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INSTITUT FÜR ÖKONOMIE
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Valuable As Leather?

Being a leather industry worker and
producer in Turkey
A Rapid Assessment

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Valuable As Leather?

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Index

Executive Summary	1
Acronyms	3
Introduct on	4
The Bigger Picture	8
• The Leather Sector	8
◦ Leather Sector in Global Perspective	8
◦ Leather Sector in Turkey	11
• The National Context	18
◦ Labour Regulation Related to the Leather Production Sector in Turkey	18
◦ Child Labour in Turkey	19
◦ Migration and Migrant Workers in Turkey	22
◦ Impact of the Covid-19 Pandemic in Turkey	24
Research Design, Methods and Part cipants	27
• Study Regions and Participants	29
• Limitations	32
Findings and Discussion	
• Working in the Leather Industry	33
◦ Cheap Labour	34
◦ Trapped and Invisible	39
◦ Unprotected	42
• Running a Small Business in the Leather Industry	45
◦ Precarious Work, Under Pressure	46
◦ Unfair Prices and Competition	51
◦ External Impacts on the Sector: Syrian Migration to Turkey and Covid-19 Pandemic	53
Conclusion and the Way Forward	58
• The Way Forward	60
• Prioritising the Unprotected and Their Recovery	60
• Collaborative Action for Sustainable Change	63
• Tailored Interventions for Women and Children	66
Annex	74



Executive Summary

This Rapid Assessment focuses on the workers and small scale producers of the leather and leather products sector in Turkey. The main objective was to describe the working environment for informal workers in the sector, to understand and differentiate problems related to those working environments and labour conditions for different worker groups with respect to age, sex, biographies, legal status, and to identify possible action towards improvement. The assessment was conducted during summer 2021 with desk research, observations and 35 semi-structured interviews with key informants (workers, employers, parents of child workers and institutions) in five provinces. Interviews display indecent working conditions, heavy workload, absence of labour standards as well as chronic uncertainty, irregular work and insecure livelihood. Some of the findings are:

- The interviewed workers earn very little. Monthly total earnings of the adult workers interviewed are roughly 2,300 TRY on average. Child workers earn much less: Monthly earnings vary between 400 TRY and 1,600 TRY.
- Parents underlined that their children shall not work, but rather continue their education. However, as they are having financial hardship and difficulties in finding livelihood sources, their children must work.
- All the workers except for one do not have working contracts. For some of the migrant workers, informality is the only option they seem to have to make a living under the given regulatory circumstances. Workers are not just unprotected regarding social security, but also considerably unprotected on the job with respect to occupational health and safety health measures.
- Female workers highlighted that apart from these problems, this male-dominated, unhygienic working environment in the sector is not suitable for them.
- In shoe, bag and belt manufacturing, working more than 10 hours per day with just one (lunch) break, and during public/national holidays is usual practice. Most workers do not consider receiving compensation either financially or with paid time off for overtime work.

- Most of the small scale producers interviewed have little room to manoeuvre to improve the situation for workers due to the economic pressures they perceive. They often work side-by-side with their employees.
- Both the integration of Syrians to the Turkish labour market and the Covid-19 pandemic had undeniable impact on the sector and its workforce which is discussed in the report.



This rapid assessment is the first step taken to disclose that the reality which the workers and small scale producers in the leather and leather products industry in Turkey experience every day is not in line with decent work and labour standards. The findings clearly indicate the necessity of further inquiries and engagement. The problematic areas and the most urgent needs expressed by the study participants were used to determine the following action areas that are expected to be considered by institutions and organizations that have a role and responsibility to contribute to the solution:

- Prioritising the unprotected and their recovery,
- Collaborative action for sustainable change,
- Tailored interventions for women and children.

Acronyms

AYKOSAN:	Istanbul Ayakkabıcılar Küçük Sanayi Sitesi Yapı Kooperatifi (İstanbul Shoemakers Small Industry Site Cooperative)
DERİTEKS:	Deri, Dokuma ve Tekstil İşçileri Sendikası (Union of Leather, Weaving and Textiles Workers)
DERSANKOOP:	Istanbul Deri Mamülleri Toplu İş Yeri Yapı Kooperatifi (İstanbul Leather Products Collective Workplace Cooperative)
DGMM:	Republic of Turkey Ministry of Interior, Directorate General of Migration Management
EU:	European Union
ILO:	International Labour Organisation
IMF :	International Monetary Fund
ITC:	International Trade Center
İDMİB:	Istanbul Deri ve Deri Mamulleri İhracatçılar Birliği (İstanbul Leather and Leather Products Exporters Association)
İŞKUR:	Turkish Employment Agency
İTKİB:	Istanbul Tekstil ve Konfeksiyon İhracatçı Birlikleri (İstanbul Textile and Garment Exporters Association)
MOH:	Republic of Turkey Ministry of Health ((Türkiye Cumhuriyeti Sağlık Bakanlığı)
MOLSS:	Republic of Turkey Ministry of Labour and Social Security (Türkiye Cumhuriyeti Çalışma ve Sosyal Güvenlik Bakanlığı)
NGO:	Non-governmental organisation
OHS:	Occupational Health and Safety
SDG:	Sustainable Development Goals
MSME:	Micro, Small and Medium Size Enterprise
SSI:	Social Security Institution (SGK)
STL:	Support to Life Association
TASEV:	Türkiye Ayakkabı Sektörü Araştırma Geliştirme ve Eğitim Vakfı (Turkey Footwear Sector Research Development and Education Foundation)
TCLF:	Textile, Clothing, Leather and Footwear
TEKSTİL:	Tekstil İşçileri Sendikası (Union of Textile Workers)
TESK:	Türkiye Esnaf ve Sanatkarları Konfederasyonu (Confederation of Chambers of Tradesmen and Craftsmen)
TİM:	Turkish Exporters Assembly
TİSK:	Turkish Confederation of Employer Association
TOBB:	Union of Chambers and Commodity Exchanges of Turkey

Introduction

Despite changing perceptions, leather is still often seen as a valuable material. Leather is used for noble shoes and jackets, in luxury cars and for expensive bags. But are workers and micro and small producers in the supply chains valued as much as the material they work with? The following rapid assessment indicates that they often are not. The assessment focuses on the leather sector in Turkey.

Turkey's Textile, Clothing, Leather and Footwear (TCLF) manufacturing sectors' substantial position for the national economy and its share in the global market has been growing over the last decade. An overwhelming amount of this production is being carried out in integrated industrial facilities. However, micro, small and medium scale enterprises (MSMEs) are also important actors, which are very dynamic and responsive to trends and sectoral competition. In these MSMEs, much of the production is organized informally, which means labour without work permits, contracts, or formal registration, making record-keeping and monitoring systems and the intervention of legal systems much more difficult. For workers, informality increases various risks including violations of their human rights, specifically worker rights, such as child labour, unsafe working conditions, and expressions of exploitation and incompliance with legal frameworks. In addition, leather (products) value chains mostly involve the use of toxic chemicals, leading to undeniable and specific health risks for the workers. Further challenges for the sector in the recent past have been the Covid-19 pandemic and undocumented migrant labour, especially related to the political and humanitarian crisis in Syria.[1]

[1]For more information on terminology undocumented migrant <https://picum.org/words-matter/> PICUM, the Platform for International Cooperation on Undocumented Migrants, is a network of organizations working to ensure social justice and human rights for undocumented migrants. Migrant worker numbers grow, along with vulnerabilities; (ILO, 2021a) https://www.ilo.org/global/about-the-ilo/multimedia/video/institutional-videos/WCMS_809230/lang--en/index.htm According to the latest estimates of ILO, the number of migrant workers has increased by 5 million since 2017. The Covid-19 pandemic has highlighted the critical role migrants play as essential workers, but it has also exposed their vulnerability to the devastating health, economic and social impacts of the pandemic.

It became an essential and infeasible provision of business principles for the sector in Turkey to ensure decent working conditions for all employees and zero tolerance for discrimination and violence at the workplace, eliminating child labour and undocumented migrant labour in the supply chains, and safeguarding occupational health and safety (OHS) at any stages of the production.[2] Those goals are in line with international frameworks which assign responsibility not only to states' governments, but also to companies, to ensure compliance with human and labour rights in their supply chains.

Such a framework is the UN Guiding Principles on Business and Human Rights endorsed by the UN Human Rights Council in June 2011, which are a set of guidelines for states and companies to prevent, address and remedy human rights abuses committed in business operations. Following those guidelines, diverse countries have either planned or already decided to include human rights due diligence into their national legislations. Further, in 2015, the UN General Assembly (UNGA) defined the four pillars of the Decent Work Agenda [3] – employment creation, social protection, rights at work, and social dialogue – as integral elements of the new 2030 Agenda for Sustainable Development. Sustainable Development Goal (SDG) 8.5 of this Agenda calls for the promotion of sustained, inclusive and sustainable economic growth, full and productive employment and decent work. Key aspects of decent work are also widely embedded in many of the other 16 SDGs formulated. Furthermore, in 2019, the UNGA adopted a resolution welcoming the International Labour Organization (ILO) Centenary Declaration for the Future of Work.[4] The resolution emphasizes the need for a human-centred approach to the future of work.

[2] As a recent example, the ILO Turkey Office in close cooperation with MoLSS and TESK, launched a 3-year Project on Promoting Decent Work for Syrians under Temporary Protection and Turkish citizens in Host Communities in 2019. Furthermore, the Transition to Formality Programme (KİGEP) of ILO and SSI, supporting companies to protect and create decent works, extends to cover thousands of new employees.

[3] <https://www.ilo.org/global/topics/decent-work/lang-en/index.htm>

[4] [https://www.ilo.org/newyork/news/WCMS_719183/lang-en/index.htm%22%205Cl%20%22:~:text=NEW%20YORK%20\(ILO%20News\)%20%E2%80%933,policy%20proposals%20into%20their%20work](https://www.ilo.org/newyork/news/WCMS_719183/lang-en/index.htm%22%205Cl%20%22:~:text=NEW%20YORK%20(ILO%20News)%20%E2%80%933,policy%20proposals%20into%20their%20work) and ILO, 2015.

The ILO defines decent work as work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organize and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men.

Leather value chains, however, are often intransparent, organized partly by subcontracting, which arguably hampers sustainable transformation (see e.g. Envol Vert, 2020; Gojowczyk et al., 2021; Sebastio, 2021; UN Economic Commission for Europe, 2021). Important information on aspects such as working conditions, which cannot be “checked” in the final product, are rare to find. Current studies inquiring into decent work and labour standards specifically in the leather sector in Turkey are very few and are limited in scope.[5]

The goal of the rapid assessment is to describe the working environment of workers in the micro and small scale leather (goods) production in Turkey, to understand and differentiate problems related to those working environments for different groups (age, sex, biographies, legal status, workers and employers), and to identify possible actions towards improvement for different stakeholders. In order to inquire into those aspects, 35 interviews with key informants in five provinces (Adana, Bursa, Hatay, İstanbul, İzmir) were conducted and analysed. Informants included workers, parents of working children, employers, representatives of workers unions, non-governmental organisations (NGOs) and trade and commerce chambers. Interviews were flanked by observations (whenever possible) and a desktop study was carried out for the collection of secondary data. An actor mapping can be found in the Annex 1 including all relevant actors that have roles, responsibilities or actions targeting the leather sector’s working conditions and compliance with human rights.

To put in a nutshell, the secondary data, field work as well as

[5]Hak İnisiyatifi, 2017. Development Workshop Cooperative, 2019. Deri Tekstil ve Kundura İşçileri Derneği, 2020 a-b-c.

institutional interviews displays that in the informal leather and leather products sector in Turkey, wage payments are barely equal to net minimum wage and/or irregular even despite overlong working hours in unhealthy, unsafe workplaces without OHS measures, awareness and equipment. Data reveals that workers and small scale producers work incredibly hard to produce as much as possible, still they are not being paid tribute to. Given the very poor pricing and tight deadlines of orders received, employers express the need for a labour force to be employed under the bad and illegitimate conditions described to be able to make any profit. In several instances, they work side by side with their employees. Workers accept and even “appreciate” the job offer with the attempt to ensure their livelihoods. For migrants, informal work is a matter of survival as no other livelihood option is available for them. Our impressions are that given the circumstances, hardly anyone can generate the resources for positive change in the medium term. Thus, workers and their employers are in the same “sinking” boat and both feel that they cannot leave it.

The report starts with background information on the sector as well as on labour regulation, child and migrant labour, the Covid-19 pandemic measures and its impact in Turkey. After the research design is presented, the findings of the rapid assessment provide information and insights on working conditions, especially in micro and small scale leather production in Turkey. Lastly, the conclusion section provides recommendations for further documentation as well as deeper understanding of the root causes of the problems, loopholes in the implementation of legal standards, and the impacts of these challenges on human lives and the sector. The findings may also assist businesses in the leather sector to know about human rights related risks in their value chains and to fulfil their duties of care both for their employees and for their suppliers’ workers to the best of their ability.

The Bigger Picture

The Leather Sector

The ILO describes the TCLF sector with high volatility, low predictability, and generally low profit margins, characterized by geographically dispersed production and rapid market-driven changes, and so providing employment opportunities to millions of workers worldwide (ILO, 2014a). Although this rapid assessment focuses on micro and small leather product manufacturers and leather producers in Turkey, this section introduces both the sector and the national context to give the bigger picture before moving on to the research design and findings.

Leather Sector in Global Perspective

The value chain of leather embraces several steps from raising and slaughtering the animal to ‘finishing’ the leather. The finished leather is then used for products such as footwear, car seats, furniture, accessories like belts and bags, or clothing. The leather sector is hence populated by diverse business actors (including farms, slaughterhouses, diverse tanneries, manufacturers, fashion brands and others). Depending on sufficient supply of hides and skins, the sector is often regionally coupled with the meat industry (such as in the Amazonian region) and, especially in poor economies, is viewed as an opportunity to generate additional worth based on populations’ livestock (for example in Ethiopia). However, once the skins and hides are preserved, they can be transported across the globe, and often are. The two most important exporters in the leather market are China with 61 billion USD export value in 2020 and Italy with 23 billion USD exported value.[6]

Even though specific in many regards, the leather sector is often covered in the combination TCLF both in international organizations as well as in global civil society engaging for workers’ rights. An ILO’s Global Dialogue Forum on Wages and Working Hours in the sector in 2014 emphasized that:

[6] www.trademap.org

Manufacturers generally have low profit margins. Buyers and market pressures are driving down sourcing costs, including the cost of manufacturing, which includes labour costs. Minimum wage levels in the sector are generally low and sometimes do not fulfil the needs of workers and their families. The fulfilment of these needs is sometimes only achieved through excessive overtime work. Fluctuations in demand and short lead times require flexibility in working time, often result in unduly long working hours. (ILO, 2014b: 1)

When the Covid-19 virus spread in the beginning of 2020, in many instances, working conditions and labour standards worsened. The TCLF sector was hit hard by the pandemic and “as brands [have] cancel[led] their orders, the consequences are being disproportionately felt by the most vulnerable in the supply chain, namely the workers and farmers. Although the negative impact is widespread, contract labourers, home based workers, migrants, daily wage workers and piece rate workers [have been] especially at risk” (Fair and Sustainable Textiles - Civil Society Coalition, 2020: 3).

Globally, the TCLF sector predominantly employs female and young labourers. However, figures diverge significantly between countries, and in the textile, clothing and garment industry the greatest share of the labour force are young women with relatively low skills.[7] Tanning, leather and footwear manufacturing on the contrary are still male-dominated, though in footwear manufacturing female workers are being employed in lace-making, thread cleaning, hand or machine cut uppers and soles, stitching by hand or sewing with machine, gluing for assembling, packing, inspection/quality control.[8]

[7]Çalışma ve Sosyal Güvenlik Bakanlığı, İş Teftiş Kurulu Başkanlığı, 2013: 12. ILO, 2014 a-b.

[8]“In other words, for the tasks that require delicacy and hand skill, female workers are employed.” a representative of DERİTEKS (Union of Leather, Weaving and Textiles Workers) communicates in one of the interviews for this study.

Leather production is known to be particularly toxic, riddled with environmental and health concerns throughout the supply chain. Human rights violations and bad labour conditions are observed in the different tiers and in different world regions. Most of the work fits the description of Dirty, Dangerous and Difficult (3-D) jobs; [9] involving dangerous or physically arduous manual labour, prolonged periods of repetitive motion, and work that is socially devalued, undesirable and low-paying. The risk of child labour is listed for leather and leather goods production in Bangladesh, India, Mexico, Pakistan, and Vietnam by the United States Bureau of International Labour Affairs's 2020 List of Goods Produced by Child Labour or Forced Labour. The risk of child labour is also identified for footwear production in Bangladesh, Brazil, India, Indonesia, Turkey and Vietnam. Forced labour is documented for footwear production in China. Moreover, even some business consulting and auditing actors start to recognize that exploitation of the workforce in the sector is neither limited to those countries (cf. e.g. Sebastio, 2021 for problems in Italy) nor to the issues of child or forced labour.

