Household Income Structure :

According to the research results, daily labor emerges as the most prevalent source of income, reported in 27.9% of responses, highlighting a strong reliance on short-term and unstable livelihood strategies. This is followed by regular insured employment, which accounts for 25.1%, indicating that a quarter of households have access to relatively more stable formal jobs. In contrast, regular uninsured employment represents 19.1% of reported income sources, reflecting continued exposure to informality and limited labor protection.

Notably, 12.6% of responses indicate having no source of income, underscoring significant levels of economic vulnerability among households. Social assistance appears in 10.7% of responses, suggesting that it functions primarily as a complementary rather than a sole income source. Self-employment or owning one's own business accounts for 8.7%, indicating that entrepreneurship plays a role for a smaller share of households. Seasonal work represents 7.4%, further pointing to income instability, while other income sources collectively account for 4.9%.

Overall, the income structure reveals a heavy dependence on fragile and irregular income sources, with limited coverage by stable and formal employment, particularly affecting households with no income or those reliant on daily and seasonal work.

Details of these findings can also be visually examined through the table below.



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Income Sources of the Household	Total Revenue			
	50,001 - 75,000 TL	75,001 TL and over	Minimum wage - 50,000 TL	Below the minimum wage (22,104.20 TL)
Other	0	0	3	8
Regular employment (with social security).	1	0	40	40
Regular employment (with social security) and regular employment (without social security).	0	0	2	1
Regular employment (with social security), regular employment (without social security), and daily labor.	0	0	1	0
Regular employment (with social security) and daily labor.	0	0	1	1
Regular employment (with social security) and own business.	0	0	1	
Regular employment (with social security) and seasonal work.	0	0	0	1
Regular employment (with social security) and social assistance.	0	0	2	1
Regular employment (without social security).	4	2	22	27
Regular employment (without social security) and daily labor.	1	0	2	0
Regular employment (without social security), daily labor, and own business.	0	1	0	0
Regular employment (without social security) and social assistance.	0	0	5	2
No source of income.	0	2	5	32
No source of income and other.	0	0	0	2
Daily labor.	2	0	36	40
Daily labor and other.	0	0	0	1
Daily labor and no source of income.	0	0	0	4
Daily labor and seasonal work.	0	0	1	1
Daily labor and social assistance.	0	0	4	6
Own business.	1	2	16	2
Own business and other.	0	0	1	1
Own business and social assistance.	0	0	5	0
Seasonal work.	1	0	9	7

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ADDRESS: AŞKAN MAH. SANCAKTAR CD. NO: 52 MERAM / KONYA

PHONE: 0(332) 324 00 52 - MAIL: [info@ugdd.org.tr](mailto:info@ugdd.org.tr) - WEBSITE: [www.ugdd.org.tr](http://www.ugdd.org.tr)

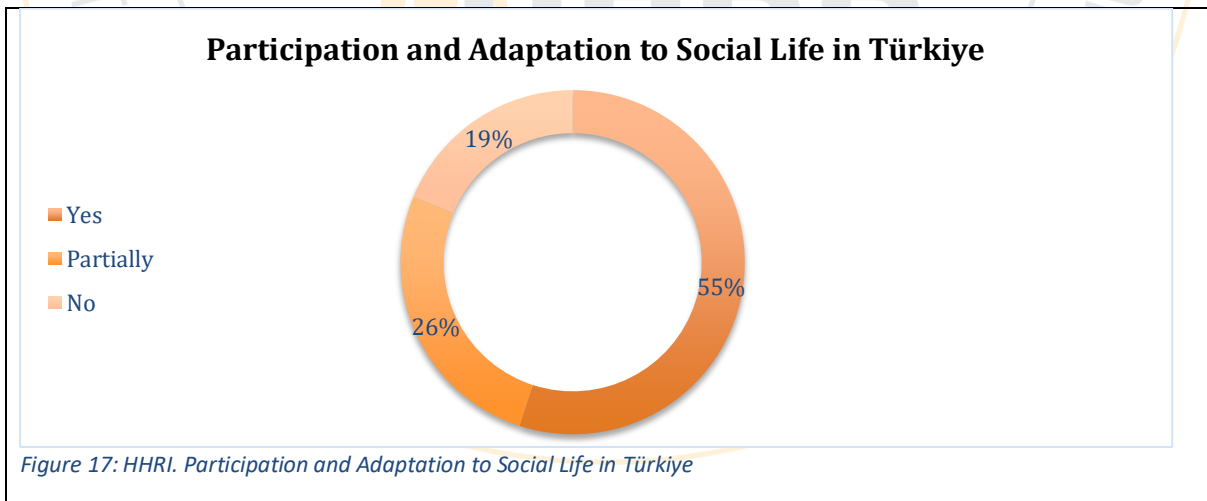
Seasonal work and other.	0	0	0	1
Seasonal work and own business.	0	0	1	0
Seasonal work, own business, and social assistance.	0	0	0	1
Seasonal work and social assistance.	0	0	2	2
Social assistance.	0	0	1	6
Social assistance and other.	0	0	0	1
Social assistance and no source of income.	0	0	0	1

Tablo 4: HHRI. Household Income Structure

### ➤ **Participation and Adaptation to Social Life in Türkiye:**

According to the research results, 55.0% of participants stated that they have been able to adapt to social life in Türkiye, while 26.2% reported that adaptation has been achieved only partially. In contrast, 18.8% of respondents indicated that they have not been able to adapt. These findings suggest that while more than half of Syrians have attained a certain level of social adaptation, a considerable proportion continue to experience partial or full challenges in integrating into social life. The main factors limiting social adaptation include language barriers, experiences of discrimination, economic difficulties, security-related concerns, and spatial constraints such as the distance between residences and workplaces. These factors often intersect and collectively restrict active participation in social life.

Details of these findings can also be visually examined through the charts below.



➤ **Future Plans and Settlement Trends:**

The research findings reveal distinct trends in participants' short- and medium-term future plans. Regarding where they plan to live in the next 12 months, the majority of respondents indicate an intention to remain in Türkiye (64.9%), while 20.4% plan to return to Syria. A notable share of participants report being undecided (11.1%), whereas intentions to move to a different province (1.1%) or migrate to a third country (2.4%) remain relatively limited.

