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COUNTRY TURKEY

Population (2022)



Number of registered garment companies 2020



Garments and shoes as share of total exports 2019



Number of registered employees in the garment sector 2020

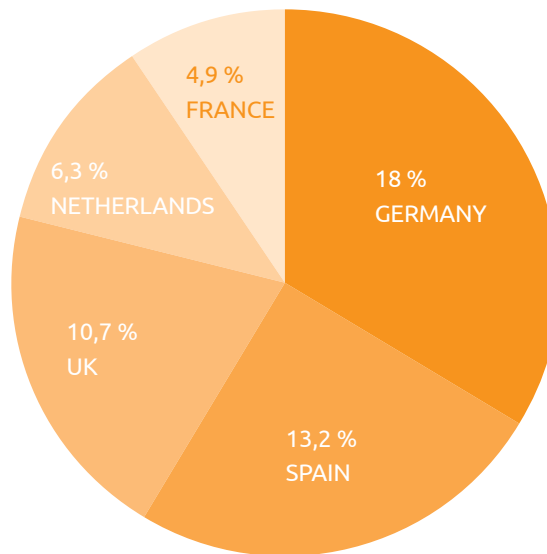


Number of registered and unregistered workers in the garment sector 2020



TOP FIVE COUNTRIES TO WHICH THE TURKISH GARMENT SECTOR EXPORTS THE MOST

Share in garment exports 2019 in %⁵



¹ <https://www.ihkib.org.tr/fp-icerik/ia/d/2020/12/08/hedef-325-reklamsiz-202012081131100657-E247B.pdf> p.68

² <https://www.ihkib.org.tr/fp-icerik/ia/d/2020/12/08/hedef-325-reklamsiz-202012081131100657-E247B.pdf> p.68

³ Estimation CCC Turkey

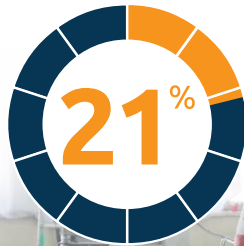
⁴ <https://www.ihkib.org.tr/fp-icerik/ia/d/2020/03/12/turkiye-genel-hazirgiyim-tekstil-ihracat-ithalat-2019-yillik-202003121749220390-07701.pdf> p.2 - last accessed 12.21.2020

⁵ <https://www.ihkib.org.tr/fp-icerik/ia/d/2020/03/12/turkiye-nin-en-fazla-ihracat-yaptigi-ulkeler-2019-yillik-202003121749220407-B8271.pdf> p.2 - last accessed 12.24.2020

WAGE LADDER TURKEY

TRY 2,826 € ⁶ 197	Statutory minimum net wage 2021
TRY 2,825 € ⁶ 197	Lowest net wage of interviewed workers incl overtime / allowances November/December 2021
TRY 3,396 € ⁶ 237	Average net wage of interviewed workers incl. overtime / allowances November/December 2021
TRY 5,000 € ⁶ 349	Highest net wage of interviewed workers incl. overtime / allowances November/December 2021
TRY 5,011 € ⁶ 350	Estimated poverty threshold for December 2021 (two adults and two children) on the basis of EuroStat EU-SILC data for previous years ⁷
TRY 13,073 € ⁶ 913	Trade union confederation Türk-İş calculation for basic costs of living for a family of four Dec 2021 ⁸
TRY 13,600 € ⁶ 924	Updated Europe Floor Wage benchmark – Base Living Wage Estimate Jan 2022

SHARE OF STATUTORY
MINIMUM WAGE IN BASE
LIVING WAGE ESTIMATE:



SHARE OF AVERAGE NET WAGE
OF INTERVIEWED WORKERS
IN LIVING WAGE ESTIMATE:



⁶ InforEuro exchange rate for December 2021. As the inflation was particularly high in December and most data originates from December 2021, we use the exchange rate for December to enable comparability of data.