Other violations of labour rights are, for instance, harassment, violence, and discrimination, restrictions on the right to form trade unions and to bargain collectively, and restrictions on the freedom of association. Informal employment or absence of working contracts as well as very low level of wages (under minimum living wage standards and even minimum wage limits) hamper the social, economic and legal position of workers and limit their access to social security systems (cf. e.g. civil society reports: CYS, 2021; Public Eye, 2017; for rare academic accounts cf. e.g. Sarker and Akter, 2018; Grumiller, 2021). General health risks for workers in tanneries, insufficient OHS measures, and negative impacts of the industry on communities' water and grounds are comparably well-researched, but insufficiently addressed in many workplaces (cf. e.g. Hasan et al. 2019; Junaid et al. 2017; Sawalha et al. 2019). A recent study focusing on Brazil has just illustrated the prevailing intransparency of the value chains, which makes the task to track products and identify relationships between final products and concrete legal violations in the supply chain extremely challenging (Envol Vert, 2020).

[9] <https://www.ilo.org/safework/areasofwork/hazardous-work/lang--en/index.htm>

The leather sector is also put under pressure by animal rights groups as their discourses are beginning to influence consumption decisions. Alternative materials are increasingly developed and used in final products. While awareness of sustainability issues increases and respective initiatives emerge and spread in the leather sector, globally “the great sustainability transformation” has not yet begun on a broad scale. With the disruptive effect of the Covid-19 pandemic and the experience that value chains are vulnerable, there might be a window of opportunity for this beginning. This introduction to the sector shows that even though the context of this report and the problems described are (partly) specific for Turkey, cutting relationships with Turkish producers and switching to other production areas will not free international buyers from the duty to deal with their leather supply chains.

Leather Sector in Turkey

Turkey's TCLF sector's substantial position in the national economy as well as in the global market has been growing over the last decade. In the first seven months of 2021, leather and leather products accounted for 0.8% of all exports from Turkey, with a value of 938.3 million dollars.[10] Turkish companies manufacture products or supply raw materials both for the national and international markets.[11] An overwhelming amount of the production is being carried out in integrated industrial facilities. However, MSMEs continue to be vital actors in the supply chains.

The International Trade Center (ITC) trade statistics (Trade Map) [12] helps assess the relevance of the Turkish leather sector in the global economy. In the related categories, Turkey's exports in value rank between 21st and 27th globally (see Table 1). Turkey reached more than 1 billion USD exported value in 2020 in leather products, representing 0.6% of world exports of these products.

[10] Source: İTKİB, 2021. For Leather Exports Monthly Statistics and map by İstanbul Deri ve Deri Mamulleri İhracatçıları Birliği (İstanbul Leather and Leather Products Exports - İDMİB) <https://www.idmib.org.tr/tr/bilgi-merkezi-istatistik-aylik-ihracat-kayit-rakamlari-2021.html> <https://www.idmib.org.tr/kuresel-ihracat/deri.htm?i=2&v=3&t=2015,2021 Ocak-Haziran>

[11] For detailed information on the history of leather production in Turkey; Ticaret Bakanlığı, İhracat Genel Müdürlüğü, 2019 a-b-c-d. Kalkınma Bakanlığı, 2018. İstanbul Sanayi Odası, 2015 and 2014.

[12] www.trademap.org

Among all leather products exported from Turkey, the greatest value was achieved through footwear (65% of the exported leather sector products) with an exported value of 829 million USD. The first three importing countries and their share in Turkey's exports (%) were Russian Federation (7.9%), Iraq (7.7%), and Germany (7.2%). Other articles of leather with an exported value of 284 million USD were exported to Germany (11.4%), United Kingdom (9%), and France (8.1%). Finally, with an exported value of 155 million USD raw hides and skins (other than fur skins) and leather were exported to Italy (14.3%), India (13.2%), and Germany (8.5%). [13]

Table 1: Turkey's Global Export Ranks

Category	World Rank	Exported value in 2019, in thousand USD	Exported value in 2020, in thousand USD
Rawhides and skins (other than fur skins) and leather	21	234,100	155,984
Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silkworm gut)	27	351,246	284,832
Footwear, gaiters and the like; parts of such articles	26	958,454	829,448

Source: ITC calculations based on TURKSTAT statistics. Generated on August 12, 2021 on www.trademap.org

While Turkey's role in the world market may appear small compared to other large exporters, this changes when looking at specific market segments and dynamics over the last years. For the category of "[t]anned or crust skins of sheep or lambs, without wool on" (wet blues or crust) for example, Turkey ranks fourth in exports worth nine million USD, with annual growth numbers of 16 (value) and 21 percent (quantity) between 2016 and 2020. [14]

[13] Source: ITC calculations based on Turkish Statistical Institute (TURKSTAT) statistics. Generated on August 12, 2021 on www.trademap.org

[14] Source: Trademap https://www.trademap.org/Country_SelProduct.aspx?nvpm=1%7c%7c%7c%7c%7c4105%7c%7c%7c4%7c1%7c1%7c2%7c1%7c1%7c2%7c1%7c1%7c1

Looking at footwear production, Turkey ranks sixth with 2.4% of the world share and 487 million pairs, whereas 10% were leather shoes. In comparison to the global drop in footwear production due to the pandemic induced recession, the decline in Turkish production was comparatively smaller in 2020. With this, Turkey has also become the fifth important exporter of shoes globally. Until 2020, Turkey has already been steadily increasing exports and improving its rank as world exporter of footwear (APICCAPS, 2021). Among the top producers of footwear, Turkey is among those with the smallest export price with \$2.78 on average (in comparison: the average price for a pair of shoes from Bangladesh was \$13.08, from Italy \$60.43).

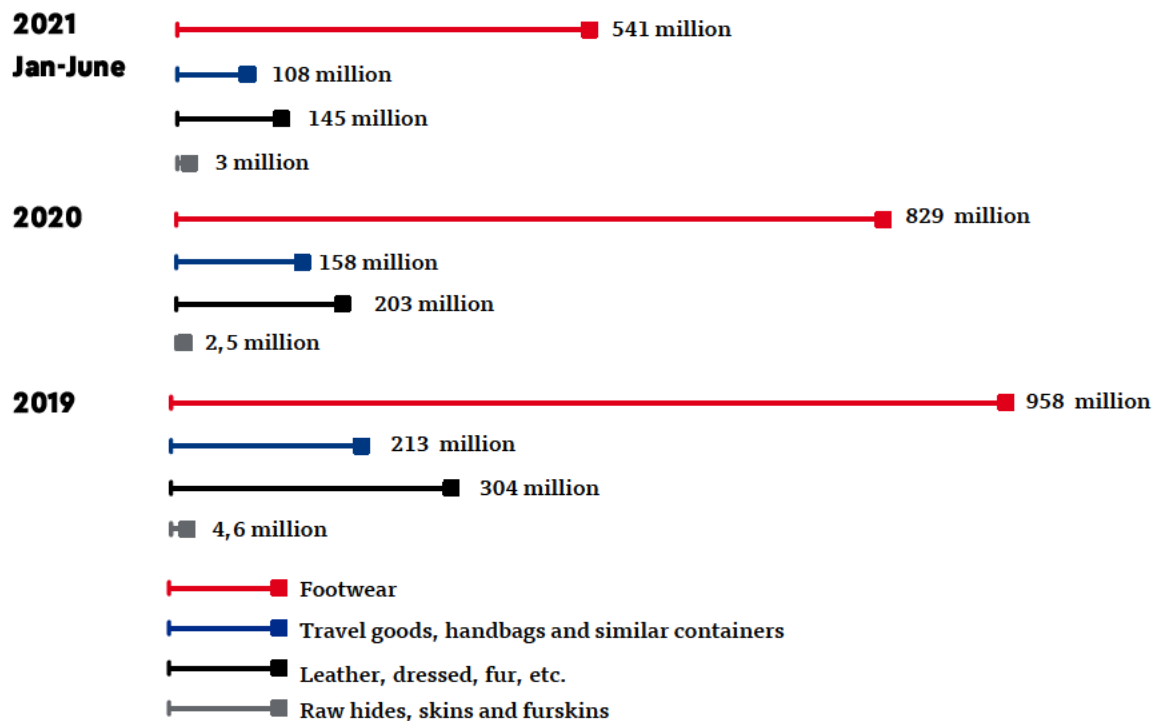
Nevertheless, during the first year of the pandemic, many factories and workplaces either could not run at full capacity or at all due to preventive measures (social distancing, hygiene and sickness protection, curfews etc.), and quarantines. Turkey, like most countries, encountered challenges, difficulties and deficits in importing and exporting raw materials and goods, which led to business closures, work terminations and even willing or unwilling cuts of wage payments. Turkey's foreign trade statistics in general and leather and leather products export numbers in particular display the pandemic's impact. Turkey's total exports decreased by 6% in 2020 compared to 2019 (from 180 billion to 170 billion). However, in the first six months of 2021, the value of exports already reached 121 billion which is equivalent to 62% of total value of exports in 2020. [15] The first six months of 2021 together with data of 2020 and 2019, displays the impact on the TCLF sector. Leather and leather products export volume declined as well in 2020 compared to 2019; from 1,5 billion USD to 1,2 billion USD, as reported by the Standard International Trade Classification (SITC) and International Standard Industry Classification (ISIC).

This was a 19% decrease. However, in the first half of 2021, the exported value of all leather and related products was recorded as 798 million USD, which was 0.8% of all Turkish exports done within this period and 67% of the leather and related products

[15] Source: TURKSTAT Foreign Trade Statistics, June 2021

exports achieved in 2020 (Graph 1).[16]

Graph 1: Turkey Foreign Trade Statistics: Leather and Leather Products Exports by SITC (2019 – 2020 – 2021)



(r) Data revised. Source: TURKSTAT Foreign Trade Statistics, June 2021 (published on July 30, 2021)

The İstanbul Textile and Confection Exporters Union (İTKİB) declared that “Most important export market was Russia [... value of 75.5 million USD; share of Turkey’s total leather and leather products export 8.1%]. Second [...] was Germany [... 73.2 million USD, share of 7.8%]. [...] Italy ranked 3rd [51.8 million USD, 5.5% share]. The share of shoes and accessories in total leather and leather products exports was 62.3% in the January-July period of 2021.

The leather and leather products sector in Turkey is also dependent on imports due to the insufficient supply of raw leather [17] production and is consequently affected by raw leather prices.

[16] Meanwhile, Turkish Exporters Assembly (TİM) which is the umbrella organization of 61 Exporters Associations in Turkey, representing more than 95 thousand exporters with 27 sectors, declared the annual export figures for leather products including TİM’s data for July 2021 as 938 million USD. <https://www.tim.org.tr/tr/ihracat-rakamlari>

[17] Raw leather describes animal hides and skins which may be conserved, mostly with salt, but not tanned yet.

Turkey reached 959 million USD imported value in 2020 in leather products. In the first half of 2021, imported value of manufacture of leather and related products recorded as 486 million USD.[18]

Geographically, leather manufacturers are mainly located in İstanbul (Tuzla district), İzmir (Menemen district), Tekirdağ (Çorlu district), Uşak, Denizli, Bolu (Gerede district), Bursa, Balıkesir (Gönen district), Isparta, Hatay and Manisa (Kula district).[19] Footwear manufacturers including small workshops manufacturing leather parts of shoes and other shoe parts are concentrated in İstanbul, İzmir, Gaziantep, Konya, Clocktower and Hatay (Ticaret Bakanlığı, İhracat Genel Müdürlüğü, 2021b). “According to the Turkish Ministry of Trade, about 70% of the [footwear] production in the sector is carried out by semi-mechanized production processes and almost 15% of production is hand-made” (World Footwear Yearbook 2021: 125). İstanbul and İzmir are considered as the most important trade centres for the Turkish leather wear industry. Turkey exhibits its leather wear collections, capacity and products in major leather fairs which are mostly organized in İstanbul (Map 1).

Unfortunately, the Ministry of Trade’s Tradesman and Artisan Data is not updated; the latest data on number of workplaces by profession, and on geographical distribution of tradesman, workplaces and demographics are dated back to January 2016.[20] Therefore, official data collected and announced monthly by the Social Security Institution (SSI) is the only existing source on labour force statistics.

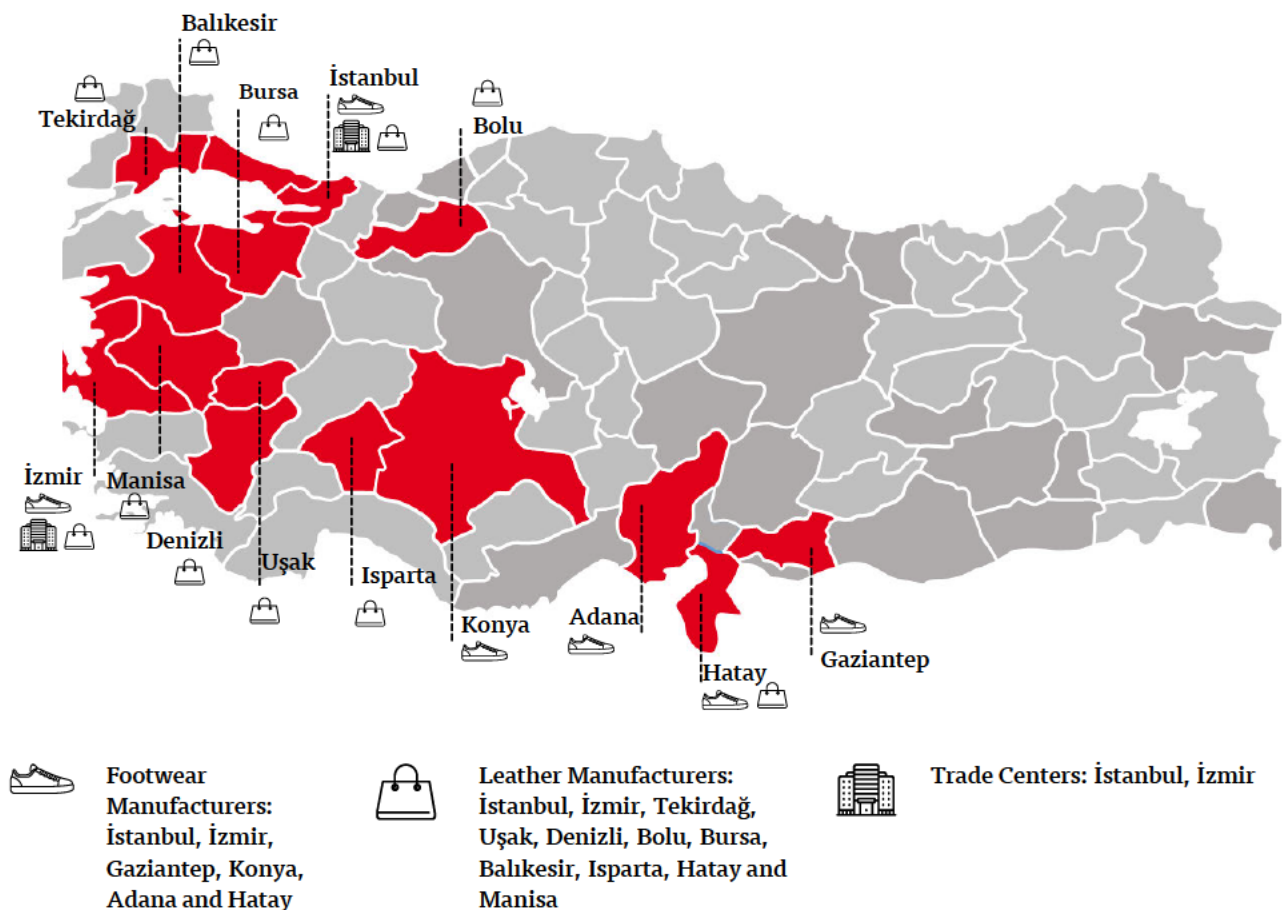
[18] Source: ITC calculations based on TURKSTAT statistics. Generated on August 12, 2021

[19] Ticaret Bakanlığı, İhracat Genel Müdürlüğü, 2021a.

