

KRISHNA B. KUMAR, SHELLY CULBERTSON, LOUAY CONSTANT, SHANTHI NATARAJ,
FATIH UNLU, KATHRYN E. BOUSKILL, JOY S. MOINI, KATHERINE COSTELLO,
GURSEL RAFIG OGLU ALIYEV, FADIA AFASHE

Opportunities for All

Mutually Beneficial Opportunities for Syrians and Host Countries in Middle Eastern Labor Markets

The Syrian Civil War has displaced 60 percent of its 23 million population, with 6.5 million Syrians displaced inside Syria, 5.6 million Syrians living in neighboring Middle East countries as refugees, about a million in Europe, and some 100,000 elsewhere in the world, primarily in North America. No other country in recent history has had such a large percentage of its population displaced.¹

Neighboring countries in the Middle East have felt the largest impact. Turkey hosts 3.6 million registered Syrian refugees; Lebanon hosts a million; Jordan hosts 660,000 registered refugees; Iraq hosts 250,000; and Egypt hosts 130,000. Actual numbers, including the unregistered, are even higher. The addition of such large numbers of new people into these countries has placed a severe strain on their labor markets; public-sector services such as education, health, and sanitation; and social cohesion (attitudes and relationships among Syrians and the host communities).

But this situation is not without opportunities for the Syrians to both support themselves through work and to contribute to the economies and societies of their host countries. The future prosperity and stability of the Middle East region and beyond rests on creating mutually beneficial economic opportunities for Syrian refugees and host-country workers. This longer-term challenge requires investments in the host countries—particularly Turkey, Jordan, and Lebanon, which host the largest numbers of refugees and are the focus of this report—to help both their own citizens and the refugees meet their daily needs, legally contribute to their local and regional economies, and to infuse a sense of hope for their future opportunities.

This RAND study, funded by the Qatar Fund for Development, builds on and complements existing work conducted by the governments of Turkey, Jordan, and Lebanon, multilateral agencies, and other donor governments in pursuing the creation of livelihood opportunities for Syrian refugees and citizens in host communities.

This study has drawn upon multiple methods: a context analysis that included a literature review and over 50 stakeholder interviews; 36 focus groups with Syrian, host-country, and other migrant workers in Turkey, Jordan, and Lebanon; 12 in-depth interviews with firms; a survey of Syrian

households (600 per country) and firms (150 per country) in each of these three countries; and exchanges with an advisory council.

Using the qualitative and quantitative data we collected, this study contributes to the existing knowledge base with more expansive analyses than have been conducted before of existing skill sets of the Syrian refugees in Turkey, Lebanon, and Jordan (“supply”). It also addresses the needs of the labor market (“demand”); the steps needed to match the supply and demand; steps needed to improve the overall economic climate; and strategies for preserving and improving social cohesion of refugees and host communities. In contrast to earlier studies, it also includes a comparison of three countries, as well as data about the perspectives of host country and other migrant workers, and the views of firms about the situation. The study provides recommendations for the host-country governments, donor countries, and multilateral agencies in devising actionable policies to help refugees find economic opportunities in host communities and to help host communities minimize disruption to local residents while ensuring overall economic development. It does so in the spirit of a win-win for all stakeholders, with consideration

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for how multiple parties may mutually benefit from new steps.

We first present a country-by-country overview of our findings before we present our policy recommendations.

Turkey

In 2018, 3.6 million Syrians were living in Turkey, and present in all 81 of Turkey’s provinces. The largest populations were in Istanbul (563,000) and in areas near the Syrian border. Our focus groups and household surveys were conducted in Istanbul and the Şanlıurfa and Adana provinces. The firm survey covered three manufacturing and three service industries located close to neighborhoods in which Syrians were concentrated.

Employment and Opportunities for Jobs

An estimated 750,000 to 950,000 Syrians were working in Turkey in 2018.² Among the households in our survey, the percentage of household members aged 18 and older who were working or willing to work was approximately 85 percent for men and 25 percent for women. The percentages of survey respondents willing to work but not working in our sample are 28 percent for men and 55 percent for women, and lower in Istanbul than in Şanlıurfa and Adana.

Our surveys found that although Syrians in Turkey worked across a wide spectrum of jobs, most were doing unskilled and semiskilled work. Performing manual labor, either skilled or unskilled, in textiles, construction, other manufacturing, and services was the most common type of work performed by survey respondents.