⁷ http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ilc_li01&lang=en – accessed 21st March 2022 – The latest EU-SILC poverty thresholds are for 2020

⁸ <https://www.turkis.org.tr/aralik-2021-aclik-ve-yoksulluk-siniri/>

MAIN WORKERS' RIGHTS VIOLATIONS

- ▶ All interviewed workers' December wage was below the EuroStat poverty threshold
- ▶ Freedom of association violations
- ▶ Violation of right to social security
- ▶ Inadequate occupational health and safety practices
- ▶ Exploitation of child labour
- ▶ Exploitation of immigrant labour
- ▶ Illegal amount of overtime
- ▶ Increasing fear of workers losing their job

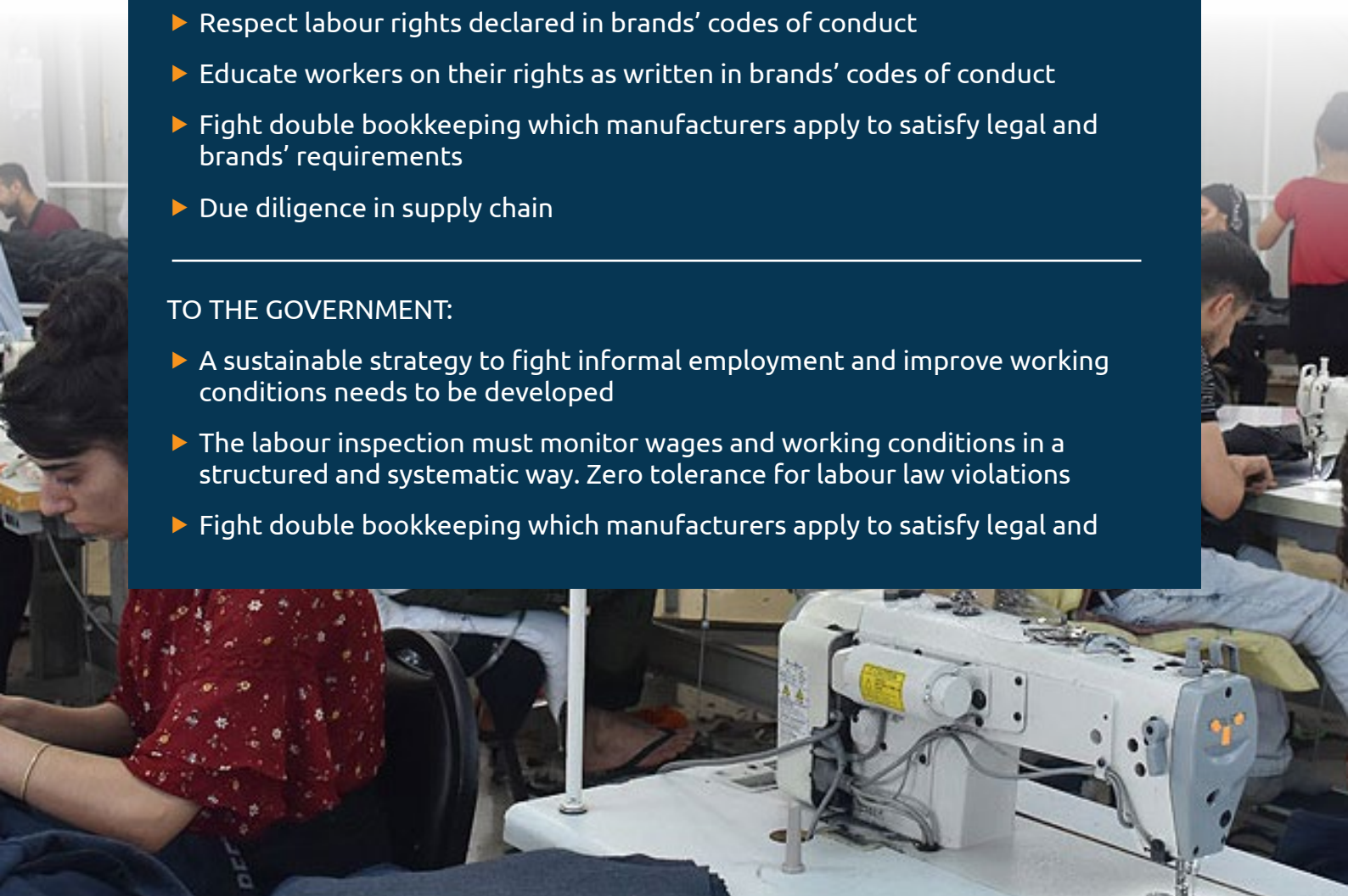
RECOMMENDATIONS

TO BRANDS:

- ▶ Respect labour rights declared in brands' codes of conduct
- ▶ Educate workers on their rights as written in brands' codes of conduct
- ▶ Fight double bookkeeping which manufacturers apply to satisfy legal and brands' requirements
- ▶ Due diligence in supply chain

TO THE GOVERNMENT:

- ▶ A sustainable strategy to fight informal employment and improve working conditions needs to be developed
- ▶ The labour inspection must monitor wages and working conditions in a structured and systematic way. Zero tolerance for labour law violations
- ▶ Fight double bookkeeping which manufacturers apply to satisfy legal and



THE TURKISH GARMENT AND SHOE INDUSTRY AND ITS WORKFORCE – A QUICK OVERVIEW

The textile, garment, leather and footwear (TCLF) sector is an important sector for the Turkish economy and society. Today, there are two huge parts of the sector: on the one hand, no-name production for the internal market and other countries in the region like, for instance, Russia. On the other hand, there is production for global brands, including those headquartered in Turkey, such as LC Waikiki. Since the 80s, the sectoral industrial strategy aimed to make Turkey one of the most important garment and shoe exporters in the world. The government supported this process through incentives for companies and through neglecting labour rights. The government, which allocates large budgets for trade convenience and production continuity, also prepares action plans to shape the structure of the sector. **61.2% of all registered garment companies are located in Istanbul and 7.8% in Izmir**⁹ – other cities follow suit with lower shares. As opposed to the garment production in Istanbul, the “Aegean Free Zone” in Izmir is a region where production is organised in bigger factories. It benefits from trade facilities offered by the government. In this region, employers’ control over the workforce is relatively high.