[20] <https://ticaret.gov.tr/data/5d774a8313b876bdfcd7c334/8-491%20Meslek%20Koluna%20Gore%20Isyeri%20Sayilari.pdf>
<https://ticaret.gov.tr/data/5d774a8313b876bdfcd7c334/6-illere%20Gore%20Esnaflar%20Isyeri%20ve%20Nufus%20Bilgileri.pdf>

Hence, these figures represent workplaces and persons registered to and recorded in the national social security system, excluding employers and employees of the informal economy. According to the SSI May 2021 Bulletin of Statistics on Social Security, with regards to leather and related products manufacturing, SSI counts 6,884 workplaces [21] and 71,680 insured persons, registered to and recorded in the national social security system, whereas the workplaces registered with less than 50 employees make up 96.8%. [22]

Map 1: Provinces Where Leather and Footwear Manufacturers Concentrated in Turkey



[21] SSI used the term workplace not company/enterprise or employer in line with Turkish Labour Law No.4857. Definition stated as Workplace: It is the place where the insured persons do their work together with the tangible and intangible elements.

[22] Data generated in SSI Data Application on August 12, 2021 <https://veri.sgk.gov.tr/>

As described above, leather production often bears high risks for its workforce and OHS has been identified as an important area for necessary improvements. The Ministry of Labour and Social Security (MoLSS) OHS expert Nilay Akyol's thesis (2016) underlines that in the footwear manufacturing sector, the intensive use of chemicals and the large variety of machinery and equipment, technological and economic shortfalls, and a weak safety culture create many OHS risks. MoLSS, Directorate of Occupational Health and Safety, has implemented a project on the Improvement of Occupational Health and Safety Conditions at Workplaces in Turkey (İSGİP) aimed at improving conditions at workplaces in the textile, leather, and furniture manufacturing sectors, among others, and to establish sector specific OHS management systems in Turkey. As project outputs, in 2017, the Guide on Occupational Health Surveillance Guide in the Leather Manufacturing Sector was prepared and the Occupational Diseases, Occupational Diseases Diagnosis Guide was updated to include the sectors mentioned above. These publications list all the risks of leather goods manufacturing and relevant actions and precautions to be taken.

Findings displayed in a Hak İnsiyatifi 2017 Report on the sole (of shoe) manufacturing sector and the Deri, Tekstil ve Kundura İşçileri Derneği (Leather, Textiles and Saddlery Workers Association) 2020 Report on leather, textiles and saddlery manufacturing jobs include OHS risks. Another report from the Association released in 2020 on occupational diseases in the sector adds more details:

Protective and preventive OHS measures are not taken in the workshops. Due to the informal employment, neither OHS inspections and measurements nor periodic health checks of the workers are carried out. The majority of the workers are not informed about the necessary measures, and necessary trainings are not given. [Workers] work with cutting and piercing tools, toxic chemicals and dangerous machinery. [...] Due to the chemicals used while working, workers suffer from [health problems in the] respiratory tract, anaemia, cancer, nervous system and skin diseases. Long and heavy working conditions cause damage to the musculoskeletal system and hearing, such as waist-neck hernia.

The National Context

To contextualize the rapid assessments' findings, the following sections introduce relevant labour laws and the situation regarding child labour, migration and the labour market, and the Covid-19 pandemic in Turkey.

Labour Regulation Related to Leather Production Sector in Turkey

The Turkish Labour Law No. 4857 is the main legal instrument and framework that regulates the working conditions and work-related rights and obligations of employers and employees working under an employment contract.[23] In 2013, MoLSS, Labour Inspection Board published a Report on Programmed Inspection for Improving Working Conditions in Weaving and Leather Industry which covered Uşak, Zonguldak and Karabük provinces. The following problems and noncompliance with the labour law were detected:

- Daily and weekly working hours are above the legal standards (Article 63. 45 hours maximum weekly. Unless the contrary has been decided, working time shall be divided equally by the days of the week. Daily working time must not exceed 11 hours. Article 104.), rest breaks are not determined or not used during the day (Article 68. a fixed rest break approximately in the middle of the working day.),
- Night work/shifts are over 7,5 hours, shifts are not changed in accordance with the provisions of the law (Article 69. The employee whose shift will be changed must not be engaged on the other shift unless allowed a minimum rest break of eleven hours.),
- Workers' consent is not obtained for overtime work, compensatory wages are not paid (Article 64, 41),

[23] A number of other national laws and directives are relevant for workers' rights in the sector, namely the Turkish Social Security and Universal Health Insurance Law No. 5510, Occupational Health and Safety Law No. 6331, Law on Unemployment Benefit No. 4447, Regulation on Short-Term Employment Allowance, Regulations on the Fundamentals and Principles of the Employment of Children and Young Workers, Law on Work Permits of Foreigners No. 4817, Law on Foreigners and International Protection No. 6458. The administrative fines of employers, who violate the provisions of the Social Insurance and General Health Insurance Law No. 5510, are clarified with the announcement of the Minimum Wage in 2021. Accordingly, SSI Administrative Fines are being published annually; for 2021 Administrative Fines see <https://turkishlaborlaw.com/news/business-in-turkey/2021-ssi-administrative-fines/>

- Failure to use or incomplete use of weekly rest days, holidays, annual paid leaves exist (Article 46),
- Problems exist related to wages such as non-payment, incomplete payment, illegal payment (Article 32-40, 102), non-payment of wages on national and public holidays (Article 47, 103),
- Demands and allegations about unregistered employment and wage payment have intensified.

Another important regulation in terms of labour standards is minimum wage calculations. In December 2020, the MoLSS had declared minimum wage for 2021 as gross 3.577,50 TRY and net 2.825,90 TRY for a single and childless worker. The cost of the new minimum wage to the employer is 4.203,56 TRY.[24] Meanwhile, according to the Confederation of Turkish Trade Unions (TÜRK-İŞ), in July 2021 for a family composed of four, the limit for not experiencing hunger was 2.903,41 TRY and the limit for poverty was 9.457,36 TRY. For a single person, the cost of living wage was 3.546,22 TRY.[25]

Child Labour in Turkey

The ILO describes the term child labour as “work that deprives children of their childhood, their potential and their dignity, and that is harmful to physical and mental development.” In the Turkish law, the term child labour was defined in the Article 71 of the Regulation on Employment of Child and Young Workers based on the Turkish Labour Law No. 4871 as “a child worker is an individual completed 14 years of age and not yet completed 15 years of age, who has completed primary schooling; a young worker is a worker older than 15 years and not yet completed 18 years of age”. In line with the amendment made in 2013 based on the Occupational Health and Safety Law No. 6331 and Article 71, a new classification that determines the jobs that child and young workers can and cannot do according to age groups has been created. Regulation on Heavy and Hazardous Work No 24494

[24] Temporary Protection Regulation, the Directive Regarding the Work Permits of Foreigners under Temporary Protection (2016/8375) Article 10 (1) states that “foreigners provided with temporary protection cannot be paid below the minimum wage”. The rights and work permit of foreigners under temporary protection are secured by various legislations, but Syrian migrants are generally employed informally in jobs with low wages, without any social security protection.

[25] <http://www.turkis.org.tr/LIMIT-OF-HUNGER-AND-POVERTY-JULY-2017-d8550>

states that “young workers who completed 16 years of age and not yet completed 18 years of age are not allowed to work” in the jobs listed in the chart annexed to the regulation. Young workers who completed the 16 years of age and graduated from vocational schools teaching these professions may be employed in the respective heavy and hazardous jobs provided that health and security is assured for them. Moreover, with the amendment of the Primary Education and Education Law No. 6287 in 2012, the duration of compulsory education was increased to 12 years (age six to 18).

Turkey is a party to the United Nations Convention of the Right of the Child as well as ILO Convention No. 138 (Minimum Age Convention) and No. 182 (Prohibition and Immediate Action for the Elimination of the Worst Forms of Child Labour). The Time-Bound Policy and Program Framework for the Prevention of Child Labour developed by Turkey in 2004 based on this Convention was revised in 2017 and became the National Programme on the Elimination of Child Labour (2017-2023). While Turkey's population was reported to be 83,614,362 people by the end of 2020, 22,750,657 were children, which is 27.2% of the whole population (TURKSTAT, 2021). The latest Child Labour Force Survey of TURKSTAT [26] provided that 720,000 children between the ages of five and 17 in Turkey engaged in economic activities, whereas 70.6% of working children were male and 29.4% were female. 23.7% of the working children took part in the industrial sector. 63.3% worked as regular or casual employees, 36.2% of them worked as unpaid family workers and 0.5% of them worked self-employed. However, the research sample did not cover the informal sector which does not register with SSI. Moreover, Syrian children between the age of five to 17 (whose population had been estimated to be 1,245,220 by the Ministry of Interior, Directorate General of Migration Management (DGMM) as of July 29, 2021 [27] were not included in the sample. There is no statistical information

[26] “The research called Working Child Statistics was conducted in the IV. Quarter of 2019 (October-November-December) with the Household Labour Force Survey for 5-17 age group children. This research includes differences in terms of scope and methodology with the previously conducted Working Child Surveys. These differences are the arrangements in the 2014 Household Labour Force Survey structure and the inclusion of the 5-17 age group on working child statistics of the International Labour Organization. The term working child refers to children engaged in economic activities.”

on Syrian children under temporary protection who are engaged in economic activities. However, an increasing number of studies and media coverage document Syrian child labour in various sectors in Turkey (for more information see Save the Children and UNICEF, 2015; Save the Children, 2021; Lortoğlu and Kurtulmuş, 2020).

As shared in a Rapid Assessment on Child Labour in Footwear Manufacturing in İstanbul, İzmir, Gaziantep, Konya, Adana and Hatay, “child labour is present in various stages of footwear manufacturing. As [the] industry [...] relies upon small-sized enterprises and informality is intensive. [I]t is a common practice for families to put their children to work [...] not only as apprentices to learn a profession [...], but also to [...] earn money.”[28] Similarly, Yonca Elma’s research conducted in April 2018 in İstanbul documents child labour in the sector.[29] There is no research, data, or report that can be taken as a reference point for child labour specifically in the leather and leather products industry. Both national and global news coverage regarding the situation in Turkey is also very scarce.

Master-apprentice relationships have been a part of the small scale business culture in Turkey since the 13th century. Masters’ (usta) transfer their professional knowledge and experience to their apprentices (çırak). Those terms are still relevant today. In 1986, Law No. 3308 on Vocational Education (changed in 2001; former name was Law on Apprenticeship and Occupational Training [Law No. 3308]) explicated that “apprentices are not workers but students” (Bostancıoğlu and Dinler, 2017). With the Law No. 6764 of 2016, vocational education was included in the scope of compulsory education, thus moved from a non-formal education classification to the national, formal education system.[30] Though the regulation

[27] <https://en.goc.gov.tr/temporary-protection27>

[28] Development Workshop Cooperative, 2019.

[29] Hak İnisiyatifi, 2019. Akdeniz, 2017. Dertli, 2017. are the other related studies which also have a reference section that lists relevant literature.

[30] The Law on Vocational Education asks for completion of secondary school and states that a person of at least 14 years of age, but less than 19 years of age can participate in vocational training. Candidate apprentices and apprentices receive their practical training at the workplaces and their incomplete practical training and theoretical training at vocational and technical education schools and institutions, or in the Vocational Training Centers endorsed by the Ministry of National Education. Theoretical and practical training are planned and conducted to complement each other.

and education system is designed for preventing exploitation of children's labour in the informal economy's MSMEs in various sectors, the distinction is not as clear in practice. Research has shown that children's employment under the name of apprentices is prevailing in many sectors including footwear manufacturing. Erder and Lordoğlu (1993) call this informal on-the-job occupation training system "pseudo-apprenticeship". According to their research conducted in İstanbul with small scale enterprises manufacturing metal products, textile and apparels, "[employers] expect traditional master-apprenticeship relationships without taking any responsibility for the children they employ" (1993: 7).

Migration and Migrant Workers in Turkey

Turkey hosts more than 3.69 million Syrians under temporary protection [31] and around 330 thousand international protection applicants from Afghanistan, Iraq, Iran and other countries.

Gaziantep, Hatay, İstanbul, Şanlıurfa are the provinces with particularly high Syrian population.[32] As the World Bank remarks in its recent feature published on June 22, 2021, "[t]he magnitude of the refugee influx from Syria is nothing that Turkey could have prepared for". Still, the government of Turkey both with its central and local level public agencies and municipalities in collaboration with 3RP (Regional Refugee and Resilience Plan) partners and sector working groups as well as the European Union (EU), the World Bank and various international and national NGOs, has been trying to follow a development-oriented response, long-term solutions and a resilience plan. That included both humanitarian assistance for housing and welfare, outreach and referral activities, and access to national systems such as health, education, employment, and social services. The Conditional Cash Transfer for Education Programme and Emergency Social Safety Net are among the fundamental operations.

[31] According to the Temporary Protection Regulation 2014/6883; those citizens of the Syrian Arab Republic, stateless persons and refugees who have arrived at or crossed the borders of Turkey from the Syrian Arab Republic individually or en masse since 28/04/2011 on account of the events in the Syrian Arab Republic for the purpose of temporary protection have been taken under temporary protection even if they have applied for international protection. Syrian refugees in Turkey are registered by the Turkish authorities which forms the legal basis for access to public services, including medical assistance and education. It is not equivalent to the residence permit (ikamet)

[32] <https://data2.unhcr.org/en/documents/details/86055>

Syrian's integration into the Turkish labour market, the respective working conditions as well as employment practices have been addressed in numerous studies and publications[33] which mostly focus on the situation and the lessons learned about the access to work permits [34] and formal employment, with greater objective to reach self-reliance with livelihoods opportunities. For instance, the Participatory Assessment on Livelihoods and Access to Job Market, conducted by UNHCR and partners in 12 provinces of Turkey, in September-October 2018, documented difficulties which Syrian's face in accessing the labour market: "They mentioned the language barrier, lack of information about their rights and competition for jobs as the main challenges".[35]

According to official statistics, between 2016 and 2019, a total of 132,497 work permits were issued to Syrians registered in Turkey, which includes renewals of already existing work permits. Prior to the pandemic, 84% of Syrian households reported having a working family member, but only around 16% have access to reliable work and 3% of workers are involved in formal jobs, with the provision of social security and a minimum wage. Current estimates indicate that approximately 800 thousand Syrians have been working informally and 45% of Syrians under temporary protection and other international protection applicants and status holders were living below the poverty line, including 39 percent considered to be multi-dimensionally poor.[36]

Luis Pinedo Caro in his article published in 2020 argues that "sectors like trade, construction and manufacturing, which have historically showcased high informality rates, became the main receivers of Syrian labour. One of these sectors stands out in terms of employment, TCLF provide jobs to almost one in every three Syrians." (2020: 13)

[33] Del Carpio and Wagner, 2015. Özcan, 2016. STL, 2016. İçduygu and Diker, 2017. Uçak, Holt and Raman, 2017. Kadkoy, 2017. Korkmaz, 2017 and 2018. Altıok and Tosun, 2018. Tören, 2018. Yılmaz, Karatepe and Tören, 2019. Kirişçi and Uysal Kolasın, 2019. Koca, 2019. Clean Clothes Campaign Turkey, 2019. Kayaoğlu and Erdoğan, 2019. Kayaoğlu, 2020. ILO, 2020b. UNDP, 2020. DRC, 2021. Karasapan, 2021.

[34] As of 2021, it costs 378,70 TRY to apply for a work permit for foreigners under temporary protection.

https://www.csqb.gov.tr/uigm/duyurular/2021_yili_calisma_izni_harc_tutarlari_ve_degerli_kagit_bedel/

[35] Turkey Regional Refugee and Resilience Plan (3RP) 2019-2020, Pg. 7-8 and 86-88

[36] UNHCR Turkey: 3RP Country Chapter 2021/2022. ILO, 2020b.