Looking ahead to a five-year horizon, future plans become more evenly distributed. Returning to Syria and staying in Türkiye each account for 38.0% of responses, indicating a clear shift in long-term perspectives. Meanwhile, 18.3% of participants remain undecided, suggesting persistent uncertainty regarding long-term settlement. Plans to move to another province (1.6%) or relocate to a third country (4.1%) continue to represent small proportions.

Overall, these findings indicate that staying in Türkiye is the dominant short-term strategy, while return intentions and uncertainty increase over the longer term, reflecting evolving expectations, external conditions, and longer-term considerations influencing household decision-making.

*Details of these findings can also be visually examined through the charts below.*

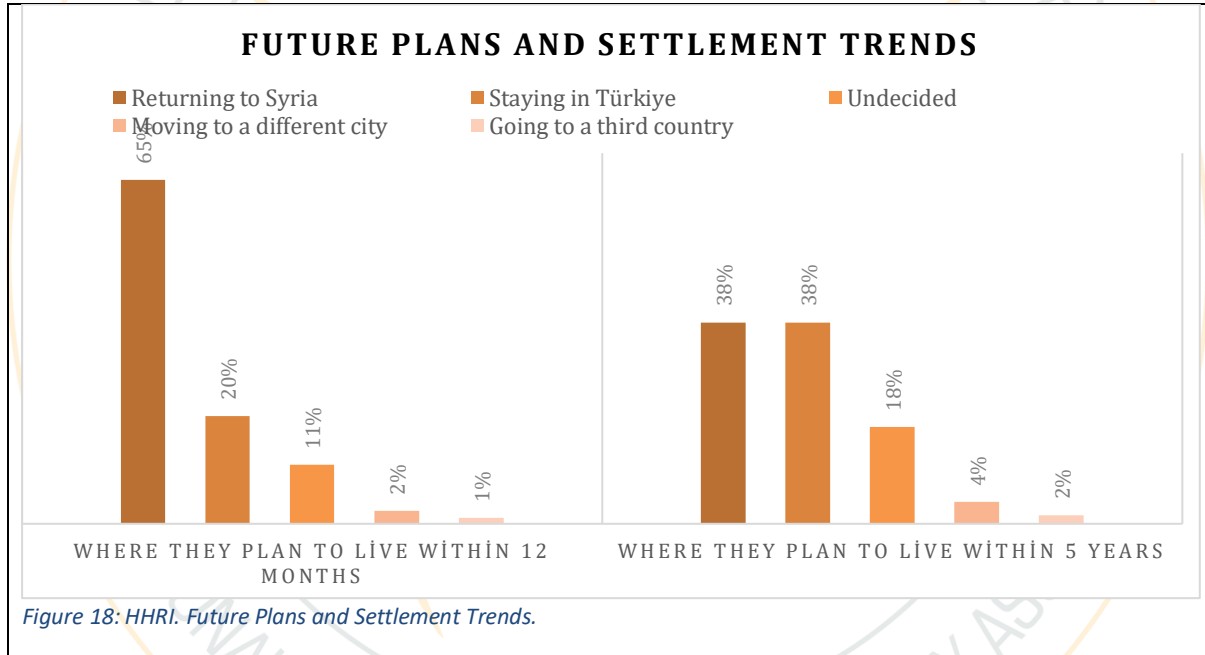


Figure 18: HHRI. Future Plans and Settlement Trends.

When respondents were asked whether their decision to return to Syria was affected after a visit conducted with the governor's permission, the findings indicate that only 19.1% reported having made such a visit, while the majority (80.9%) stated that they had not visited Syria under this arrangement.

Among those who did visit Syria, the impact of the visit on return intentions varied. 39.7% of respondents reported that the visit strengthened their desire to return, while 25.0% stated that it reduced their desire to return. In contrast, 32.4% indicated that the visit had no effect or left them undecided, and 2.9% reported other effects.

Overall, these findings suggest that visits to Syria play a meaningful role in shaping return intentions among those who undertake them; however, the direction of this influence is mixed, with both

positive and negative impacts evident, alongside a substantial share reporting no clear change in their decision-making.

*Details of these findings can also be visually examined through the charts below.*