The share of **women** in the garment industry is estimated to be 60-65 percent. They face lower pay, sexual harassment, sexual abuse, physical and psychological violence in textile and garment workshops and discriminatory practices such as assigning low-income jobs or hierarchically lower positions only to women (e.g. ironing, quality control, overlocking) or piecework for women. In contrast men’s jobs are paid on an hourly basis. The piece-rate system is very stressful. Women workers are more often threatened with lay-off and due to the very low wages, they are forced to have an insufficient/unbalanced diet.¹⁰ An ILO / TurkStat report¹¹ on the gender pay gap in Turkey and the impact of the Corona-crisis states: “women whose domestic and family care burdens have increased due to the epidemic may have to switch to short-term precarious forms of work or even quit their jobs in order to spend more time at home, let alone struggling for managerial positions”. Young adult women workers reported that their payments did not cover their work done, that the employers demand back some of the paid wages in cash and that the payments were made late.¹²

Workers working in Istanbul garment workshops mostly consist of workers of Turkish and Kurdish origin. Kurdish workers, who immigrated to Istanbul in the 90s, express that they were discriminated against based on their ethnic identities in terms of getting a job and renting a house in the early days.¹³ With the influx of Syrian and then also **refugees** from Iraq, Afghanistan, Pakistan, Azerbaijan, Georgia and Somalia, many of them started to work in the TCFL sector. Child labour started to be openly seen in Turkey. While in the past employers had already tried to reduce labour costs by employing children, they were hidden. Particularly in the garment and shoe industries, refugees or migrant workers and their children are now seen by employers as cheap labour reserves. Refugee children, who work in worse conditions than any other workers, are exposed to discrimination such as working longer for lower wages, late and incomplete wage payments, ill-treatment, and being forced to work under hate speech.