Tolga Tören (2018) shares insights from the “Syrian Refugees and Integration of Syrians Workshop” conducted in February 2017 in İstanbul with different stakeholders from Turkey and Germany. A fishbowl session was organized with female and male Syrian textile workers. During the session, many participants underlined “lower payment in comparison to Turkish workers, working without any social benefit, discrimination at the workplace and language barriers in finding job or in taking action against the abuses” (2018: 41). Emre Eren Korkmaz (2017) provides a comprehensive analysis on how the participation of Syrians in Turkey’s informal economy has changed the formal and informal employment in the textile-apparel sector. He argues that it is not possible to pay the living wage to workers and maintain an eight-hour working day if “these brands which place the orders also insist on lowering the prices of each product [...] The employment of Syrian refugees under informal and exploitative working conditions in this sense challenges the model of the supply chain management system.” (2017: 49)

Impact of the Covid-19 Pandemic in Turkey

“2019-nCoV” known as the Coronavirus spread to all continents and countries except Antarctica within a very short time. In Turkey, the first Covid-19 case was recorded on March 11, 2020. According to the most recent official weekly data announced by the Ministry of Health (MoH) for 7-13 August 2021, the total number of Covid-19-positive cases in Turkey was 6.039 million infected and the total death due to Covid-19 has exceeded 52 thousand. [37]

Although Turkey was hit hard by the pandemic, it was one of the few countries that experienced positive economic growth in 2020, with 1,8% increase in gross domestic product (GDP). However, vulnerabilities and economic disparities have worsened due to elevated inflation, a severely weakened TRY, and a high unemployment rate (T. C. Cumhurbaşkanlığı Strateji ve Bütçe Başkanlığı, 2021; TÜSİAD, 2021). IMF made note of Turkey’s remarkable recovery in May 2021, but also warned that “growth in Turkey became increasingly dependent on externally-funded credit [...] fuelled inflation and external imbalances, and external imbalances, and exacerbated pre-pandemic vulnerabilities

[37] <https://covid19.saglik.gov.tr/>

notably low reserves, large external financing needs, and dollarization.”[38]

As described for the leather sector above, the pandemic surely affected industrial operations. According to Turkish Labour Law, employers have certain rights regarding the contraction or termination of production due to the availability of raw materials, intermediate goods or commercial goods. In the Articles 42 and 64 of the Labour Law, the cessation of work due to force majeure leads to compensatory work for later. After the said situation is over, the employee can be asked to work more, provided that it does not exceed the legal working hours within the next two months. Within the scope of combating the negative impact of the pandemic on business life, the Turkish government tried to react to employers' stresses with regulatory changes affecting employer-employee relations. With the Law on the Reduction of the Effects of the New Coronary Infection (Covid-19) on Economic and Social Life No.7244, the statement of the employer became sufficient for short-term work allowance under Covid-19 (Coronavirus effective short work request), and approval was given without the Turkish Employment Agency's (İŞKUR) verification of eligibility. This is declared by İŞKUR as short working practice within the scope of “forceful reason arising from periodic situations arising from external effects”. As of April 17, 2020, employers were not allowed to terminate their workers (who are registered in the SSI system, hence “formally employed”) for three months. Workers who have been insured for the last 60 days, with at least 450 days unemployment insurance premium within the last three years, could receive short-term work allowance. During the period of wage support, the government paid the general health insurance premiums and the respective employees continued to benefit from health services, whereas no general health insurance debt was accrued.[39] The Covid-19 pandemic effective short-term work allowance and prohibition to terminate the contract ended on June 30, 2021.[40]

[38] IMF Press Release No. 21/169, June 11, 2021 “IMF Executive Board Concludes 2021 Article IV Consultation with Turkey”

[39] <http://iskanunu.com/portal/wp-content/uploads/2020/04/7244-Say%C4%B1%C4%B1-Kanun.pdf>

[40] For more information on all force majeure measures taken by the Turkish government see Yürekli, 2020.

Despite governmental actions, the deep, intersectional, and complex human rights problems such as child labour and informal migrant labour were riveted and deepened as a result of the destructive socio-economic impacts of the pandemic and disruption to formal education systems. As listed in World Bank's Turkey Economic Monitor of August 2020[41], between March and August 2020 poor households in Turkey experienced:

- Loss of income due to sickness or lockdowns: inability to make rental and utility payments,
- Lack of access to internet limits children's access to online education and hinders families' ability to access information on emergency services,
- Taking children out of school was one of the coping mechanisms and mitigation measures.

The UNICEF and ILO joint publication (June 2020) and ILO's info note (May 2020c) warn that all the achievements of recent years regarding the elimination of child labour, especially the worst forms, and the protection of children against such violation of rights are at risk. The loss of livelihoods of households, decrease in income, an increase in incurring debt, unemployment, underemployment, and deep poverty, lack of access to distant education and non-attendance have pushed more children and migrants to work, especially in informal jobs. Absence of equipment for online education, interrupted electricity supply and internet infrastructure problems and the internal migration of parents in search of jobs all increase the likelihood of children, especially from refugee, migrant, impoverished and rural communities, to permanently drop-out of education systems and join their parents as part of the workforce (Development Aid, 2021).

Rapid Needs Assessments on the impact of Covid-19 on migrant and refugee populations conducted in Gaziantep, Hatay, İzmir, and Şanlıurfa by International Organisation of Migration (IOM) Turkey Office in cooperation with the DGMM showed that 82% of

[41]World Bank, 2020a. Table 11: Vulnerabilities and coping mechanisms across different types of households.

of migrants and refugees had lost work due to pandemic in 2020 and majority (63%) had lost any hope of finding work. Meanwhile, the majority of the working ones stated that working conditions had deteriorated. Substantial numbers reported not having received their salaries while working. The majority of refugees are also unable to benefit from the short-time work allowance, since only a small proportion are in formal employment. The processing of work permits was interrupted as well; priority has been given to some specific sectors and to extensions of existing work permits, while new applications are on hold. [42]

Research Design, Methods and Participants

The rapid assessment aims for a first exploration to inform and stimulate further research and engagement. The report is meant to uncover problems and hypotheses on causalities, and to determine possible immediate intervention points and strategies. In order to learn about working conditions in the informal leather production sector and its impacts on individuals, semi-structured interviews were conducted, flanked by observations whenever possible. A desktop study was carried out with secondary data such as research reports, academic and non-academic articles, news reports, governmental and/or industry reports and briefing papers on the sector. An actor mapping of the sectoral stakeholders in Turkey was created using the secondary data and data derived from interviews.

Accordingly, semi-structured interviews with workers, employers and parents of child workers were conducted in İstanbul province Gedikpaşa and Bayrampaşa districts between 24 – 30 June 2021, in Adana 8 -12 July 2021 and in Hatay between 7 – 8 July 2021. Simultaneously, institutional interviews were held remotely via Zoom platform between 28 June – 15 July 2021. The key informants were identified with the referral method. The snowball method has an inherent risk of producing a biased sample due to use of the same network provided by the informants.

[42] UN Turkey, 2021: 90-192.

What is rapid assessment?

In the early stages of an emergency, multi-sectoral and rapid needs assessments are the most common ways to collect information safely and quickly. They assess the situation and the needs in the critical stage, e.g. right after a disaster, to determine the type of assistance and intervention required for an immediate response. Various data collection strategies used simultaneously allow for a quick and sound understanding of a particular social reality in a particular socio-cultural context (ILO-UNICEF, 2000). Rapid assessments can also be used to supplement or refine existing data (Ellsberg/Heise, 2005: 74). “[T]he objective is [...] to reflect [on] the diversity of situations and points of view from different sectors and actors. The method chosen is essentially qualitative, which does not exclude some questions with predefined answers” (ILO, April 2020a: 5-6).

However, trust relations are a vital necessity for conducting the interviews on sensitive information such as child labour, and the procedure was hence very instrumental in facilitating this process. The entry points were the field operations of STL which provided one-on-one contact, communication, cooperation and relationships with employers, parents, workers and institutions. The informants, especially workers and employers, were contacted at work or when they were available to meet. Hence it was possible to observe the working conditions and undocumented migrant labour.

No personal data was collected or stored while undertaking this rapid assessment. Particular care was taken to ensure that the interlocutors' identities would not be revealed in the report itself. In order to adhere to strict ethical standards in research, data collection and analysis, data collection was restricted to adults only. As far as children were concerned, the information was provided by their parents. No interviews were conducted with children under the age of 18. All interviewees (including remote zoom meetings) were informed about the purpose of the interview, about data protection, the usage of the data and the report, and they were asked for verbal consent to confirm their participation.

The interview guide was pretested over the phone with a migrant female worker and question sets were revised accordingly. After the first data collection activities had been completed in İstanbul,

some questions were amended. The research lead and STL staff conducted the semi-structured interviews separately. Qualitative and quantitative data obtained from in-depth interviews were documented in the forms of interview transcripts, observation notes, and voice recordings (when applicable). They were analysed by the research lead. Their interpretations were discussed with peer researchers in several online meetings.

Study, Regions and Participants

35 interviews with key informants were conducted in the provinces of Adana, Bursa, Hatay, İstanbul, and İzmir. Table 2 provides an overview of the actor categories, the respective number of interviews and their geographical distribution. Except for two interviews conducted on the phone, all interviews with workers, employers and parents of working children were conducted in person. The interviews with institutional representatives were held remotely. For this actor category, key organisations in the sector were identified through a desktop study and based on STL's field experience. Accordingly, 17 organisations from Ankara, Bursa, İstanbul, İzmir were contacted to arrange interviews. Ten institutions accepted the interview request; seven of them were interviewed (two of them from unions, one cooperative, one chamber, three NGOs).

Table 2: Number, Province and Type of Interviews Conducted

Type	Province	Number
Worker	Adana (4), Hatay (5), İstanbul (8)	17
Employer	Adana (2), Hatay (1), İstanbul (3)	6
Parent of child worker	Adana (4), Hatay (1)	5
Institutional representative	Bursa (1), İstanbul (4), İzmir (2)	7

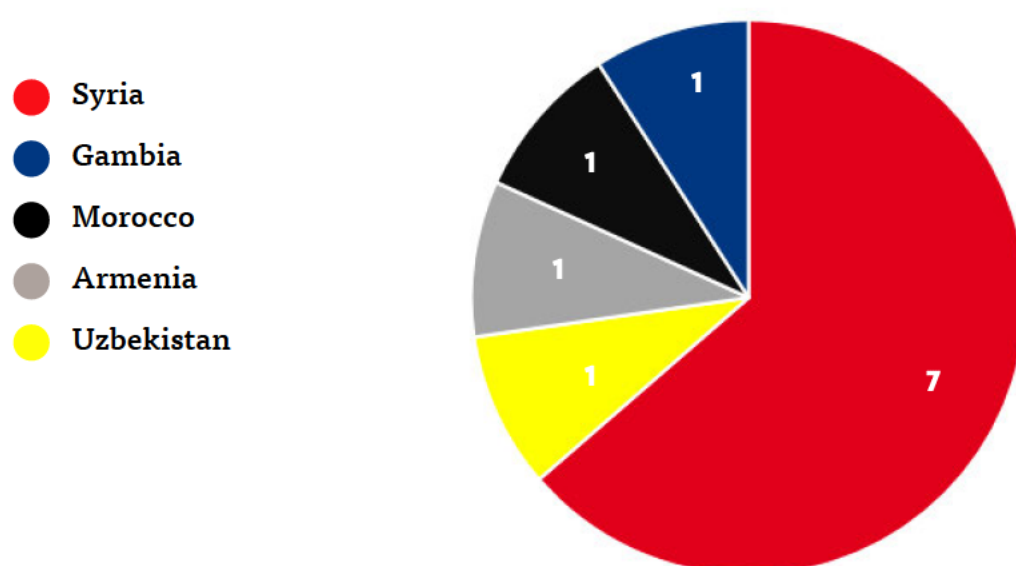
28 semi-structured interviews were conducted face-to-face by STL teams in İstanbul, Adana and Hatay. In İstanbul, six worker and two employer interviews were conducted in Gedikpaşa neighbourhood. Gedikpaşa is one of the main saddlery and shoe production centers in Turkey in addition to Mercan, Zeytinburnu, and Laleli neighbourhoods. These locations are also important wholesale centers.[43] Two workers and one employer were interviewed in the Bayrampaşa district of İstanbul, where the Leather Industry Site [44] (Muratpaşa Mahallesi Özdericiler Sanayi Sitesi) as well as many leather and footwear manufacturers and wholesale enterprises are located. In Adana, interviews with four workers and two employers, and in Hatay interviews with five workers and one employer were conducted. In Adana, small manufacturing workshops located around Shoemakers Bazaar near Clock Tower were visited. In Hatay, the STL team conducted interviews in tannery areas and shoe manufacturers' sites. Four interviews with parents of child workers were conducted in Adana and one in Hatay.

The average age of the adult workers interviewed is 33, ranging from 18 to 51 years. Thus, the study sample was relatively young. Ten workers were married, five were single and two were divorced. 35% of the adult workers interviewed (six persons) are citizens of the Republic of Turkey and 65% (eleven persons) are migrants. As seen in Graph 2, the earliest date of entrance to Turkey among the migrants was stated as 2001. The interviewed Syrian migrants in İstanbul disclosed the name of the province they had first entered the country from, but did not answer whether they were able to transfer their registration to İstanbul. Migrants in Adana and Hatay (four Syrians, one Moroccan) responded that they are registered with the provincial authorities. The variety in nationality, age and gender of the study participants provides insights regarding differences in problems and benefits which workers experience.

[43] Ticaret Bakanlığı, İhracat Genel Müdürlüğü, 2019a: 3. Şabudak, 2014. TMMOB Mimarlar Odası, İstanbul Büyükşehir Şubesi, June 2010. Müftüoğlu, 2010.

[44] Deri Sanayi Sitesi – Leather Industry Site is the name of the area where leather manufacturers are located.

Graph 2: Interviewed Adult Migrant Workers' Nationality and Entrance to Turkey



Of the adult interviewees, twelve work in the production of shoes, one in bag, one in belts production and three of them in raw hides and skins salting, tanning and piling. 30 % of the workers who participated worked with goat and sheep skins and leather. The size of the enterprises they worked in was mainly small, ranging from four (a sole manufacturing workshop in Istanbul and a shoemaking workshop in Adana) to 34 workers (shoemaking workshop in Hatay), with an average of ten workers. One female worker in footwear production works from home. 59% (ten persons) of the respondents are male and 41% (seven persons) are female. All female workers are employed in footwear manufacturer enterprises; one female worker is working in the manufacturer's wholesale shop next to shoemaking workshop.

Out of the five interviews conducted with parents of child workers, three of them are Syrians who entered Turkey in 2011, 2013 and 2016. All of the parents are working in shoemaking workshops besides their working children. They have twelve children in total. Ten of these children are within compulsory education age and seven continue their education as stated by the parents. During the interviews with these five parents, information regarding six boys who work in footwear manufacturing workshops were collected. Apart from one footwear manufacturing workshop in Hatay with 15 employees, workshops where the family members are employed are micro enterprises with 5-7 employees in Adana (Table 3).

Table 3: Workers Nationality and Age

No	Nationality	Age
1	Turkey	9
2	Syria	10 and 12
3	Turkey	11
4	Syria	15
5	Syria	16

Six interviews were conducted with employers or company representatives from the leather sector: three in İstanbul, two in Adana and one in Hatay (Table 4). A belt producer has 15 employees, all others are micro enterprises with three to seven employees with the employer himself taking part in the production.

Table 4: Interviewed Employers' Province, Type of Production, Production Volume

No	Province	Products	Production volume for year
1	İstanbul	Footwear	Sold most of the machines, now work only with one that cover rent costs only, no information on the volume
2	İstanbul	Bags	30-40 thousand bags
3	İstanbul	Belts	360 thousand belts
4	Adana	Footwear	40 thousand shoes
5	Adana	Footwear	40-50 thousand shoes
6	Hatay	Tannery	3 thousand raw hides and skins

Limitations

Due to the fact that the leather sector in Turkey is partly informally structured, the study universe is unknown and dynamic. No nationwide data on the actual number of workers and enterprises including MSMEs exists. The aim of this rapid assessment was not to form a representative sample or generalize results. Keeping in mind the difficulties in accessing key informants in this sector due to informality, undocumented work and legal status and the limitations on time and resources, it was planned to conduct remote and face-to-face interviews with key informants, building on existing trust relationships and networks.

No problems were expected concerning the quality of the data to be collected, limitations on context/unit, budget, timeline and access to research subjects. However, interview and information requests were nevertheless sometimes rejected or remained unanswered. Hence, some supplementary interviews were arranged. However, the number of interviews remains small and it is very likely that not all problems and their nuances in the sector are addressed.

Last but not least, the research findings might be particularly time-bound: First, the Covid-19 pandemic had large socio-economic and societal impacts. Second, the profile and working conditions of informal workers, for instance, might be entirely different in a couple of years in terms of the proportion and significance of Syrian workers among unregistered temporary workers of informal economy and child labour the waves of migration after the Syrian war yield a highly fluid informal worker population and vary and change throughout the process. Given the limitations, the report highlights the most pressing problems and raises questions for further research, which should be more extensive, both qualitatively and quantitatively.