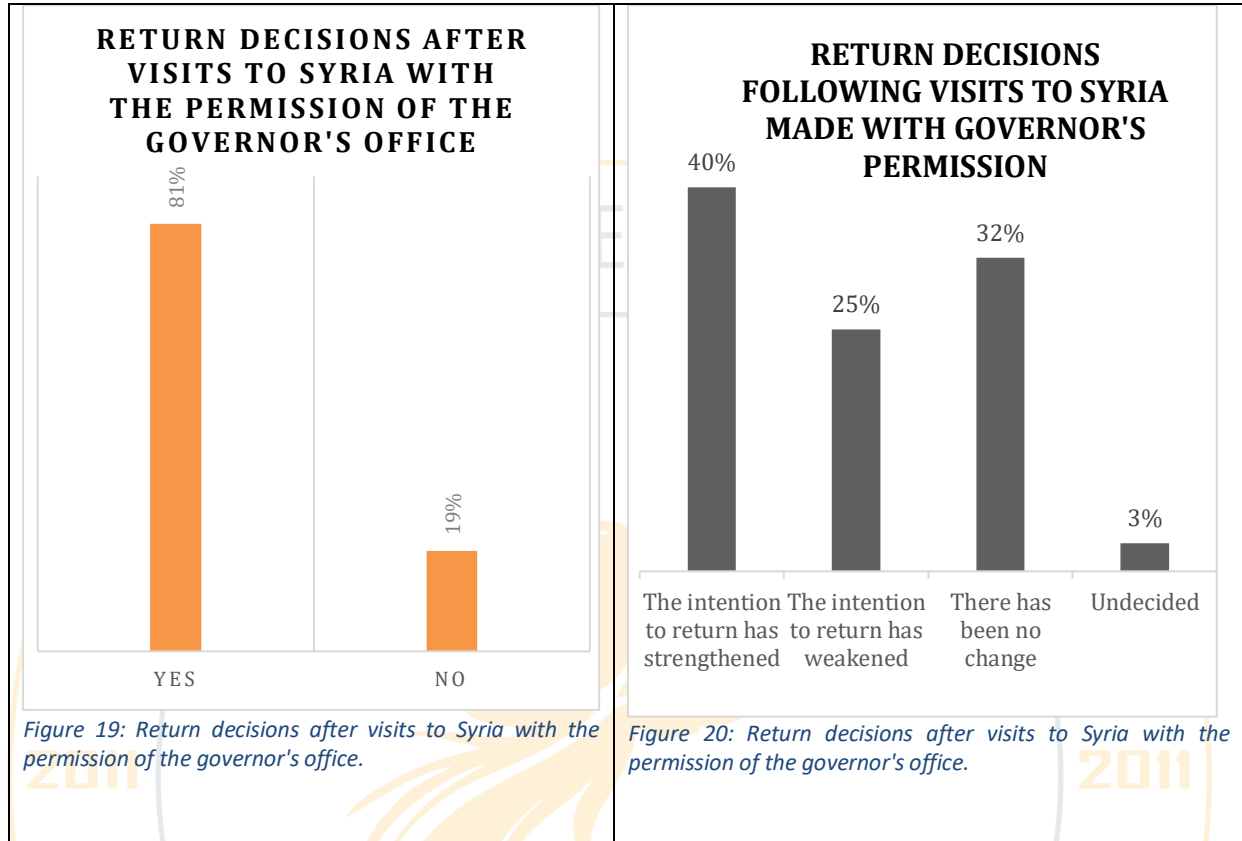


Figure 19: Return decisions after visits to Syria with the permission of the governor's office.

Figure 20: Return decisions after visits to Syria with the permission of the governor's office.

### ➤ **Living Conditions in Syria: Security and Essential Services :**

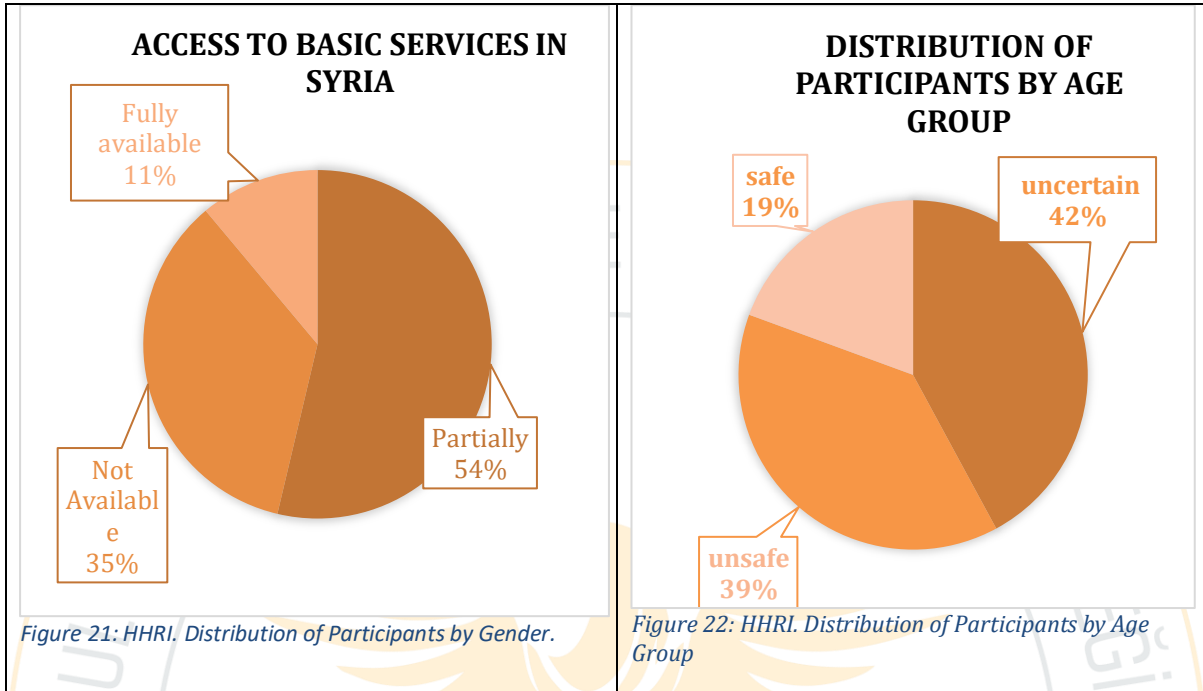
About the current security situation in Syria, perceptions varied considerably. A plurality of respondents (42.1%) reported that they are uncertain about the security conditions, reflecting widespread ambiguity and lack of reliable information. At the same time, 38.5% of participants perceived the situation as unsafe, indicating persistent concerns related to safety and stability. In contrast, only 19.4% of respondents assessed the security situation in Syria as safe.

Overall, these findings highlight a prevailing sense of uncertainty and insecurity regarding current conditions in Syria, which is likely to play a critical role in shaping return intentions and long-term decision-making among Syrian households.

When respondents were asked whether they believe that basic services in Syria (such as water, electricity, health, education, and food) are currently available, the majority expressed limited confidence. More than half of the participants (53.7%) stated that basic services are partially available, indicating gaps in service coverage and quality. Meanwhile, 35.2% of respondents reported that basic services are not available, reflecting significant concerns about living conditions. Only 11.1% of participants believed that basic services are fully available in Syria.

These findings suggest that insufficient access to essential services remains a major concern and may represent a critical barrier to sustainable return.