With the “Textile, Ready-to-Wear and Leather Sector Strategic Action Plan”¹⁴(2008), the government intends to shift bigger parts of the sector to Eastern and South-eastern Anatolia regions. This policy causes cuts in wages, labour, and social rights. By destroying the tradition of unionising that textile workers accumulated in Turkey’s West, this policy also creates an unorganised workforce.¹⁵

72% of Turkish garment manufacturing firms are of micro (less than 10 employees) or small (less than 50 workers) size. With this size, companies are under the radar of the labour inspection according to the law.

During the previous years, CCC Turkey has observed a slight increase in the number of registered employees in the garment industry but a growing number of unregistered, informal workers. Many immigrants (e.g. Afghanistan, Somalia, Uzbekistan, Tajikistan) and refugees are seeking jobs in the TCLF sector.

⁹ https://ekonomi.isbank.com.tr/ContentManagement/Documents/sr201705_hazirgiyim.pdf p.7 - last accessed 28.12.2020

¹⁰ https://www.ilo.org/wcmsp5/groups/public/---europe/---ro-geneva/---ilo-ankara/documents/publication/wcms_756659.pdf - last accessed 12.28.2020

¹¹ https://www.ilo.org/ankara/publications/WCMS_756659/lang--tr/index.htm - last accessed 12.28.2020

¹² https://www.researchgate.net/publication/339135719_Tekstil_ve_Hazir_Giyim_Atolyelerinde_Calisan_Genc_Yetiskin_Kadin_Iscilerin_Calisma_Kosullari_ve_Deneyimledikleri_Cok_Boyutlu_Sorunlar p.110 - last accessed 12.28.2020

¹³ <http://www.isguc.org/?p=article&id=631&cilt=18&sayi=3&yil=2016> - last accessed 28.12.2020

¹⁴ <https://docplayer.biz.tr/8850171-Tekstil-hazir-giyim-deri-ve-deri-urunleri-sektorlerine-yonelik-stratejik-eylem-plani.html>

¹⁵ <https://www.evrensel.net/haber/421299/tekstilde-cinlilestirme-basladi-tesvik-sona-erince-kayit-disilik-artacak> - last accessed 12.27.2020

INFORMALITY: WHERE FOLLOWING THE LAW IS THE EXCEPTION RATHER THAN THE RULE

Due to the absence of effective implementation of the labour law in the TCLF sector, many workers are informally employed. There is a **continuum between formal and informal work**. One can find informal labourers with no job security and without regular or partly regular payment next to a formally employed worker in any workplace. During our field research, every fourth interviewee reported not receiving any paper on their wage payment. Every fourth worker who earned more than the minimum wage receives part of the salary in cash, “in the envelope”.

“The workplace environment is generally bad, but when there is an inspection, the employer knows before and fixes almost everything. When I told Zara’s auditor that I am receiving my salary in cash, and my salary was shown as minimum wage in the official records, the auditor replied ‘You can ask your employer to be paid by bank transfer’. We do not wear masks at work, but they make everyone wear it when there is an inspection. There are many people who have been infected with COVID-19.” (worker in a tier 2 factory).

Particularly in Istanbul, production becomes complex and multi-layered, as the workshops and small-scale factories in certain neighbourhoods in the city are scattered and unorganised. The feature of these locations is that they are neighbourhoods where workers both live and work. Estimations of the extent of informal work in the garment industry vary. They range from 30% to 50% share of informal employment in the total garment industry workforce. While effective surveillance of wage and social security payments would benefit workers, fighting informality also means cutting off access to livelihoods for many Syrians.