Findings and Discussion

This rapid assessment focuses on the working environments and labour conditions in leather products manufacturing and on the challenges and problems of different worker groups with respect to age, sex, biographies, and legal status. The presentation begins with the situation of the workers, followed by that of the employers and perspectives of the institutional representatives interviewed. Two current external impacts on the sector, the Covid-19 pandemic and labour migration, are considered whenever relevant throughout the presentation of the empirics, but are also discussed in more detail in a separate section at the end of this chapter.

Working in the Leather Industry

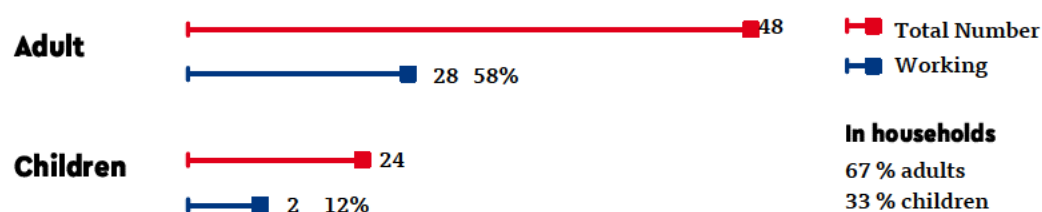
Interviews with 17 adult workers and five parents of six child workers display indecent working conditions, heavy workload, and lack of compliance to labour standards.

Cheap Labour

The data show that the interviewed workers earn very little, and that they live in households in which compensation of the low wages cannot be expected. Monthly total earnings of the adult workers interviewed are roughly 2.300 TRY on average. The lowest payment shared by the interviewees is 800 TRY (one working at home in footwear manufacturing, one in footwear wholesale) and highest is 4.000 TRY (working in belt manufacturing in İstanbul). In on-site footwear production, the individual monthly earning is around 2.400-2.800 TRY, whereas in tanneries monthly individual income is 2.000 TRY. (Table 5) Except for one interviewee (the one working in belt manufacturing in İstanbul), the adult workers indicated that they are paid weekly in cash. No difference was seen in terms of the amount of wage or payment date between Turkish nationals and migrants or male and female workers.

Eight adult interviewees earn the minimum wage as defined by the government (see section The National Context). Meanwhile, only two earn a living wage associated with TÜRK-İŞ's July 2021 findings. In addition, those earnings are insecure: In weeks when the employers do not employ them, employers are not solvent to pay the wages, or the production needs to pause, income is reduced or cut altogether. In the interviews, the workers repeatedly express their economic concerns (see also Box 1). For instance, a male worker from Adana (age 34, married with two children, Turkish) expresses his worries: "It is our most urgent need to get the wage we deserve for the work we do. Working and not being paid enough is a problem for us. It prevents efficient work. We work under stress, we cannot enjoy our work."

Graph 3: Number/Ratio of Working and Non-working Adults and Children in The Households' Adult Workers Live



The data reveals that neither short-term income shortfalls nor the long-term under-payment can be cushioned in the interviewees' households. The adult workers interviewed live in households with four persons per household on average. Some of the workers interviewed live with their relatives, friends or other families. Out of these 48 adults and 24 children living in these households, 28 adults and two children are working (Graph 3). As interviewees share their earnings with the whole household (or at least contribute to rent, water, electricity etc. costs), the number of persons in the household is important when interpreting the findings.



Table 5: Monthly Total Individual and Household Earnings of Adult Workers Compared to Nationality, Sex, Production Type and Number of Persons With in the Household

No	Nationality	Sex	Type of Production	Number of persons with in the household (n=72)	Monthly individual earning	Monthly individual earning	Monthly individual earning
1	Turkey	Female	Footwear manufacturing (stitching shoes and other tasks, at her home)	6	TRY 800	TRY 1,400	TRY 233
2	Turkey	Female	Footwear manufacturing (wholesale)	13	TRY 800	TRY 2,000	(inconclusive)
3	Syria	Male	Bag manufacturing	5	1,200 TRY	TRY 3,000	TRY 600
4	Gambia	Male	Footwear manufacturing (ortacılık)	2	1,200-2,800 TRY	1,200-2,800 TRY	(inconclusive)
5	Syria	Male	Raw hides and skins	11	TRY 2,000	TRY 5,000	TRY 455
6	Syria	Male	Raw hides and skins	4	TRY 2,000	TRY 2,000	TRY 500
7	Syria	Male	Raw hides and skins	5	TRY 2,000	TRY 2,000	TRY 400
8	Syria	Female	Footwear manufacturing	4	TRY 2,100	TRY 2,900	TRY 725
9	Uzbekistan	Female	Footwear manufacturing	1	TRY 2,400	TRY 2,400	TRY 2,400
10	Syria	Male	Footwear manufacturing	1	TRY 2,400	TRY 2,400	TRY 2,400
11	Syria	Male	Footwear manufacturing	3	TRY 2,800	TRY 2,800	TRY 933
12	Turkey	Male	Footwear manufacturing	4	TRY 2,800	TRY 2,800	TRY 700
13	Morocco	Female	Footwear manufacturing	1	TRY 2,800	TRY 2,800	TRY 2,800
14	Turkey	Female	Footwear manufacturing	4	TRY 2,800	TRY 6,000	TRY 1,500
15	Armenia	Female	Footwear manufacturing	1	TRY 3,000	TRY 3,000	TRY 3,000
16	Turkey	Male	Footwear manufacturing	3	TRY 3,500	TRY 7,000	TRY 2,333
17	Turkey	Male	Belt manufacturing	4	TRY 4,000	TRY 4,000	TRY 1,000

Stand in Workers' Shoes – Everyone struggles to make a living

Almost all adult workers interviewed shared their economic struggle for livelihood. They need cash urgently, to take it one day at a time. Their weekly payment is insufficient even for the essential needs. Still, they feel that they have to work in these low paid jobs to survive and to take care of their families. “Being able to take care of my children and my husband is my most urgent need. I have to make a living” one Turkish female worker with four children told us in Adana (age 38, married, Turkish). Another female worker in footwear manufacturing (age 28, married with 2 children, Turkish, in Adana) said: “The most urgent need is cash, like [for] everyone else. The money earned here is not enough. Something has to be done to address this need.” Meanwhile, migrant workers commented that their wages are even lower than that of their Turkish co-workers. For instance, a Syrian father of three children (age 35, married) who works with hides and skins in Hatay explains: “[A]s a migrant worker, being obliged to a lower wage is our biggest problem.”

Several interviewees express the general observation that the low wages that Syrians receive also have an effect on wages in the whole sector. A male worker producing footwear in Adana, who is 34 years old and married with two children reflects: “There is discrimination in the industry in general. There is no discrimination in our workshop, if there is, I did not notice. [But] it has been 8-10 years since the Syrians came. Before [...], we as Turkish citizens had better salaries. Our biggest problem is that wages have fallen. The negative impact on salaries is our biggest problem.”

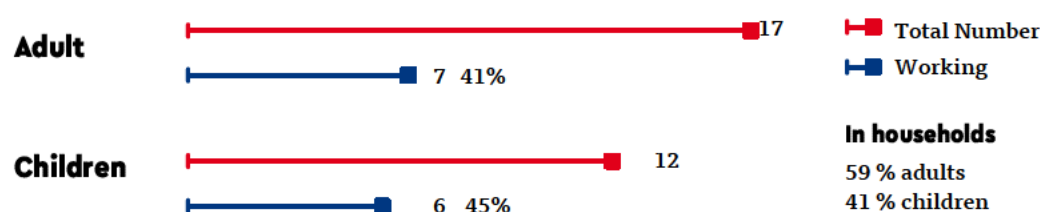
In comparison, child workers earn much less: Monthly earnings vary between 400 TRY and 1,600 TRY. (Table 6) They receive payments weekly and in cash. Different interviewees indicated that with the age of the child, the wage increases because with age, more tasks are being given. Working children are given errands such as making tea-coffee, grouping and packaging manufactured products, carrying end products to other workshops (called “ortacılık”) or less skilled jobs such as thread cleaning, gluing, cutting shoe uppers and soles, hand stitching (shoe, bag, belt etc.).

According to the data collected from the child workers’ parents, in total 29 persons live in the respective households: 59% adult (17 persons) and 41% children (12 persons). The average household size is 5.8 persons. This can be interpreted as a sign of crowded households. Out of these 17 adults and 12 children living in these households, it is stated that seven adults and of six children (all boys) are working (Graph 4).

Table 6: Monthly Total Individual Earnings of Child Workers Compared to Nationality and Age

No	Nationality	Age	Monthly Individual Earning
1	Turkey	9	400-500 TRY
2	Syria	10 and 12	not get paid for the work, they help their mother working at the workshop
3	Turkey	11	400 TRY
4	Syria	15	600-800 TRY
5	Syria	16	1.600 TRY

When asked “why did your child start to work?”, parents interviewed gave varying, sometimes ambivalent answers: to contribute to the household income, to learn the profession, earn pocket money and be occupied instead of staying home alone. One parent shared that “I want my child to earn money here and learn a job rather than staying at home alone. I am afraid if he meets the wrong people and does wrong things on the streets.” Another one who does not see child labour as a problem, said that “Children should go to school, but the children who do not want to study also have to learn a profession. Therefore, they have to work.” When asked about their most urgent needs, parents underlined that their children shall not work, but rather continue their education. However, as they are having financial hardship and difficulties in finding livelihood sources, their children have to work. The solution for this is stated by one parent as “I need to work harder to solve these problems. In this way, there is no need for children to work.”

Graph 4: Number/Ratio of Working and Non-working Adults and Children in the Households' Child Workers Live

Many interviewed workers and employers share the same view: children should learn a profession and “help the adult workers” after school hours or when schools are closed. Few workers and employers, in contrast, said that children are being exploited, do not work in safe environments and are not remunerated according to the work they perform. These working children at the end are at great risk of being trapped in the cycle of poverty like their parents, despite their parents’ wish for a different destiny for them.

Trapped and Invisible

Next to the concerns about their income, the interviews reveal the informants’ worry about the consequences of being employed informally, “not on the books”. Their work is to a large degree undocumented and in that sense “unseen”, with severe consequences such as the impossibility to use employment documentation in court cases. All the participants except for one do not have working contracts, meaning they work informally. One belt manufacturing worker has a contract and before the pandemic, he had social security. One shoe manufacturing worker said that she has insurance, though she also declared that she does not have a contract with her employer. Similarly, none of the migrant workers interviewed has work permits. Workers openly share that they do not have a contract or social security registration for access to public health and social welfare services, and even though this is at odds with the Labour Law standards, they do not consider it a problem. They see this as a “rule of the game” to be accepted because they need the job. As one worker puts it: “there is no such thing [contract/social security] in this sector” (see also section “Migration and Migrant Workers in Turkey”).

Given the very low wages and job insecurity, one may ask why the interviewees work in this sector. While this report cannot answer this question fully, part of the answer next to their economic deprivation might be the social dynamics such as how to find jobs which lead to those circumstances being perceived as the normal reality. Almost half of the adult workers (47%) interviewed have been working in these jobs for more than ten years. Three of these have started to work when they were children. Following the traditional social structure of small businesses in Turkey,

apprentices meet with their masters through their social circles: relatives, friends, neighbours. In line with this, the great majority of the interviewees (88%) found their job through relatives, friends, neighbours' reference. Two workers found their recent job by visiting the workshops and asking whether they are hiring.

That informal employment is considered as "normal" by workers, does not mean that the negative consequences are not seen. A Turkish female worker who is 51 years old and works in footwear manufacturing in Hatay, for example, addresses her concern to be terminated if she refused to work for very low wages after Syrians had entered the labour market in large numbers: "As a Turkish worker, there is a possibility of being fired and being replaced by someone else cheaper."

For some of the migrant workers, however, informality is the only option they seem to have to make a living under the given regulatory circumstances. As a 39 year old woman with two children who works in footwear manufacturing in Hatay explains: "My biggest problem as a migrant worker is that they see us as cheap labour. We do not register [for social security] because then our Red Crescent debit card (Kızılay Kart)[45] is cancelled." [46]

The participants were also asked about essential labour standards such as working hours during day and week, duration of lunch and other breaks, weekend, annual and holiday breaks, overtime, and sick leave, which are indicators of decent versus exploitative work. Only three workers in shoe manufacturing said that they work eight hours a day, which is the labour standard, but they have too much work for that time to take a break. The home worker replied that she sometimes cannot take any breaks during the day, given her domestic responsibilities at home. Half of the adult workers

[45] Emergency Social Safety Net - ESSN Programme is for families and individuals who are in need of assistance and not engaged in formal employment (do not have SSI social security record) <https://kizilaykart.org/EN/degerlendirme.html>. About ESSN <https://kizilaykart.org/EN/hakkinda.html>

[46] Work permits for wage employment for the Syrians under temporary protection (TP) are lodged by employers. Syrians under TP can only work in the city in which they are registered. If one finds employment in another province, he/she needs to apply at the Provincial Directorate of Migration Management to change his/her place of registration. Once this change has happened, the employer can apply for a work permit. With a valid work permit, Syrians under TP are entitled to the same rights as Turkish nationals; access to social security and insurance, and entitled to the minimum wage. <https://help.unhcr.org/turkey/information-for-syrians/livelihoods/>

(53%) replied that they are working from 8 a.m. until 8 p.m. and are given 30 to 45 minutes lunch breaks. Especially Syrian workers perceived the weekly working hours as very challenging and compared it to their working time in Syria. Accordingly, it appears that in shoe, bag and belt manufacturing, working more than 10 hours per day with just one break is common practice. Meanwhile, workers in the tanneries worked much less, with four to five hours a day, from 9 or 10 a.m. until 14 p.m.. Working children were reported to have mainly five working days a week and more than ten hours per day with 30 to 45 minutes lunch breaks.

Of the adult workers, seven said that they do not work on Saturdays, while the rest (59%) works on Saturdays until lunch time but if needed, “we come to work on official days when there is a need for production” (worker in footwear production in Adana). In fact, all adult workers work during public/national holidays (only one worker stated that he does so only when needed). Except for workers occupied with rawhides and skins, nobody works during religious holidays (Eid). For workers in tanneries, “Eid are part of it. Most work is done during the eid. But we get additional money [overtime].” especially for Eid al-adha [Feast of Sacrifice, most important religious feast for Muslims], as one interviewee explains.

When asked “who is working overtime if needed?”, the majority of adult workers said “everyone”. Since the payment is calculated according to the number of working days, most of them do not consider receiving compensation either financially or with paid time off. The adult interviewees who know what “overtime” should imply answer that they do not get compensatory time or payment, many however, do not really know what overtime is. Another misinterpreted concept is sick leave. One worker explained: “It is not a big deal [if you are sick], as it is not a regular income anyway. If you work, you will have money. If not, you receive nothing ”. 71% (12 persons) answered that they can stay at home when they are sick (which does not mean that they are paid for those days). Four of them in contrast said that they do not have such permission to have a day-off; if they are sick and cannot work, they do not receive payment for that day. Parents of child workers shared as well that children are paid for piecework. Thus, if they are not sick

to work, children go to work to earn money.

The intensity of the workload is another indicator of realising decent work. 41% (seven persons) of adult workers said their daily workload “extends over a period of time” (so that they have some flexibility throughout the day), another seven persons said their workload “is heavy that they work without [...] a break”. Only three workers, (all from footwear manufacturing) responded that their daily workload “is unchallenging”. Workers in tanneries commented that before the rawhide or skin goes bad, action shall be taken, and that makes their work challenging and usually, they need to be very fast.

Unprotected

The workers who were interviewed are not just unprotected regarding social security, they are often also considerably unprotected on the job. However, it is especially the interviewers’ observations which give ground to this finding. During the interviews that took place at the worksites, no use of personal protective equipment was observed. Box 2 recalls parts of an interviewers’ fieldnotes. The workers themselves often described their jobs as not dangerous; injuries are seen to be negligible or the workers’ own fault.

Stand in Interviewers’ Shoe – it is worse than it is told

Notes from fieldworkers, July 2021: The footwear manufacturing site in Adana is quite old and derelict, packed with many unregistered small scale producers. The ventilation system of the site is quite bad. There is a heavy chemical smell. Trash is not collected regularly. The workplaces at the lower floors, in the entrance of the site, look like a shoe store. But the situation at workshops on the upper floors is a complete disaster.

It is really difficult to go up and down, as the stairs are broken. In general, it is not a safe space. We observed that women have serious problems. There is just one WC and women go in pairs. While one of the women meets their needs inside, the other one watches the door.

The duration of breaks is one of the most surprising facts we observe. The lunch break varies between half an hour and forty-five minutes. There is no such thing as taking time to rest. There is no tea break, and no one is bothered by this. According to them, they already work sitting down and can drink tea or

coffee whenever they want. In fact, there is no awareness that rest is something separate and needed.