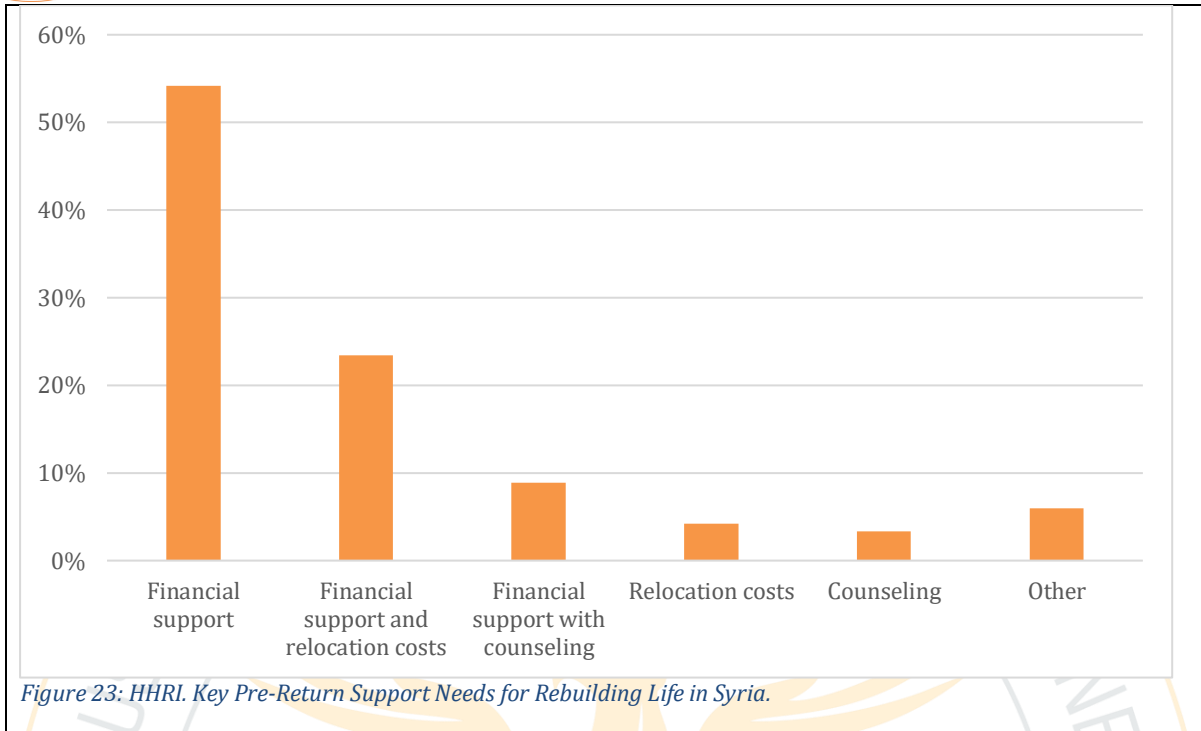
*Details of these findings can also be visually examined through the charts below.*



### ➤ **Key Pre-Return Support Needs for Rebuilding Life in Syria:**

Based on the survey results, **financial support to rebuild life in Syria** emerges as the most critical pre-return need, reported by **54.2%** of respondents, highlighting the central role of economic capacity in return decisions. In addition, **combined needs for financial support and relocation costs** account for **23.4%**, indicating that return planning involves not only securing livelihoods but also covering the costs of physical movement. A further **8.9%** expressed the need for **both financial support and counseling**, while **4.2%** reported a need for **relocation costs only**. Smaller proportions identified needs such as **counseling alone (3.3%)** or other mixed forms of support, each remaining below **3%**. Overall, the findings show that pre-return support needs are overwhelmingly **economically driven**, with counseling playing a secondary but complementary role.

*Details of these findings can also be visually examined through the charts below.*



### **Labor Force and Green Economy**

The survey examines the overall socio-economic profile of respondents, including age, gender, educational background, and other key characteristics, in order to contextualize labor force participation. The findings present detailed information related to employers and the labor force, alongside specific insights into the green economy. In addition, the results shed light on whether participants are currently engaged in green economy activities and outline their future plans and intentions in this sector. Overall, this section provides an integrated overview of workforce dynamics while highlighting the current status and potential of the green economy as part of broader livelihood strategies.

#### **➤ Gender and Age Groups:**

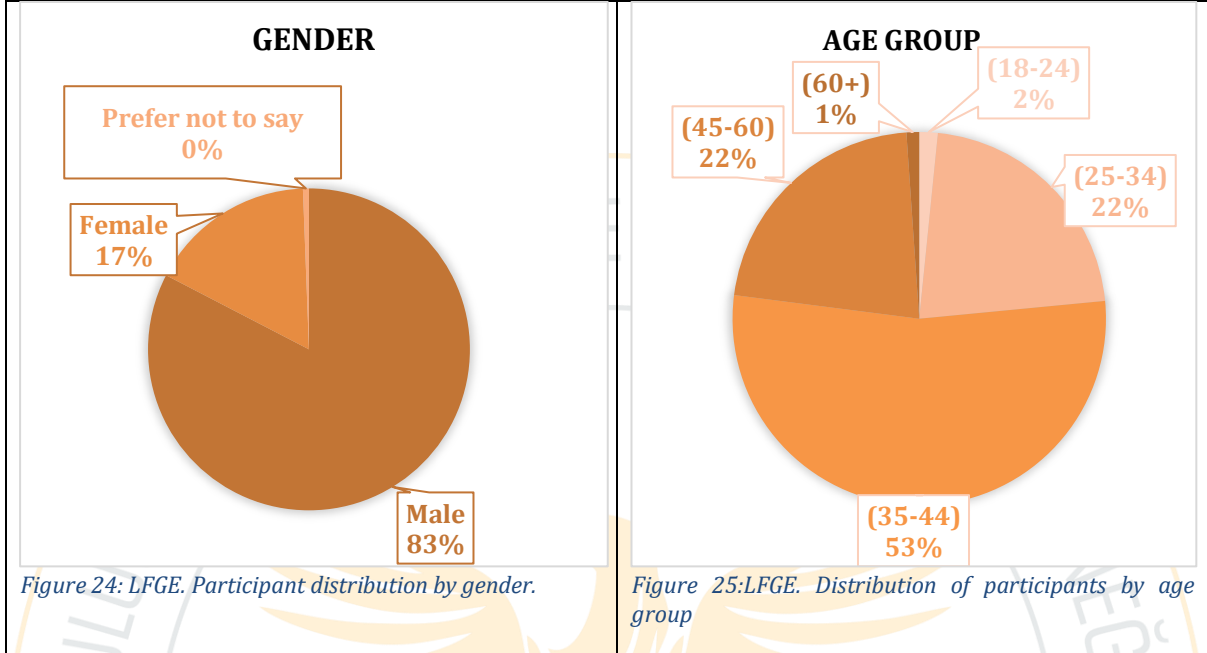
Findings related to gender distribution show a clear predominance of male participants within the sample. Men account for approximately **82.8%** of respondents, while women represent **16.7%**, and only **0.6%** preferred not to disclose their gender. This distribution suggests that men were more accessible or more available to participate in the survey, which may be linked to their role in labor market participation, household representation, or availability during data collection. The comparatively lower participation of women may reflect social roles, time constraints, or contextual factors influencing engagement in survey activities.