Policies aimed at reducing the economic repercussions of the COVID-19 pandemic seem to ignore informal wage earners. Informal wage earners are the first group to be affected by reducing orders. Therefore, they are likely to be laid off due to the pandemic. Moreover, in terms of low wages, it can be assumed that their savings are relatively low and they need more work. On the other hand, they are completely outside the protective umbrella of economic policies.¹⁶

One main reason informal work is very widespread in the garment industry is the absence of sufficient and qualified state labour inspection. CCC Turkey particularly criticises that inspectors are not trained on the chemicals used and the causes of exposure to other occupational diseases.



HOME-BASED WORK

Since the flexibilisation of garment production in the 70s, it overflowed from factories into households. Many home-based women workers state that they previously worked in factories. Due to household and care work needs, they searched for home-based work despite low job security, low pay, the uncertainty of working time, health problems and no chance of being covered by collective agreements. Often children work along with their mothers. Neighbours help women home-based workers if they have to fulfil orders. During the pandemic the number of home-based workers increased by an estimated 30 - 40%.¹⁷

DAY LABOURERS

Another recently increasing phenomenon in the labour market occurred in accordance with short-term orders by brands: daily unregistered workers in the textile sector. These day labourers either find daily work through subcontractors or via Facebook or wait at the informal waiting points at central locations in the neighbourhoods close to the workshops and find daily work through subcontracted agencies who are picking themselves up from these points in the morning in line with the needs of the employers.

¹⁶ https://www.tesev.org.tr/wp-content/uploads/TESEV_Degerlendirme_Notlari_Kayit_Disi_Istihdam_Kovid_19.pdf p.3- last accessed 12.28.2020

¹⁷ <https://www.tv5.com.tr/haber/1900/evde-uretim-yapan-tekstil-iscileri-devletten-destek-istiyorlar.html> - last accessed 12.29.2020

ALMOST ALL FASHION BRANDS AND RETAILERS SOURCE FROM TURKEY. HERE IS A SMALL SELECTION: ADIDAS, BANANA REPUBLIC, BENETTON, BOOHOO, C&A, ESPRIT, GAP, G-STAR, HUGO BOSS, H&M, INDITEX – ZARA, LEVI'S, MARKS & SPENCER, NEXT, NIKE, PUMA, PRIMARK, URBAN OUTFITTERS, UNIQLO, VF.¹⁸

WAGES, HYPERINFLATION AND POVERTY OF GARMENT WORKERS

	NET MINIMUM WAGE (TRY)	INCREASE IN NET MINIMUM WAGE (%)	TURKSTAT INFLATION RATE DEC ¹⁹	INFLATION RESEARCH GROUP (ENAG) ²⁰
2017	1.404	%8	%12	
2018	1.603	%14	%20	
2019	2.021	%26	%12	
2020	2.325	%15	%15	
2021	2.826	%22	%36	%83
2022	4.253	%51		

Discussions in media²¹ as well as experiences from field research shows that

A

the current hyperinflation could hardly be compensated by the increases in minimum wages. The real minimum wage, i.e. the purchasing power of minimum wages, has in fact decreased.

B

On top, the official inflation figures do not reflect the reality of workers. Workers report that for them, the price development is much more dramatic than reflected in TurkStat inflation rates. Therefore, an independent Inflation Research Group (ENAG) emerged.

¹⁸ See <https://openapparel.org/?countries=TR>

¹⁹ https://www3.tcmb.gov.tr/enflasyoncalc/enflasyon_hesaplayici.html

²⁰ <https://enagrup.org/bulten/2021ea.pdf>

²¹ <https://www.reuters.com/article/idUSKBN2771EY>

The trade union confederation DISK analysed how many workers depended on the minimum wage in Turkey during the Corona-crisis. A report states that 22% of all wage earners received less than the minimum wage and 69% earned around minimum wage in 2021²². While the minimum wage for 2022 was set at 4,253 TRY, DISK's demanded a minimum wage of 5,200 TRY.