Child labour is extremely widespread. Parents are shy to talk about the problems experienced by their children. They are aware that child labour is wrong and so they seem to hide many facts. During the interviews, we also encountered the unfriendly attitudes of the employers. We saw their fear of exposing child labour. They are aware that child labour is a crime. Parents know the employers. Children are seen to be quiet, speechless and shy. They are proud of the work they do. We sometimes had the impression that being useful makes them feel good. For this reason, they may tend to be more willing to do heavy work.

OHS issues were raised during the interviews. Even though interviewers observed the risks and the sector is known to be demanding with regard to OHS measures (see section The Leather Sector), most of the workers (adults and parents of child workers) in shoe, belt and bag production said that they do not perform dangerous tasks since the only tools used are scissors, sewing machine or needles. Also, the conditions of the working environment were not seen as risky for workers' health. Some risks are mentioned but often relativized as if of minor concern:

"No high-risk occupational accident happened recently. However, there are simple abrasions, injuries, scratches etc."

"The sewing machine does not have eye protection, [but] the needle does not break in general."

"Sometimes we use masks and gloves when gluing with chemicals."

"We work in a dangerous environment of chemicals, dust, smoke. This negatively affects our health. I do not think that there is a dangerous situation regarding tools and machines, and if there is such a situation, it is immediately intervened."

"I do not think there is anything dangerous about my job. I work with the machine, but there is no danger. In general, smell, noise and chemical substances are heavily involved in our lives."

"There was no occupational accident recently. It is just that they [child workers] fall because of carelessness. Falls and minor injuries are ignored and not considered as occupational accidents."

In opposition, tannery workers consider that their work is harmful for their health since hides and skins are very heavy to lift and carry and have a strong and unpleasant smell. They report that since they wear rubber boots all day long, they may have foot diseases. When asked “whether occupational accidents happen”, one raw skin production worker said, “my co-worker cut his hand”, but another one replied that “There are only minor work accidents, but they happen due to carelessness.” When asked about urgent needs, workers in leather production requested protective equipment and improvements in their working environment with hygienic measures. Others including parents of child workers responded that workplaces are not healthy, secure and comfortable. Most of the workplaces are noisy, with a heavy smell of chemicals, too cold or hot inside without heating or ventilation systems. Female workers highlighted that apart from these problems, this male-dominated, unhygienic working environment in the sector is not suitable for them. Some of them have to bring their children with them to the workplace, since they have no one back at home to take care of their children. Though, prompting questions were asked to female workers to dig in whether gender-based abuse and discrimination are experienced, none of them explicitly shared such information as interviews had to be done while they are working. One female worker just said, “In my previous workplaces in different sectors, the attitudes of the bosses were bad because I am a woman, but I did not have a problem here.” While another one shared that “I am constantly told that this place is not suitable for a woman. I am having a trouble. Actually, I do not care what anyone says, in my opinion there is no problem with my work.”

As will be shown in more detail in the next section, in some instances, the relationship between the workers and their employees appears close, whereas employer and employee work side by side, responding to the same external demands. In one of the interviews, one of the adult workers explains where he sees the reason for his long working hours and workload as “Production should not be delayed, so the load is high. Of course, contracted institutions have expectations from the workshop, this creates a burden for us.” With regards to low wages, several workers responded that since product prices (footwear, belt, bags etc.) have

been falling, the level of wages has not increased which is causing unstable income for workers. Moreover, the main manufacturers determine the prices which need to be accepted by the contracted small producer (their direct employer). Prices are made on the basis of the piece mostly; production volume changes the profit of the manufacturer. Thus, employers push workers to manufacture products as much as possible and as fast as possible. One adult worker put this well in words; “If large workshop owners demand more products, we as workers and our employer will work harder so we can make a living.”

While interviewees are often also defensive about what they are doing and how they do it, they also express their wish for circumstances to change. These intolerable conditions are asked to be improved to have decent work as well as preventing work accidents or occupational diseases. In summary, the workers attributed the role of improving their situation to various actors, including the government as policy and decision maker, public agencies as implementing institutions as well as monitoring and inspecting actors in the sector, main producers, and employers.

Running a Small Business in the Leather Industry

Interviews with employers (all male) running micro or small businesses followed the same structure as the worker interviews: with the aim of understanding working and labour practices, problems, challenges and needs. As explained in the Research Methods section, interviews with employers were conducted in person. The tannery visited was established in 1950 and handed down from generation to generation. The other enterprises are 10-15 years old. Table 7 presents the details of the respective workforce in these enterprises with respect to gender and citizenship.

According to the interviewees' responses, the labour force mostly sews and stitches (whether handmade or by using machinery) in footwear, bag and belt production. In tanneries, salting, tanning and piling tasks are very labour-intensive. The following section shows that the employers are in agreement with workers in certain respects, while contrasting with the workers' perspectives in others.

Table 7: Number/Ratio of Workers Employed in Interviewed Enterprises

No	Product	Total Number of Employees	Number of Male Employees	Number of Female Employees	Number of Turkish Employees	Number of Migrant Employees
1	Footwear	3	3	0	3	0
2	Footwear	3	3	0	0	3
3	Footwear	5	5	0	3	2
4	Bags	6	4	2	6	0
5	Belts	15	12	3	15	0
6	Tannery	7	7	0	3	4

Precarious Work, Under Pressure

Matching with data collected in interviews with workers and parents, the employers find their workers through relatives, friends, current workers or neighbours' reference or with vacancy notice posted in the window of the workshop. From time to time, young people or parents also visit the workshops to ask whether they need workers. One employer answered that they apply to cooperatives and chambers to find workers without giving details on reason and process.

The employers interviewed pay their workers weekly and in cash. Only the belt manufacturer has contracts with his workers and pays monthly through bank transfer. Apprentices receive around 400-500 TRY, whereas masters are paid between 700 TRY and 1.000 TRY. (Table 8) As discussed in the prior section, those amounts are hardly enough to live decently in Turkey. However, our research indicates that most of the small scale producers which were interviewed in fact have little room to manoeuvre in order to improve the situation for workers due to the pressures they perceive. In several instances, employers work side-by-side with their employees. "All of them have been with us for years, there is a brother-sisterhood. Workers' rights are not violated. They are cared about here."

Even though Syrians are high in number in terms of labour force in the sector and available in all provinces and regions where the production exists, most of the Turkish employers stated that they do not prefer to work with Syrians specifically. One employer from İstanbul, Gedikpaşa, who has Syrian employees as well, said that “We did not prefer to employ migrants. What is the need when we have our own people?”. Though they do not “prefer” to employ Syrians, they also underlined that it has become hard to find local workers including child workers to undertake such 3-D jobs. The tanner explained that “When the migrants came, Turkish workers did not like the salary given to the migrants and resigned.” While more details are shared under the “External impacts on the sector: the Syrian crisis and Covid-19 pandemic” sub-heading of this report, these statements demonstrate the perception and assumptions that “Syrians are taking our jobs” or “Unemployment increased after Syrians came” are still strong in the year 2021, also among some of the employers interviewed. Syrians on the other hand accept such 3-D jobs as a survival, livelihood strategy. Child labour in the sector is a well-known phenomenon as displayed in several research mentioned in the above section “Child Labour in Turkey”. Although interviewed employers stated that they do not employ children, they added that “child labour existed in the past, but after making compulsory education 12 years, apprentices left the sector”. Though, some employers and institutions interviewed mentioned about this extension of schooling age as a factor of decreasing child labour supply, some indicated that 13-14 years old boys work in the sector, mostly in sole manufacturing.

Table 8: Wages of Workers in Enterprises Interviewed

No	Type of Production	Wage
1	Footwear manufacturing	500-600 TRY weekly
2	Bag manufacturing	400-700 TRY weekly
3	Belt manufacturing	3.500-4.000 TRY monthly [47]
4	Footwear manufacturing	400-750 TRY weekly
5	Footwear manufacturing	500-1.000 TRY weekly
6	Tannery	No response

[47] Employer did not share explicitly whether this is net or gross amount being paid to employees.

Employers' responses regarding labour standards and working conditions also contain similarities with worker interviews. Only the belt manufacturer with 15 employees expressed that workers have contracts and social security. Thus, in six enterprises interviewed, workers neither have a contract, nor social security record. Employers explained that they make verbal agreements: they discuss the working conditions from the very beginning, both parties accept these conditions and employees start to work. The tanner said that Syrians do not want insurance since that would cancel their Turkish Red Crescent debit card (Kızılay Kart).

In shoe, bag and belt manufacturing enterprises, the average working hour per day is around eleven, ranging from nine to twelve hours. The tanners responded that they work three hours. Similar to workers' responses, employers replied that lunch break is approximately one hour. In some workshops workers are given short tea or smoking breaks. However, it was also observed during some interviews that workers may smoke (inside the workshop) while they are working. One employer shared that "There is no need to take a break during the day. We are already sitting down. We take our tea and coffee, and drink it while we work." Half of the enterprises where the employers were interviewed run on Saturdays, while all of them work during national/official holidays. Depending on the workload, if a deadline for orders approaches, work on Saturdays until noon and on national holidays is seen as normal rather than as overtime. Religious holidays (Eid) are the most intensive working days in the tannery (Table 9).

Like workers, employers seem to misunderstand and misuse the meaning of overtime. When asked "who is working overtime if needed?", five employers said "everyone". They see it as finishing up the work, keeping the flow of production and completing the order, not considering any compensatory payment. However, all interviewed employers reported that workers may take sick leave without deductions from their wage while the interviewed workers said they may not receive payment for that day.

Table 9: Production Type, Working Hours Per Day, Days Per Week, Number of Breaks in Enterprises Interviewed

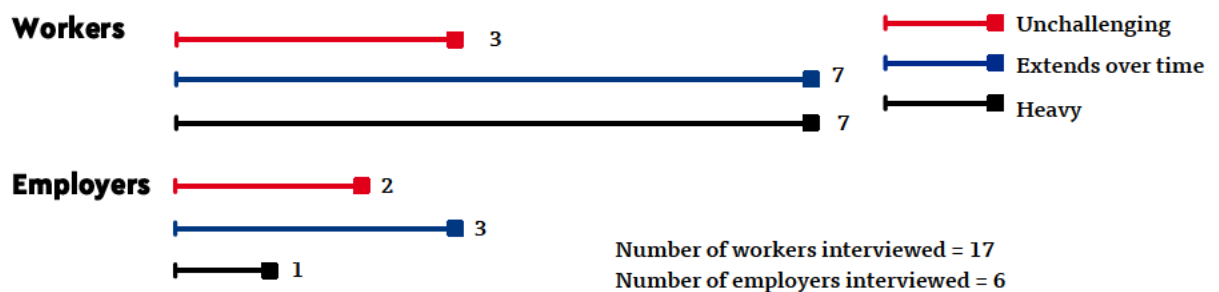
No	Type of Production	Working Hours Per Day	Working Days Per Week	Number of Breaks Per Day
1	Footwear manufacturing	12	6	1 (one hour lunch) (smoking break determined by workers)
2	Footwear manufacturing	12	6	1 (30-45 minutes lunch) (drink tea/coffee while working)
3	Bag manufacturing	11,5	5	1 (one hour lunch) (smoking break determined by workers)
4	Belt manufacturing	9	5	3 (45 minutes lunch, 15 minutes tea breaks)
5	Footwear manufacturing	9	5	1 (30-45 minutes lunch) (tea break determined by workers)
6	Tannery	3	6	1 (one hour lunch)

When asked about the workload within a day, three employers said workers' daily work "extends over a period of time", two said the work "is unchallenging" and one in footwear manufacturing replied that their workload "is heavy that they work without giving break". On the contrary, workers from leather production replied that they work hard and fast. Graph 5 shows the responses of both workers and employers to enable comparison.

With regards to OHS and occupational accidents, especially the belt manufacturer who exports to Germany and takes part in periodic inspection processes, seems to be a very hygienic and spacious workshop with indoor OHS measurements. But the situation in other enterprises visited, is incompatible with decent work: hygiene and cleaning conditions are not paid much attention, production areas are overcrowded and unventilated. Employers interviewed commented that their work is not dangerous and that they do not require protective equipment. On the contrary, they even say, "the sewing machine is not unsafe, the eye protector prevents [proper] working" or "we do not feel a need to use mask and gloves." Employers told that no occupational accidents happen, but in such cases, the employer takes the worker to the hospital or "does necessary intervention". It was not clearly indicated what they mean by intervention, whether they know first aid or have a first aid kit at the workplace, or whether they cover the health costs and compensate for the loss of earnings of the worker injured.

Lastly, employers listed workers' alarming problems as: irregular employment, absence of social security registration, need for cash for urgent needs, lack of job opportunities, low wages and financial hardship. They believe that in order to solve the problems of the workers, the support shall be given to producers. "The more we profit, the possibility that workers earn more, increases. [Otherwise,] this is a vicious circle." One employer underlined that unions and NGOs are needed for representing leather workers and defending their rights.

Graph 5: Workload Density of Workers According to Interviewed Workers and Employers



These organisations shall also include migrants, too, without discrimination. On the other hand, two employers interviewed, however, replied that Syrian workers find work, whereas local workers (Turkish nationals) either do not want to work in footwear manufacturing or cannot find a job since wage payments decreased due to the Syrian labour force.

In summary, the data collected from interviews with workers (including the parents of child workers) and employers show that most workers in small scale shoemaking, belt and bags manufacturing and in the leather production are employed informally without written contract and social security registration. Working for long hours in workplaces do not comply with decent work and labour standards, and contain OHS risks. They earn very low wages that are being paid weekly in cash. Adult workers may work on Saturdays and official holidays without overtime payment, and are given just 45-60 minutes break for lunch.

OHS knowledge and awareness of both workers and employers appears absent, as seems true for protective equipment and measures in the workplaces. Even though OHS needs are repeatedly belittled, observations during the interviews in footwear manufacturing enterprises and interviews with institutional experts such as TASEV [48] showed that chemical substances, sharp tools, and dangerous machinery like press machines are used and that the workshops are very noisy, hot and dusty, often even without any windows. Interviewed institutions also mentioned various risks and workplace conditions incompliant with OHS and Labour Law. The representative from Deri, Tekstil ve Kundura İşçileri Derneği underlined that “There is not even a medicine cabinet in the workplaces.”

Unfair Prices and Competition

When asked about their biggest problems, employers raised their concerns about unfair competition due to cheap production of competitors paying low wages, enabling very low selling prices. Some employers commented that “Syrian manufacturers work only with Syrians and cut prices (price per piece). Following, main manufacturers started to prefer them and to [be able to] receive orders, we had to cut down the prices as well” which means less profit and lower wages. Moreover, like many other sectors, leather goods production relies on the USD/TRY exchange rate, and so due to the inflation rate in Turkey the cost of materials, supplies, machinery repair and maintenance have been increasing dramatically (see also Box 3). Duplicating these running costs such as rent, electricity, water and other infrastructural costs, owners of MSMEs’ resort to cutting down labour costs. Enterprises that employ informally also cannot benefit from financial incentives provided by the state and by the private sector. One employer explained that “There is no cash return. There is no check anymore, business is carried out only by short-dated bill. We have difficulties in purchasing materials. Since the raw material

[48] TASEV, Turkey Footwear Sector Research Development and Education Foundation, has around 100 members. It was established in 1997 in cooperation with the Turkish Shoe Manufacturers Association, the Shoe Sub-Industries Association, the Turkish Shoe Manufacturers Federation, and around hundred leading companies of the sector. TASEV Footwear and Leathercraft Vocational and Technical High School in İstanbul, TASEV Academia and Laboratories are the education institutions founded by the foundation.

generally comes from abroad, everything is in USD. We are almost in a position to produce at the price we sell, which makes it also very difficult to buy materials.” Employers reported their urgent needs as cash support, inspections or control over pricing of products in the whole supply chain, and digital infrastructure for online sales to access global markets.