In terms of age distribution, respondents are overwhelmingly concentrated within economically active age groups. The **35–44** age group constitutes the largest share at **53.6%**, followed by both the **25–34** and **45–60** age groups, each accounting for **21.9%**. Younger participants aged **18–24** represent a very small proportion (**1.6%**), while those aged **60 and above** account for only **1.1%**. This pattern

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indicates that the sample is largely composed of individuals in their prime working years, who are more likely to be actively engaged in labor force activities and household economic decision-making, while younger and older age groups remain underrepresented.



#### ➤ **Education Level:**

An examination of participants' education levels shows that the majority possess secondary and higher education qualifications. University graduates represent the largest share of the sample at approximately 30.4%, followed by high school graduates at 28.1%. Participants with lower secondary education (middle school) also constitute a substantial proportion at 24.6%, while primary school graduates account for 8.2%. This distribution indicates that a large segment of respondents has an educational background that can positively support labor market participation and informed household decision-making.

Lower education levels are less prevalent within the sample. Participants who did not attend school but are literate make up 4.1%, while those who are illiterate represent 2.3%. Postgraduate degree holders (Master's level) also account for 2.3% of respondents. Overall, the findings demonstrate that the sample is largely composed of individuals with basic to advanced education levels, suggesting a generally strong human capital base that may facilitate economic engagement and decision-making processes.

#### ➤ **Nationality and Legal Status:**

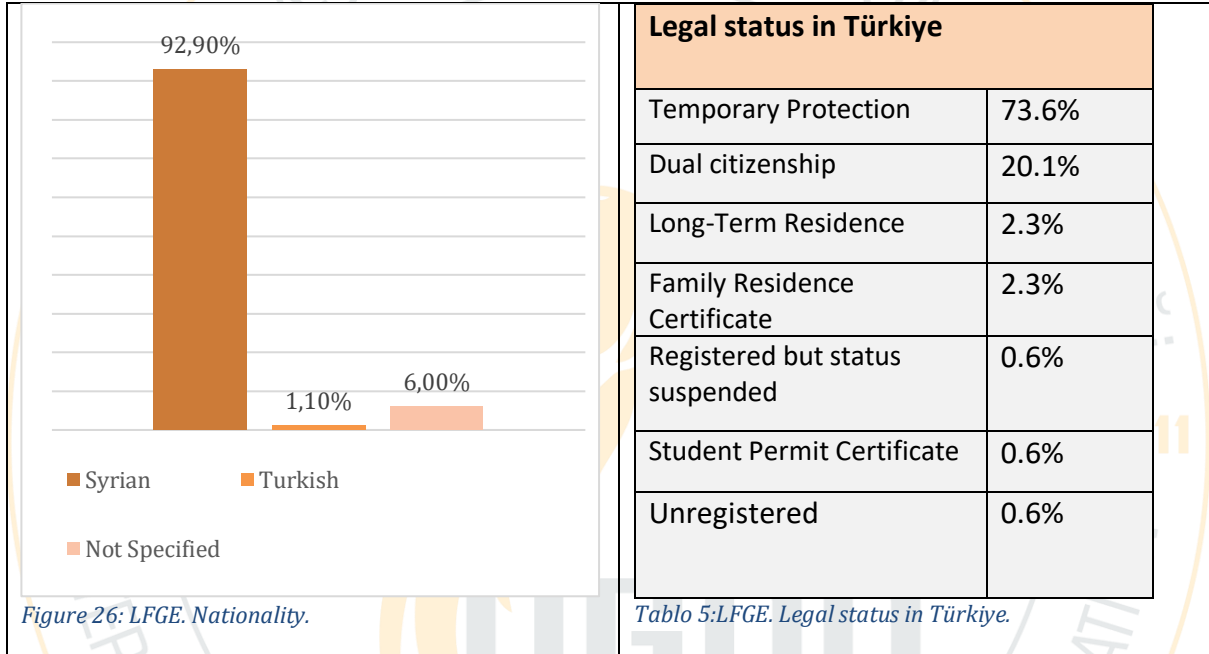
The survey results show that the vast majority of participants are nationals of the Syrian Arab Republic, accounting for approximately **92.9%** of the sample. Turkish citizens represent a very small proportion at **1.1%**, while **6.0%** of respondents did not specify their nationality. This confirms that the surveyed population is overwhelmingly Syrian in composition.

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Regarding legal status and type of identity, **Temporary Protection** clearly emerges as the dominant legal framework, covering approximately **73.6%** of participants. Individuals holding **dual citizenship** constitute a significant share at **20.1%**, reflecting a notable level of legal diversification within the sample. **Family Residence Permit** holders and those with **Long-Term Residence Permits** each account for **2.3%** of respondents. Smaller proportions fall under other categories, including those registered but with suspended status (**0.6%**), unregistered individuals (**0.6%**), and holders of a **Student Residence Permit (0.6%)**.

Overall, the findings indicate a strong predominance of Temporary Protection status among participants, alongside a sizable group holding dual citizenship. This distribution has important implications for access to services, labor market participation, economic stability, and long-term planning, particularly in relation to mobility and return intentions.



Legal status in Türkiye	
Temporary Protection	73.6%
Dual citizenship	20.1%
Long-Term Residence	2.3%
Family Residence Certificate	2.3%
Registered but status suspended	0.6%
Student Permit Certificate	0.6%
Unregistered	0.6%

Tablo 5: LFG. Legal status in Türkiye.

#### ➤ Housing Types by Provinces:

The findings indicate that rental housing is the dominant accommodation type among Syrian households, accounting for 90.2% of all reported housing arrangements. In contrast, 8.7% of households live in their own homes, while staying with relatives and living in tents or makeshift shelters each account for only 0.6%, reflecting very limited reliance on non-rental or informal housing solutions.