DISK²³ analyses that the national minimum wage setting process is unbalanced. Unions, for instance, cannot strike during this process of wage bargaining. Moreover, workers' families are not taken into account. Particularly the discrepancy between the minimum wage and the real living expenses of workers is criticised by DISK's report. The gap between the minimum wage and basic costs of living calculated for 2020 is almost 1 to 4. This gap for 2021, calculated by Türk-İş, increased from 1 to 5 (see wage ladder).

Consequently, the Deep Poverty in the Pandemic Period and Access to Rights Research Report²⁴ states that an increasing part of the population does not have access to basic housing (not able to afford rent, tap water, electricity, clean drinking water, heating), does not have access to a basic diet (skip meals, collect food from garbage, starve) and to basic sanitary appliances, medicine and protective equipment, to education and social life.

THE MINIMUM WAGE INCREASES HAVE NOT COMPENSATED FOR INFLATION AND FOR HIKES IN COSTS OF LIVING. IN ADDITION, THE MINIMUM WAGE FAILS TO SECURE A BASIC STANDARD OF LIVING.

A LIVING WAGE ESTIMATE FOR TURKEY

The European Floor Wage²⁵ benchmark for 2018 for Turkey was 5,095 TRY / 956 EUR / 2,640 PPP USD. CCC Turkey updates this figure based on the increased minimum wage rates. Field research for a full new calculation of a living wage for Turkey would need a workers' food basket survey, which was not feasible under COVID-restrictions. At the same time, an inflation adjustment using TurkStat inflation rates seems inappropriate as these rates are broadly conceived by workers and the public as unrealistically low. After intensive consultation with experts and CCC colleagues, CCC Turkey decided to use the statutory minimum wage growth rates for adjustment. These increased rates proved to be much more realistic than the inflation rates.

LIVING WAGE		TRY	EUR ²⁶	PPP USD ²⁷
2018		5,095	956	2,640
Jan 2019	5,095 × 126%	6,420	979	2,843
Jan 2020	6,420 × 115%	7.383	954	2,838
Jan 2021	7,383 × 122%	9,007	869	
Jan 2022	9,007 × 151%	13,600	879**	

** Decrease in the amount of living wage is due to decrease in the exchange rate stemming from national economic crisis in Turkey.

RESULTS OF FIELD RESEARCH: POVERTY, DEBT TRAP AND EXCESSIVE OVERTIME

29% of interviewed workers earn just the minimum wage – despite overtime and premiums or allowances. Only 3% received the highest recorded wages: 5,000 TRY. As an estimated EU-SILC poverty threshold for 2021 is 5,010 TRY, **this means that all workers received less than the poverty threshold in December 2021, not to mention a living wage.**

22% of those who earn a salary higher than the minimum wage said they received the minimum wage part of their salary by bank transfer and the rest in cash by hand.

²² <http://arastirma.disk.org.tr/wp-content/uploads/2021/12/DiSK-AR-2022-Asgari-Ucret-Rapor-Aralik-2021-FINAL.pdf>

²³ <http://arastirma.disk.org.tr/wp-content/uploads/2020/12/2021-asgari-%C3%BCcret-son.pdf>

²⁴ <https://derinyoksullukagi.org/raporlar/pandemi-doneminde-derin-yoksulluk-ve-haklara-erisim-arastirmasi-yerel-yonetimlere-kriz-donemi-sosyal-destek-programlari-icin-oneriler/>

²⁵ <https://cleanclothes.org/campaigns/europe-floor-wage>

²⁶ InforEuro exchange rates for July of respective year and 21st March 2022 – accessed 21st March 2022

²⁷ <https://data.worldbank.org/indicator/PA.NUS.PRVT.PP?end=2020&locations=TR&start=2018> – accessed 21st March 2022 – The latest conversion rates is for 2020.

WORKERS QUOTES



"I have difficulties in living, I have debts. If there is no overtime, I am in minus. When children start school, I work more overtime to make a living."