Stand in Employers' Shoe – last man standing

A footwear manufacturer from İstanbul, Gedikpaşa neighbourhood, whom has been working for the last 10 years and has three Turkish workers, explains his situation:

My three sons have finished school and they are working elsewhere. We [shoemakers] trained them here, when business got slower, they moved to another sector, now they work in another company. Even our own children are in other sectors. Because there is no permanent job, work does not continue all the time. There is insurance payment [social security premium to be paid by the employer on behalf of the employee in case of registration with social security], of course we have difficulties as it becomes an expense. So, you see, we started to sell the sector slowly. If someone buys it [our enterprise]? We stand watching the machines. That machine [shoe sewing] was worth a flat. Even a junk dealer would not take it [today]. There were 20 machines here. Now most of them are not working. There is no work. [Formerly] I used to buy four loaves of bread when I sewed one shoe. Now it is barely enough for a quarter of a loaf of bread. Prices of everything, the material raised. All in dollars. But we cannot mark up the selling price. Turkish workers should be paid at least 600-700 TRY per week. We are already doing a work of 1.200 TRY per week. When we give half to him [Turkish worker], we [master and business owner] share the other half. Having a foreigner [the worker] is cheaper. We cannot find local workers in Gedikpaşa. One week there is one, the next week another comes. There is no continuity. He is returning to his hometown. I wish they were permanent.

Working hours and days, resting breaks, holidays and state of workload surely depend on production targets. Since interviewed enterprises are mostly suppliers of other companies, they work according to received orders. In line with that, the employers or foremen set the deadline and all employees are given hours or days to complete the order. Accordingly, they have daily and weekly targets in line with demand, and it changes with every new order. The interview with a DERİTEKS [49] representative supports that:

[49] DERİTEKS, Union of Leather, Weaving and Textiles Workers established in 1948 and has around 5 thousand members. Apart from the İstanbul Office in Tuzla district as headquarters, there are branches in İzmir and Batman. In Batman there is also Regional Office representing Van, Diyarbakır, Şanlıurfa, Gaziantep, Kahramanmaraş and Adıyaman.

order-oriented work is the usual practice. Continuity is important in the processing of raw materials, until it is turned into the main product. Likewise, Deri, Tekstil ve Kundura İşçileri Derneği [50] described that in leather production, working without giving breaks is regular practice. For instance, working during Eid is very common in leather production as workers need income. The Association also added that TCLF sector workers eat their lunch while working due to the high number of pieces which they need to finish in a particular time. In contrast to employers interviewed for the rapid assessment, the Association stated that in the TCLF sector very few workers may use their lunch break and any kind of leave including sick leave is cut off from the wage. In shoemaking on the other side, workload depends on the deadline of the order. TEKSTİL (Union of Textile Workers) [51], similarly, described that when the order arrives, it has to be done within a certain time, and this a situation that challenges legal requirements. Therefore, work can exceed the legal limit of 45 hours a week. This rush of fulfilling the order leads to occupational diseases, work accidents, and body deformation, TEKSTİL representative added.

External Impacts on the Sector: Syrian Migration to Turkey and Covid-19 Pandemic

The representatives of different institutions which were interviewed for this study also reflect on many of the topics which were mentioned by both workers and employers, and which are at least partly addressed in the existing literature. Alike conclusions of Korkmaz (2018) and Tören (2018) as well as the Turkish Grand National Assembly (TBMM) Human Rights Commission, Refugee Rights Sub-Commission, Göç ve Uyum Raporu (Report on Migration and Cohesion) (see section Migration and Migrant Workers in Turkey), our interviews with workers (both adult and parents of child workers), employers as well as institutions indicate that informal work negatively impacts the social cohesion and harmonization between host communities and migrant/refugee populations.

[51] TEKSTİL, Union of Textile Workers was established in 1965 and has more than 12 thousand members. At national level TEKSTİL is a member of DİSK, Confederation of Progressive Trade Unions of Turkey, and at international level, member of IndustriALL European Trade Union and IndustriALL Global Union.

In the interviews, employers and representatives of the institutions underlined that there has been a significant increase in the production. Formerly, manufacturers could not find sufficient labour force. A representative of the institutions Gerede Chamber of Commerce and Industry and Turkish Leather Industrialists Association stated that since the production is listed under hazardous work, worker shortage exists and additional labour force is not supplied from vocational high schools either. Especially Syrian migrants closed the gap, said DERİTEKS. With the arrival of Syrians, many employers shared that they increased their capacity by 50%. The Syrian labour force in some regions like Gedikpaşa in İstanbul reached almost 80%. However, the value of the labour force decreased.

Interviewees, e.g. from DERİTEKS, commented that since Syrians accept to work for lower wages, employers prefer to work with them. As portrayed above in many sections of this report, the cost of raw materials, machinery or equipments, rent, electricity, water and other infrastructural costs are the expenditures an enterprise owner has to pay independent of the earning, but the employers have no control over the market prices when costs of production rise. Paying ever smaller wages to informal workers seems to be among the only expenses they have control over. Especially Syrians are employed in jobs that local workers do not like the wages of (from interview with DERSANKOOP). The DERİTEKS representative observed: “Especially after the migration wave, I did not see that the refugees were employed in qualified jobs. Most of the work permit holders receive lower wages than Turks who do the same work. They accept this because they have to work even under these conditions.” A representative of DERSANKOOP [52] located in the İstanbul İkitelli Organised Industry Site shared that there are also many foreign workers coming from Afghanistan, Turkmenistan, and African countries.

“Working is Farz (order of God), sünnet (Prophets’ devotions) for Turks.”, stated the TASEV representative, explaining that for

[52] DERSANKOOP, İstanbul Leather Products Collective Workplace Cooperative established in 1984 has 1,066 shareholders. In Trios 2023 New Generation Industry Center managed by DERSANKOOP, 353 enterprises are located.

Syrians' employment in these jobs is not a choice but born out of a need to survive. Meanwhile, Turkish workers interviewed complained that because migrants accept doing similar work for lower wages, Turkish workers' salaries had to fall making it difficult for Turkish nationals to find a job with decent payment. One worker in a shoemaking workshop said that "While this situation had a positive aspect for the employer, it had a negative aspect for the worker. Turkish citizens began to receive less wages." According to TASEV, footwear is one of the industries with the highest number of Syrian workers. Among the Syrian population living in Turkey, there are persons who know how to manufacture shoes. While this was an advantage for them, it was also an opportunity for the industry. "We work with people who know the business". However, in the view of the representative of the Gereke Chamber of Commerce and Industry and Turkish Leader Industrialists Association, not enough steps are taken to formalize the employment of Syrians.

The situation may potentially also lead to risks for the sector. As one parent shared "Turks no longer do business [run or become workers]. [...] If the Syrians leave, there will be no Turks left to do this job. Because they [Turks] forgot and left the profession." Turkish nationals are still in the sector, but as displayed in detail in other sections of this report, Turkish manufacturers are particularly at risk of leaving the sector.

Next to changes in the supply of labour, the Covid-19 pandemic had a large impact on the sector. All study participants agreed that lockdowns, curfews, measures that limit the working hours and days, in-city and intercity movements, and compliance with hygiene and protective procedures hit the sector hard. Especially until the end of 2020, the majority of the enterprises interviewed were either working with half capacity or totally closed down for a period of time, also due to closure of country borders and limited international trade routes and rapid decrease in orders. Moreover,

[51] TEKSTİL, Union of Textile Workers was established in 1965 and has more than 12 thousand members. At national level TEKSTİL is a member of DİSK, Confederation of Progressive Trade Unions of Turkey, and at international level, member of IndustriALL European Trade Union and IndustriALL Global Union.

as TASEV and Gerede Chamber of Commerce and Industry highlighted, during the times of weekend restrictions and closure of shopping malls, national sales also decreased.

In the meantime, because most MSMEs work is organized informally, the workers do not have a license and no social security records. In the sample for this study, only workers with social security employed by the belt manufacturer and in the shoemaking workshop in Hatay stated that they received short term work allowance under Covid-19. Some workers reported that they could not receive their wages. Some returned back to their hometowns because of unemployment and absence of income. Both small scale employers and workers were unable to make two ends meet during this period. One shoe manufacturer recounted: "We had a hard time economically, there were times when we could not pay our rent." While another one said: "It was very challenging for us to pay the salary of the workers, pay the electricity bill, and buy the materials. We think we saved the day, once we pay the workers' salary and the electricity bill."

As emphasised by DERİTEKS, workers were being paid 50 to 60% less and still could not search for a job elsewhere so as their insurance premiums are continued to be paid by the employer. Those who found a job had to work informally in part-time jobs. There was also a tremendous loss in job security. "Unfortunately, all the [labour] measures were designed in accordance with the employers. Expressions such as "Orders have been cut, the door is there for those who do not work" were used and the first to be laid off were women." added DERİTEKS. For workers with contracts, dismissals without compensation (Labour Law Article 22) were seen repeatedly, which has caused loss of seniority.

Statements of the parents of child workers are proof for the findings that the pandemic has also impacted the occurrence of child labour. Due to technological shortages such as not having a laptop, tablet or smart phone, internet connection, compulsory education aged children could not attend live classes. One mother explained: "My child urgently needs a tablet right now. If he works and saves his pocket money, we will buy him a tablet." As children

are at home, several parents and employers have perceived school closures as holiday (rather than as time to study) and children's working as "helping their families" temporarily, though they work in the workplaces full-time alongside their parents or adults. Therefore, the ones who were not working prior to the pandemic, integrated into the labour force, started to learn the profession and have contacted the employers and co-workers. It is unknown whether they will quit working when the school year starts in September 2021.

How Union and NGO representatives describe the sectors' problems

The TASEV representative explicated that enterprises struggle with even paying back the 3-month allowances for buying raw hides and skins and taxes while they have difficulties in receiving payments from buyers for the products they sell: "Everyone is using each other's money. For example, let's say the product was sent to Russia, the payment comes after 18 months. This [no payment received in 18 months] is not reflected to the workers, they get paid. They would not work unless they are paid." However, the wage levels need to increase, since workers barely survive.

Both DERİTEKS and TEKSTİL listed double payroll (çift defter - double booking) as another alarming problem apart from unfair wage levels. According to the Labour Law, the employer has the obligation to pay the employee's insurance (social security premium) based on the actual wage received. However, employers under-report the wages paid. In this type of "hidden" informal employment, the employer notifies the relevant authorities on employment, unlike completely unregistered employment. However, even though the worker receives more than the minimum wage, the employer declares to SSI less than the real wage by transferring a minimum amount through a bank and then paying the rest in cash. For the worker, declaring a lower premium or premium below the minimum wage despite receiving higher payment causes a much lower pension or no/insufficient indemnity payment in case of dismissal.

DERİTEKS also underlined that the issue of work permits is important for exporting companies because the ordering brands regularly have inspections. However, there are many workshops in industrial sites such as Zeytinburnu (İstanbul), AYKOSAN (İstanbul), Gaziantep and Kahramanmaraş, employing migrants without work permits. Moreover, only workers in unionised workplaces have contracts, since unions push for a registered labour force. However, that does not mean these workers are insured as well.

That may happen only with an industry wide or workplace collective bargaining agreement. [53]

DERİTEKS underlined that the chemicals used are very strong, but workers wear nothing but work smocks. Technical masks are not used, not changed, except in unionized workplaces. There are very few workplace inspections and only warnings are given, but no trainings. Accidents are perceived as the carelessness of the worker. This is one of the shortcomings of the unions, they do not keep a report. TEKSTİL stated that the most occupational accidents are not reported or recorded. Usually, they are resolved through bilateral agreements. Only in workplaces with collective agreements and unions, documenting and reporting are done, and compensation is paid. However, it is very hard to follow up on occupational accidents because there are too many workers within the collective bargaining.

Conclusion and the Way Forward

The findings of the face-to-face and remote research closely resonate with Doussard's definition of degraded work; "low-wage employment in which employers intensify the pace of work and routinely violate basic labour laws" (Doussard, 2013: 26). Doussard argues that the low level of wages is not a natural condition but rather a strategy used by manufacturers within razor-thin profit margins. Discussions on due diligence, unfair trading practices, extended producer responsibilities and more decent work and labour rights related issues have been occupying Turkish government, private sector, social partners, international and civil society organisations as well as chambers, unions, federations, alliances over a decade. [54] The ultimate target for the Textile

[53] "In Turkey, employers must give a statement of employment to the SSI for each employee before the employee starts working. Both employers and employees are required to contribute to the social security premiums. Employers must pay their portion as well as the employee's portion, which they can deduct from the employee's salary. Generally, the employment agreement is not subject to a specific legal form. The parties can enter into written or verbal agreements. However, the Turkish Labour Code states that employment contracts with terms of longer than one year must be executed in written form. However, the absence of a written contract is never interpreted against the employee in the event of conflict between the parties. Collective bargaining agreements allowed under Turkish law have the purpose of protecting the rights of those employees who are in weaker positions vis-à-vis their employers. Trade unions or employee representatives, provided they are given the authority, have the right to negotiate collective agreement terms in the name of the employees. Once the collective agreement is executed, the employer will be bound by the terms and conditions of that agreement" (Üçer and Ergin, 2015). [54] See for example MoLSS and ILO Turkey Office's KİGEP and Project on Promoting Decent Work for Syrians under Temporary Protection and Turkish citizens in Host Communities, also Civil Society European Strategy for Sustainable Textiles, Garments, Leather and Footwear, 2020; Gojowczyk et al. 2021.

and Garments Sector (which includes leather and footwear) declared in the Turkish National Employment Strategy (2014-2023) of MoLSS, is 50% reduction in unregistered employment until 2023, by intensifying inspections together with policies to prevent informality (MoLSS, 2014a, Pg. 60-63). MoLSS National Programme on Elimination of Child Labour in Turkey (2017-2023) also contains the target of eliminating heavy and hazardous work in SMEs until 2023. TCLF jobs are among the ones listed in the Regulation on Heavy and Dangerous Work in Turkey.

Yet, manufacturing conditions and the situation of the labour force specifically in leather and leather goods production is not at the top (or even in the middle) of the agenda of relevant stakeholders so far. Many projects and programmes have been implemented or are ongoing in Turkey on issues such as the formalisation of informal work (such as KİGEP [55]), promoting decent work, improving labour market integration of Syrians, non-Syrians, asylum seekers and of host communities (by ILO, MoLSS, Turkish Employment Agency, SSI, UNDP, UNWOMEN, municipalities and many more). However, problematic relationships of dependency on employers and exploitative working conditions have been deepening in the sector.

The findings also show that in the context of very high economic pressures, external impacts such as undocumented migrant labour and the Covid-19 pandemic made already vulnerable workers defenceless while leaving small scale producers little scope of action. If not already back to the wall before, the pandemic forced workers to continue accepting informal jobs and degraded work and working environments. As in-detail explained by a 2020 Report of the Deep Poverty Network in Turkey, in industries where remote work is not possible, workers tried to keep working, risking their personal and families' health during the pandemic.

[55] Implemented in cooperation with the MoLSS and ILO, and SSI, financed by the EU Regional Trust Fund (MADAD) and the United States Department of State, Bureau of Population, Refugees and Migration under the Refugee Response Programme created by the ILO Office in Turkey. With additional financing from the Development Bank of Germany and the US Department of State, Bureau of Population, Refugees and Migration, the implementation of the KİGEP Programme is continued under the name KİGEP Plus in Ankara, Aydın, Bursa, Gaziantep, Istanbul, Izmir, Kayseri, Konya, Manisa, Mersin and Şanlıurfa provinces.
https://www.ilo.org/ankara/news/WCMS_763389/lang--en/index.htm

Nevertheless, due to the decrease in production, unemployment, underemployment and irregular jobs caused unstable income which pushed workers and their families deeper in the cycle of poverty.

The Way Forward

This rapid assessment was the first step taken to disclose that the reality which the workers and small scale producers of the leather and leather products industry in Turkey experience every day is not in line with the decent work and labour standards. The undeniable impact of the Covid-19 pandemic, which shook not only developing but also developed countries in social, economic and even political contexts, revealed the necessity of evaluating our limited research sample and findings beyond the “already known”. The problematic areas and the most urgent needs expressed by the study participants were used to determine the action areas that are expected to be considered by institutions and organizations that have a role and responsibility to contribute to the solution.

Prioritising the Unprotected and Their Recovery

Informal work is an indispensable part of the Turkish economy [56] as well as the TCLF sector in Turkey. Most of the workers in the small scale production workplaces interviewed are employed informally, and both the workers and employers do not have SSI registration. Migrant workers also do not have work permits. Regularization (registration) is expensive due to excessive tax policies. This hurdle is too high for many small producers, but support for access to the market, technology, training, research and development, and even related public services, as well as employment-oriented incentive are only given to registered businesses that can meet the necessary requirements. Small businesses operating informally cannot develop and increase their competitiveness, and cannot make a profit to afford covering the costs of employing formal workers and providing decent working conditions. In Turkey, the registration, work and residence permit application processes of foreigners with various legal statuses,

[56] According to Cumhurbaşkanlığı, Strateji ve Bütçe Başkanlığı (the Presidency, Strategy and Budget Department), 2021 First Quarter Economic Developments Report, the informal employment rate was 28,9% as of March 2021.

including Syrians under temporary protection, vary according to their status. In the leather sector, micro and small scale employers often also do not have the necessary resources to apply for work permits for the migrant workers, a process which is time consuming. As a result of workers being “not on the books” and employers being unregistered, two protective mechanisms do not apply to informal workers: Firstly, enterprises are not inspected regarding violations of labour standards or OHS risks. Secondly, workers cannot invoke and benefit from the labour law and social protection system, neither in situ nor in court cases, retrospectively.