In terms of geographic distribution of rental housing, Hatay represents the highest share with 23.0%, closely followed by Mersin (22.4%), Kilis (22.4%), and Adana (21.9%). Şanlıurfa accounts for 22.4%, while Gaziantep represents 3.8% of rental households. Rental housing is least prevalent in Istanbul (0.5%), and unspecified locations account for 4.4%.

Overall, the distribution by province and housing type highlights a strong structural dependence on the rental housing market across all surveyed locations, with home ownership remaining limited and alternative or vulnerable housing arrangements representing only a marginal share.



## INTERNATIONAL ASSOCIATION FOR MIGRATION AND SOLIDARITY

### INTERNATIONAL MIGRATION AND SOLIDARITY ASSOCIATION

#### ➤ **Household Income Structure:**

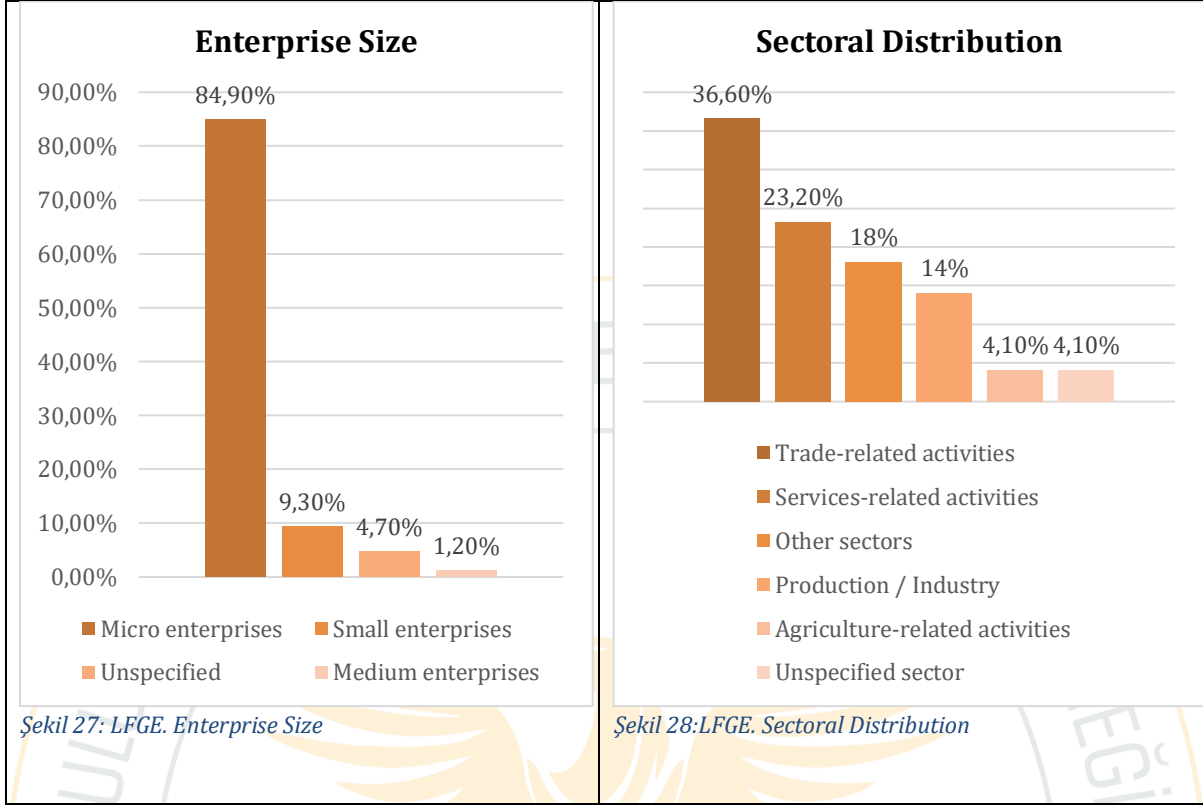
According to the research results, **own business activities** constitute the most dominant source of household income, accounting for **78.1%** of reported responses, either as a sole income source or combined with other forms of work. This highlights the central role of self-employment and small-scale entrepreneurship as key livelihood strategies among households.

Regular employment represents a more limited share of income sources. **Regular insured employment** accounts for **8.9%** of responses, while **regular uninsured employment** represents **6.5%**, indicating that formal and semi-formal wage employment remains relatively constrained. In contrast, **daily labor** appears in **7.1%** of responses, either alone or in combination with other income sources, reflecting continued reliance on short-term and unstable forms of work for a segment of households.

Seasonal work remains marginal at **1.2%**, while households reporting **no income source** account for **1.8%**, underscoring the presence of economic vulnerability within the sample. Overall, the findings indicate that household incomes are heavily concentrated in self-employment, with limited access to stable wage employment and a continued dependence on fragile income-generating activities.

#### ➤ **Enterprise Size and Sectoral Distribution:**

The findings indicate that micro-enterprises (1–9 employees) overwhelmingly dominate the business landscape, accounting for 84.9% of all reported establishments. This highlights a strong concentration of very small-scale economic activities. Small enterprises (10–49 employees) represent 9.3%, while medium-sized enterprises (50–249 employees) remain extremely limited at only 1.2%, underscoring the marginal presence of larger businesses. A further 4.7% of responses did not specify enterprise size. The sectoral distribution of enterprises shows that trade-related activities constitute the largest share of the sample. Pure trade businesses account for 26.7%, while mixed trade activities—including trade with production/industry (4.7%), trade with services (2.3%), trade with agriculture (1.7%), and trade–other combinations (1.2%)—bring the total share of trade-linked activities to 36.6%, underscoring the central role of commerce in household livelihoods. The services sector represents 20.9% of enterprises, with additional mixed forms such as service production/industry (1.7%) and service–other (0.6%), resulting in a combined services-related share of 23.2%. Production/industry accounts for 14.0% as a standalone sector, reflecting a more limited but still notable engagement in manufacturing activities. Agriculture-related activities remain relatively marginal at 4.1%, while enterprises categorized as other account for 18.0%, indicating a degree of sectoral diversity outside the main economic categories. Finally, unspecified sectors represent 4.1% of responses. Overall, the findings highlight an economic structure strongly oriented toward trade and services, with comparatively lower participation in production and agriculture.