"Our house is rented, I have difficulty in paying the school expenses of my children. I had to take a loan."

"High shares of the salaries of 44 of the 85 workers working at the factory were foreclosed to service their debts."

A 17-year-old worker from a small workshop producing for a global brand said, "This workshop is owned by my brother. Sometimes we stay in the workshop until 1 AM to finish the work. I work without insurance because I have to. I have been working in textile since I was 12 years old."

"I am from Turkmenistan, my family lives in Turkmenistan, I work here and send money home. I work informally."

"My monthly average wage reaches 5,000 TL with overtime work. When I need money, I work till morning in the workshop or find a job as day labourer in other workshops. There are three people working in our family, but we still have loans."

"My siblings go to school and cannot meet their needs. I was supporting them, but I can't any longer. I had already left school and started working in textiles to enable education for my younger siblings. Our economic situation is getting worse day by day."

"The salary does not cover our monthly expenses. To support the household, the children work in garment workshops on weekends and school holidays."

"I leave my kids at my mother-in-law's in the morning. I pick them up every evening. I will never make my children work in textiles."

"He (the employer) makes the 15-year-old worker work longer than permitted hours. After the 'official' hours the child worker leaves – but re-enters the workshop. He pays the salary on Saturday. Actually, you don't have to go to work on Saturday, but he forces you to go to work, and if you don't, he doesn't pay you. Their food is also very bad, always pasta or bulgur."

"When you look at the expensiveness in the country, our salary is nothing. Although two people in our household are working, it is difficult to make it through the month. The children are going to school, we are 6 people in the household."

"I had to take a loan. My wife also works, two people work in our household, but we still can't get along. My oldest son takes care of his brothers."

"Because I have debt, my child quit his education and started working."

HOW DO GARMENT WORKERS TRY TO COPE WITH POVERTY AND RAPIDLY DEVALUATING WAGES:

1

TAKE LOANS

2

WORK OVERTIME

3

HOLD MULTIPLE JOBS

THE SITUATION OF UNIONISATION IN THE TURKISH TCLF SECTOR

As of January 2020, 14 trade unions operate in the sector²⁸ – four of them affiliated with three confederations. There are two employers' associations. In 2019, 50 collective bargaining agreements were signed in the TCLF sector. These collective bargaining agreements cover 204 workplaces and 41,531 workers.²⁹ One major barrier to organising and collective bargaining is the high thresholds: a union must organise more than 1% of the workforce in the whole sector and the majority in the company. Moreover, even at a time when dismissal was prohibited during the pandemic, thousands of workers who were engaged in union organising activities were dismissed under Code-29, depriving them of their right to compensation, on the grounds that "the worker behaved contrary to moral codes and goodwill".

METHODOLOGY

This country profile is based on desk and field research carried out in 2021. Interviews were carried out according to a universally applied CCC methodology. For the field research, 138 workers (52 female and 86 male) were interviewed off-site in Istanbul and Izmir – the two main garment production centres in Turkey. Wage data collected are valid for November and December 2021. According to their published supplier lists, factories where interviewees work comprise tier 1 and tier 2 suppliers of global brands. Although we tried to equalise the participation of men and women in the interviews, efforts were not successful due to the inequality in the domestic work division. Many female workers answered our interview requests: "I urgently need to go home and cook and take care of the chores at home." In general, it was hard to find interviewees due to pandemic restrictions and the reluctance of people to speak with strangers.

²⁸ https://www.csgb.gov.tr/media/63359/calisma_hayati_2019.pdf p.27 - last accessed 12.27.2020

²⁹ https://www.csgb.gov.tr/media/63359/calisma_hayati_2019.pdf p.19 - last accessed 12.27.2020

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LAYOUT AND INFOGRAPHICS

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Quotes used in this document were not sourced from the individuals shown in the photographs. Moreover, these individuals are in no way affiliated with the people we interviewed as part of our research.

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