As this rapid assessment reveals, the fact that informal work and production are “normal business practices” leaves workers unprotected and vulnerable to exploitation, while giving employers not much option rather than taking advantage of this situation. For this reason, it is necessary to carefully examine the underlying causes of informality in the manufacture of leather and leather products, especially in SMEs[57]. As underlined in ILO’s 2011 report “Not all workers and economic units are in a position to be formalised in the short or medium term. For many of them, measures to enhance the level, stability and predictability of income, reduce decent work deficits and improve productivity are the first steps, followed by gradual transition to formality” (ILO, 2011: 108).[58] Therefore, field studies shall be conducted by academics, researchers, rights-based or humanitarian assistance NGOs or sectoral NGOs (such as TASEV, Deri, Tekstil ve Kundura İşçileri Derneği, TDKD, TDSD), chambers, union of chambers (such as TOBB, İTKİB, İDMİB) workers and employers unions (such as DERİTESK, TUDİS, TEKSİF, TEKSTİL), federations (such as TESK, TİSK, DİSK).

Good governance is needed including effective monitoring and evaluation, enforcement and inspection, awareness raising and

[57] Possible research questions are: Which resources would be needed by small scale producers, or which changes in the regulation would be necessary to enable the small leather sector businesses to register? How can the profit margin of small producers of the sector be substantially increased, to enable decent work, wage and income? How can the resilience and bargaining power both of the small scale employers and their employees be strengthened?

[58] Also see ILO, 2014c. Hazine ve Maliye Bakanlığı, 2019.

and information management for tackling informality and facilitating transition to formality. In addition, poverty reduction strategies and improved access to social protection mechanism targeting unprotected informal workers are key steps to be taken by the central and provincial level governmental agencies (MoLSS, İŞKUR, SSI, security forces) as well as local administrations like governorates and municipalities. OECD and ILO (2019) examined country initiatives to extend social protection to people dependent on the informal economy and displayed that (Figure 4.4)[59] the higher social protection spending, the lower informal employment. It is very crucial that financing of such extension of social protection to informal workers is uninterrupted during the recovery period after wide range shocks such as the Covid pandemic. Moreover, “measuring informality at the individual and the household level...is essential to identify the right mix of interventions and develop an integrated policy package for the extension of social protection to informal workers” (OECD and ILO, 2019: 105).

Lastly, priority must also be given for the recovery of the most vulnerable affected social groups such as informal workers whose precarity deteriorated by the socio-economic impacts of the pandemic. Governments all around the world utilized various methods of financial relief in the context of the Covid-19 pandemic. One of the key lessons was the supreme importance of having information about vulnerable individuals and households to respond quickly, register new beneficiaries and avoid double counting or dipping. Some countries, like Turkey, were already combining information from multiple administrative databases for the purpose of determining eligibility. Still, unprotected groups like informal workers in the TCLF sector and their households were not targeted. Thus, emergency risk management systems of the Ministry of Family and Social Services, MoLSS, Ministry of Treasury and Finance, Ministry of Interior, DGMM and SSI shall operate hand in hand with good routine social protection programmes throughout the cycle from intervention to recover and prevention.[60] Turkish governmental agencies in

[59] Source: ILO. (2011). World Social Protection Report 2010/11: Providing Coverage in Times of Crisis and Beyond

[60] Also see World Bank, 2020b. Şeker, Özen and Erdoğan, 2020.

collaborations with agencies (such as UNICEF, ILO, UNDP, UNWOMEN, IOM, UNHCR) might prepare a shock-responsive social protection framework [61] which is inclusive and “leave no one behind.”[62]

Collaborative Action for Sustainable Change

The right to representation of workers is very crucial. Their problems should be voiced up by them and be heard. According to the MoLSS, Communiqué on the Number of Workers and the Number of Members of Trade Unions, statistics for July 2021, in 20 sectors in which workers can become members of labour unions, determined by the Law on Trade Unions and Collective Bargaining No. 6356, there are a total of 15 million workers (mostly formally employed). 2.1 million of them are unionized; the unionization rate is 14.13%. There are 16 unions and a total of 1.3 million workers in the Weaving, Garment and Leather sector. Eight unions that represent the leather industry have 91.665 members; the unionization rate is 7.33%.[63] DİSK-AR’s April 2020 research on unionization during the pandemic states that “90% of the workers are not unionized, 92% are not covered by a collective bargaining agreement. 39% of union member workers are not covered by a collective bargaining agreement. While steps are taken to protect workers against the risks posed by Covid-19 in unionized workplaces, workers in non-unionized workplaces are at the mercy of the employer.” Women and youth are especially without representation and voice.

Thus, striving for the unionisation and collective bargaining agreements for all workers from all workplaces including MSMEs is important for the prevention of violation of workers’ rights in unregistered enterprises and informal jobs. Establishing solidarity among workers instead of rivalry, raising awareness of workers on their basic rights and freedoms, and intervening in case or risks and violation of rights in a timely manner shall be the major purposes of the unions and workers’ organisations such as DERİTEKS, DERİTESK, TUDİS, TEKSİF, TEKSTİL, Deri, Tekstil ve Kundura İşçileri Derneği, TDKD, TDSD.

[61] For example: UNICEF, 2019.

[62] With the adoption of the SDG-2030 Agenda, UN Member States pledged to ensure “no one will be left behind”, for more details: UNDP, 2018.

[63] https://www.csgb.gov.tr/media/83673/2021_temmuz.pdf

Collaborative and harmonised strategies and actions are required. A single ministry, union, chamber or employer association cannot solve sectors' human rights issues alone. Workers' and employers' unions must be acted upon in all matters. They should always be consulted by the government and public institutions such as MoLSS, Ministry of Family and Social Services, Ministry of Interior and taken as partners in the development on sectoral strategies, action plans or intervention programmes related to decent work, child and migrant labour, equal opportunities and inclusive business practices. Simultaneously, unions and chambers shall put pressure on or regularly provide information to government and its agencies at central and local level for taking action to realise labour standards in all workplaces. The Union of Chambers and Commodity Exchanges of Turkey (TOBB) [64] may be the leading actor to bring incompliance with labour standards and OHS risks in the leather industry to the sector assemblies to be discussed, to update sectoral reports with valid data collection efforts. Results based consultation events should be organised for exchange of ideas with active participation of NGOs, employers, unions, exporters, brands and buyers.

The Turkish Medical Association (TTB) Occupational Health and Medicine (ISIH) branch's main objectives are to identify the health problems of the employees arising from the working environment and to develop recommendations for the protective measures, to protect rights of occupational health physician and improving their working conditions, to contribute to the development of policies related to occupational health, to organize post-graduate trainings and scientific events to improve the professional competence of occupational physicians. Physicians with the Occupational Health Certificate must obtain the Certificate of Authorization from TTB in order to start working. Therefore, TTB and MoLSS General Directorate of Occupational Health and Safety (İSGGM) may implement joint projects for reporting of occupational diseases and accidents happening in the informal leather and leather products manufacturing workplaces and for including these data in Occupational Health and Safety Registry,

[64] The Union of Chambers and Commodity Exchanges of Turkey (TOBB) is the highest legal entity in Turkey representing the private sector and has 365 members in the form of local chambers of commerce, industry, commerce and industry, maritime commerce and commodity exchanges.

Tracking and Monitoring Program (İSG-KATİP). Closing this data gap will help to raise awareness for the OHS concerns and to inform interventions in light of workers' needs.

Systems should be established and sustained giving workers the opportunity to give feedback and express grievances without having to distress retaliatory measures by their employers. However, our findings reveal that for those systems to be effective, workers need to be trained and sensitized on their rights for instance with respect to OHS standards, overtime, breaks, and working hours and days. Individually or collectively, documenting violation of accidents or even risks would also contribute to the evidence-based advocacy efforts that push responsible actors to take action. Large producers in Turkey, when subcontracting to micro and small enterprises, need to assist in formalizing work relationships and securing safe working environments, e.g. with long-term contracts and with knowledge and infrastructure (such as on grievance mechanism with the use of technology such as smart phone applications, hotlines, mediation). This can only be achieved with trusting relationships and fair prices. Given that many pressures in the market derive from international competition and the demands of consumer brands, Turkish market actors and their associations should search for ways to express their concerns collectively to those actors. Change is only possible if it is recognized in many production areas worldwide, including Turkey, that the race to the bottom cannot be won. As some producers globally have started to reflect on their position in light of the Covid-19 pandemic (see e.g. Anner 2020) and producer associations start to cooperate across national borders (such as the STAR Network, Sustainable Textile of the Asian Region), industry organizations from Turkey should also make claims for their most vulnerable members in the supply chains.

With the rapid assessment, we have shown severe shortcomings in small scale production in Turkey. It is not acceptable that international market actors and consumers might profit from the vulnerability and exploitation of people struggling for survival, thereby reinforcing already existing hardships and injustice. The findings strongly underline that brands and retailers must implement human rights due diligence throughout their entire

value chains, hence going beyond the first tier . Problems as the ones identified can only become visible if consumer brands follow the UNGP in that regard. The respective steps required are: Identification and assessment of human rights risks; responding to those risks; reviewing the effectiveness of the measures taken; accounting/reporting. This implies to review business models, purchasing practices and price expectations critically.

Such as the larger producers in Turkey, brands should strive for long-term commercial relationships with tanneries and other suppliers. They should foster and engage in meaningful social dialogue in their value chains, and they should collaborate with their business partners to implement robust grievance redressal mechanisms (based on the OECD guidelines) to create safe channels for such communication for workers. The findings clearly show that problems in the supply chains interact with contextual specifics. If in the value chains and nationally no systems are in place to protect the workers, those in financially and legally deprived living situations will be prone to be exploited. However, especially brands from Europe should also understand the findings as a signal that moving production closer to the consumer market is not a sufficient strategy to address labour rights concerns. For due diligence regulation in the making such as within the European Union, the study is yet another proof for the necessity to include the entire supply chain.

Tailored Interventions for Women and Children

The rapid assessment showed that gender and age affect the assigned task in the leather sector. Women and children are seen fit for other tasks compared to male workers. Therefore, their work experience is dissimilar to male co-workers while at the same time, the unique needs of women and children who are integrated into an adult male-dominated workforce are seemingly ignored. Such atypical employment of women as well-assessed in KEİG Platforms' 2015 report is the product of segregation and stratification of the labour force on the basis of gender. For instance, footwear manufacturing workshops located around Shoemakers Bazaar near Clock Tower in Adana are almost all male places. Thus, STL staff could not find any female worker to

conduct an interview. In other locations such as Gedikpaşa neighbourhood or Leather Industry Site of Bayrampaşa in İstanbul, where interviews with workers, employers and parents were conducted, the situation was not so different: few women were among male co-workers. KEİG's stress on "...atypical employment has become especially evident for certain labour force groups and these groups of workers are squeezed into market layers where bad working conditions prevail. It is observed that women and especially certain women groups (migrant women, women with low education, women working in service sectors) are predominantly included in these groups" becomes very relevant.

While the report could not address those issues in depth, it underlined that a gender-sensitive approach would be useful. The "obligation to work", which is often mentioned in the interviews, means giving up education for children, whereas women's shifts continue at home with the burden of unpaid care. Like the interviewed female worker who stitches shoes at her home, many women earn a living in footwear manufacturing by working from home while taking care of children, domestic chores and so without work and private life separation or balance. Even though these women and children participate in working life, they are still not involved in family decisions. Mostly, they are not able to spend the money they earn for themselves, and their opinion on how the money will be spent, is not taken. In short, dependency relationship at work (to employer and even co-workers) and at home is the only reality for these women and children.

This rapid assessment as a very first effort of discussing informal working conditions in the leather production sector and its impacts on individuals and sector. Though variety in nationality, age and gender of the study participants provides insights regarding differences in problems workers experience, this research was not guided by a feminist research question and did not focus on gender inequality. Further field research should be conducted to document the extent of intersectional human rights violations or discrimination in the leather products manufacturing and their physical, mental, cognitive and societal impacts on women. Apart from few studies conducted with regards to working experiences of female textile and/or garment industry workers

(Uluğ, 2000: Kumaş and Fidan, 2005: Suğur, 2005: Kocacık and Ayan, 2011: Yavuzçehre, 2014: Budak and Demir, 2017: Erol et. al., 2017: Kaya, 2018: Çakır et. al., 2020), no research efforts exist for leather products such as footwear, shoe apparel, belt, or bag production in Turkey. Also, as pointed out by the Migration Studies Association (GAR) “Despite the abundance of studies on Syrian refugees, there are few studies that focus on women or address the issue with a gender approach [...] the work experience of women employed in paid jobs from a gender perspective is needed.” (2020: 6) Such situation analysis and/or systematic disaggregated data collection effort that can be done by women’s rights and/or human rights organisations, workers unions and chambers would empower evidence-based advocacy efforts, planning and gender mainstreaming in business principles. In Turkey, few feminist and women’s rights NGOs are interested in informal female work, female workers’ rights and working conditions. They do not include these issues in their human rights monitoring, advocacy or awareness raising mission. However, this rapid assessment may also be used even by grass root organisations and women’s rights defenders as a starting point.

Moreover, an overview of laws, policies and practices and situation analysis research is needed on gender-based violence and harassment in TCLF and especially in leather products manufacturing workplaces and supply chains in Turkey. Again, women led organisations and feminist researchers might conduct these empirical studies that should provide roadmaps for the development of tailored policies and initiatives for governmental agencies, international organisations like UN agencies and international development agencies operating in Turkey or foreign diplomatic missions (embassies) in Turkey.

Lastly, the findings indicate that the creation of more quality jobs and enhancing livelihood opportunities for adults and keeping children in the school system are vital for abolishing the households’ need for children’s labour. In different provinces of Turkey, for different leather products to be manufactured, producers have different working practices and labour force profiles. Thus, one remedy for all workplaces, or one fixed predetermined action would not be sufficient and SMART

(specific, measurable, achievable, realistic or relevant and time-bound) objective for the elimination of child labour in this heavy and hazardous industry. Nevertheless, it is quite essential for all stakeholders to have a child protection approach[65] and to follow child safeguarding principles[66] combined with updated, valid, traceable data collected from the field. Provincial Child Labour Prevention Units of MoLSS and İŞKUR are therefore the key agencies which should be also supported by local NGOs, academics as well as unions and chambers of industry and commerce. Meanwhile, Ministry of National Education's interventions and long-term strategy for vocational and technical training in leather products manufacturing shall continue and might be supported if needed by private companies, NGOs and chambers.

While children should mainly attend school and enjoy their childhood, adult workers and micro and small producers in the supply chains should in fact be valued at least as much as the material they work with. We have given some suggestions about how this can be achieved. Against this background, we certainly hope for more comprehensive research providing more and in-dept suggestions and more engagement of all actors who have roles and responsibilities on how to create a leather industry in which being a leather industry worker and a small producer in Turkey is valued appropriately.

[65] For example:

https://www.ilo.org/ipecc/Campaignandadvocacy/wdacl/2014/WCMS_245210/lang--en/index.htm

[66] For examples:

https://resourcecentre.savethechildren.net/node/8562/pdf/kcs_standards_10.14.pdf

<https://resourcecentre.savethechildren.net/node/15852/pdf/eng-child-safeguarding-for-cva-guidance-final.pdf>

https://resourcecentre.savethechildren.net/node/15679/pdf/tryggare-tillsammans-child-safeguarding-policy_inkl_bilagor_-eng.pdf

Also Support to Life Association "What does child safeguarding mean?"

<https://www.youtube.com/watch?v=6ECI11gik3Y>

Annex

The complete list of referenced Literature can be accessed via the link below.

https://www.suedwind-institut.de/files/Suedwind/Publikationen/2021/2021-21%20Valuable%20as%20leather_Literature.pdf



Annex

- Annex 1 - Actor Map of Leather and Leather Producers in Turkey
- Annex 2 - Institutional Interviews Conducted
- Annex 3 - Questions for Semi-structured Interviews

https://www.suedwind-institut.de/files/Suedwind/Publikationen/2021/2021-21%20Valuable%20as%20leather_Annex.pdf