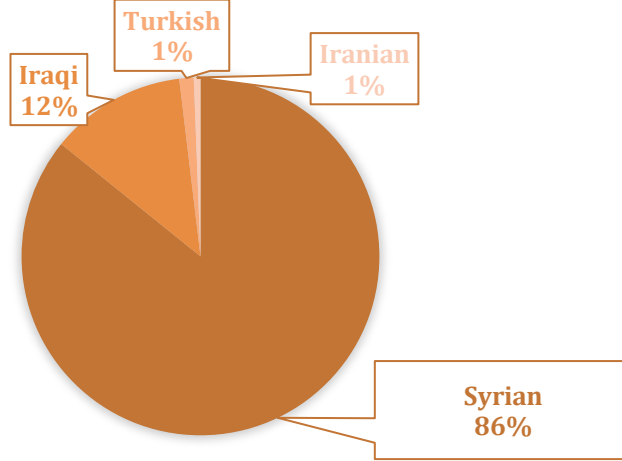
Şekil 27: LFGGE. Enterprise Size

Şekil 28: LFGGE. Sectoral Distribution

### ➤ **Nationality Composition of the Workforce:**

The nationality composition of the workforce within surveyed companies and institutions shows a clear predominance of **Syrian workers**, who account for **85.8%** of the total workforce. **Iraqi workers** represent **12.3%**, forming the second-largest group. In contrast, **Turkish workers** comprise only **1.3%**, while **Iranian workers** account for a very small share at **0.6%**. Overall, this distribution indicates that the labor force in the surveyed enterprises is overwhelmingly Syrian, with limited representation of other nationalities.

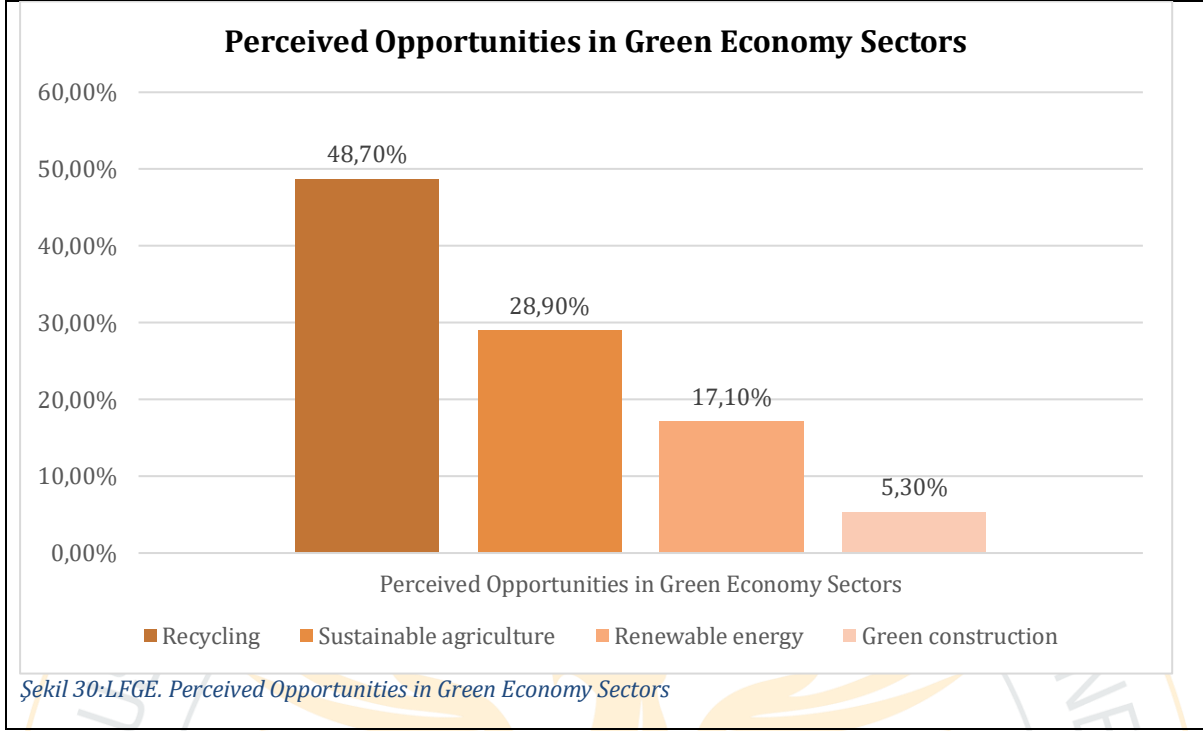
**NATIONALITY COMPOSITION OF THE WORKFORCE**



Şekil 29:LFGE. Nationality Composition of the Workforce

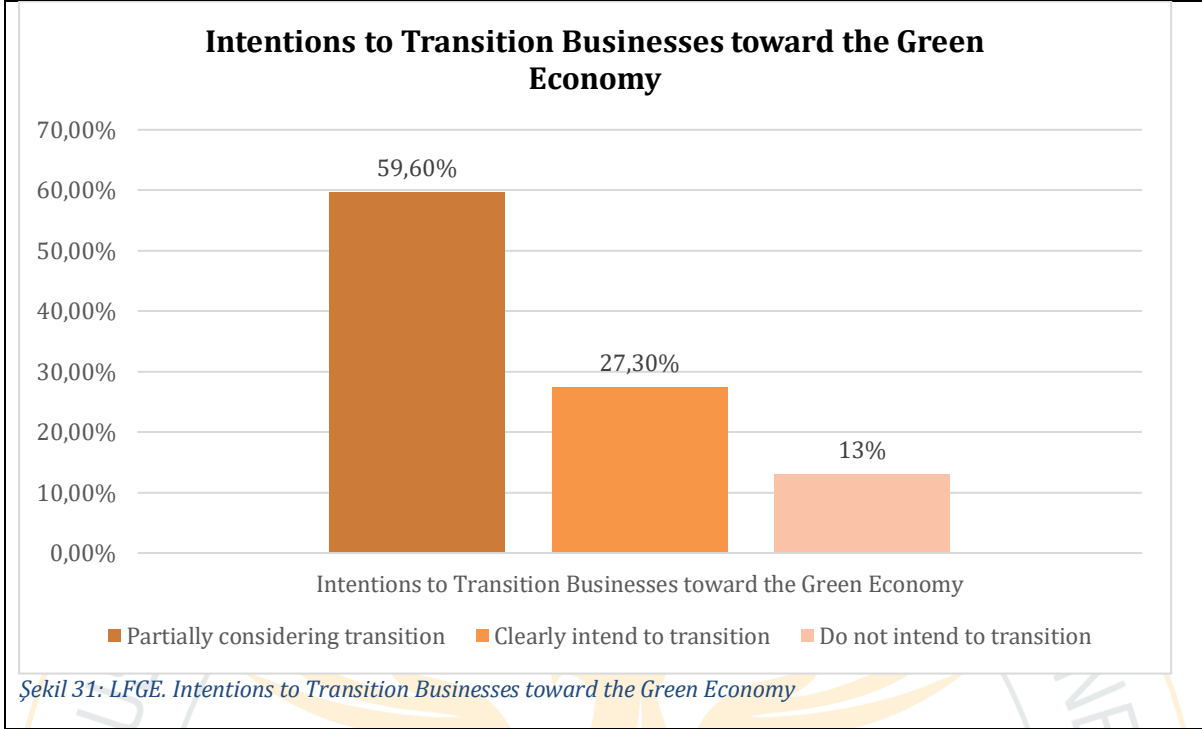
➤ **Perceived Opportunities in Green Economy Sectors:**

The findings indicate that **recycling** is perceived as the green economy field offering the greatest opportunities, cited by **48.7%** of responses. This is followed by **sustainable agriculture**, which accounts for **28.9%**, highlighting its continued relevance as a viable and accessible green livelihood option. **Renewable energy** represents **17.1%** of responses, suggesting a moderate level of perceived opportunity, likely linked to skill and capital requirements. In contrast, **green construction** is identified by only **5.3%**, indicating relatively limited awareness or perceived accessibility of this sector among respondents.



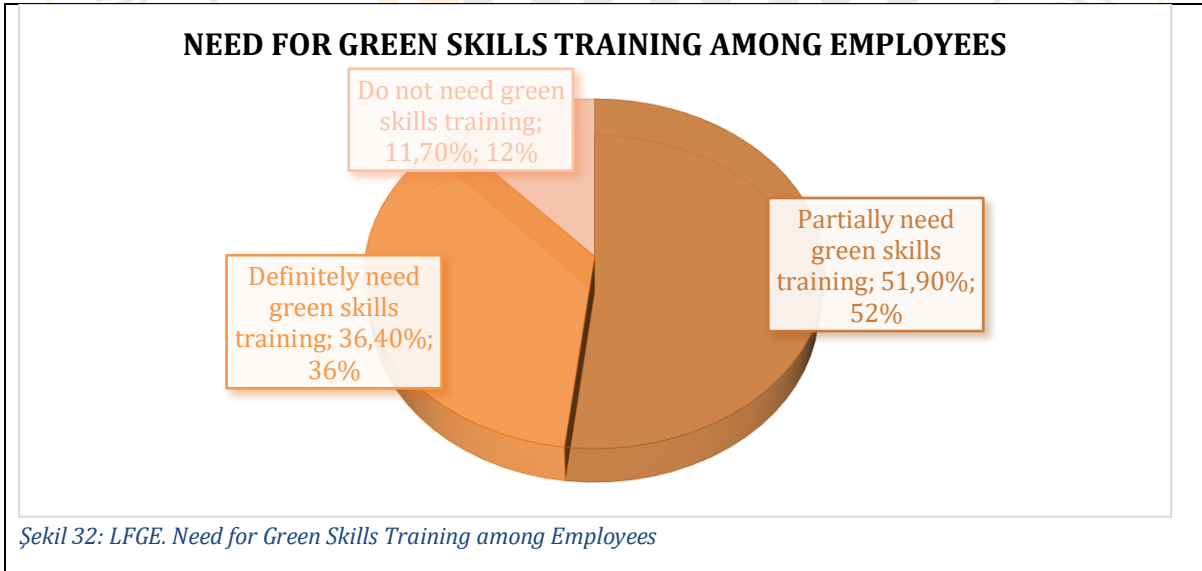
➤ **Intentions to Transition Businesses toward the Green Economy:**

The findings show a cautious but generally positive outlook toward engaging with green economy sectors in the future. A majority of respondents (**59.7%**) stated that they **partially** consider directing their businesses toward green economy activities, indicating openness alongside existing constraints or uncertainties. Meanwhile, **27.3%** reported a clear intention to shift their businesses toward green sectors, reflecting a notable level of readiness and interest. In contrast, **13.0%** stated that they do not plan to orient their businesses toward the green economy, suggesting either limited feasibility or low perceived relevance.



➤ **Need for Green Skills Training among Employees:**

The findings indicate a substantial demand for green skills development within the workforce. More than half of the businesses (51.9%) reported that their employees **partially** require training in green skills, suggesting existing competencies that nonetheless need strengthening or updating. Additionally, 36.4% of respondents stated that their employees **definitely need** training in green skills, highlighting a clear skills gap. In contrast, only 11.7% indicated that no such training is needed, reflecting a relatively limited perception of workforce readiness in this area.



➤ **Key Barriers to Transitioning toward the Green Economy**

The findings indicate that **financial constraints** are the most significant barrier to transitioning toward green economy practices, cited by **40.3%** of businesses. This is followed by **lack of information and awareness** at **29.9%**, highlighting gaps in knowledge, guidance, and access to relevant expertise. **Technical infrastructure limitations** account for **22.1%**, suggesting challenges related to equipment, technology, or operational readiness. In contrast, **regulatory barriers** are reported by **3.9%**, while **labor shortages** remain minimal at **2.6%**, indicating that structural and capacity-related factors outweigh workforce availability concerns.