There was considerable mismatch between the sector of work and occupations of refugees in Turkey and what they did in Syria, according to our household survey data and the Syrians in our focus groups. Our interviews found that Syrians faced difficulty having education and professional certifications recognized in Turkey. In addition, not knowing the Turkish language was noted as a major employment challenge in both the firm and worker surveys.

One potential reason for the concentration of refugees in low-skilled work could be that Syrians in Turkey had lower levels of education than the population in Syria prior to the war. In our household survey, over half of the respondents had a primary-level education or less, with only 14 percent having postsecondary education. This could be in part because many with higher education moved on to European countries.

Tapping into social networks and visiting employers directly to inquire about work, according to our surveys and focus groups, were the most common means for finding employment. Few household or firm survey respondents reported using formal job-matching platforms.

Syrians were typically hired without work permits (that is, “informally”), were paid wages less than Turkey’s minimum wage, and worked for longer hours than permitted by law, according to our focus groups and surveys.³ Firms in the survey most commonly cited willingness to accept lower wages and benefits as advantages to hiring Syrians, while household survey respondents most commonly cited low wages as a major obstacle to employment. At the same time, a third of Turks also worked informally,⁴ with many paid below the minimum wage.

There were geographical mismatches between where the Syrians were concentrated and where job growth in Turkey was. Government policy prohibited Syrians from leaving their province of registration, yet Syrians have flocked to Istanbul, straining the city’s housing and public services. In the Syrian household survey, the percentage of survey respondents who were not working but were willing to work was relatively lower in Istanbul compared with the other provinces in our sample. Consistent with this finding, focus group participants viewed jobs as readily obtainable in Istanbul and hard to find in the east; not being legally allowed to move for work was a challenge.

Policies and Programs

A 2016 Turkish government regulation granted work permit eligibility to Syrians with Temporary Protection Status, though few such permits have actually been issued (around 16,000 in 2016). Our

interviews and focus groups suggested that the legal framework has not enabled many Syrians to work formally with permits because employers had few incentives to hire Syrians legally: work permit costs could make hiring a Syrian more expensive than a Turk; procedures were not clear to firms or Syrians; Syrians could not legally work outside of their province of registration; and work permit requirements were not commonly enforced, especially for small- and midsized firms.

Programming to help Syrian refugees in Turkey for the first few years after their arrival focused mainly on humanitarian needs, with little attention on employment. Now, multiple stakeholders in the international aid community as well as business associations in our interviews recognized that assistance needed to move beyond humanitarian support to livelihood opportunities, and new approaches were needed. The international aid community has provided some assistance in vocational training (according to our surveys without much in language training); our interviews indicated that these programs have been mostly designed as humanitarian efforts and failed to create significant opportunities for Syrians to find jobs. Vocational training programs to date have not been well coordinated with job placement, market needs, or Syrians’ skills. Our interviews, focus groups, and surveys identified Turkish-language training as one of the most prominent needs. Syrians and Iraqis in our focus groups and household survey also reported little formal assistance with job matching.

Perspectives on Employment Growth

The integration of Syrians into Turkey’s labor market was taking place within a context of downward economic pressure. Annual gross domestic product (GDP) growth has slowed in recent years and inward foreign direct investment (FDI) fell between 2015 and 2017. Turkey’s unemployment rate climbed to 10.9 percent in 2017, with youth unemployment at 20.6 percent. Unemployment was higher in the southeastern regions where many Syrians resided.

Consistent with growing concerns about Turkey’s overall economic climate, few firms in our survey anticipated employment growth over the next

12 months. Respondents indicated a number of policies that could encourage overall employment growth: decreasing the cost of labor, lowering taxes, making it easier to get financing, making it easier to set up a business, and providing or subsidizing training for workers. However, most firm survey respondents did not believe that any policies would increase employment opportunities for Syrian workers. Firms cited low wages as the main reason to hire Syrians. Among those who did suggest policies that would help, language training was the most commonly cited example.

Syrians have been active entrepreneurs in Turkey, setting up over 10,000 registered businesses. Interviews indicated that factors of success for Syrian businesses include business skills brought from Syria, marketing to Syrian consumers inside Turkey, and preexisting trade relations with Middle Eastern countries. Yet, barriers remained to Syrian business growth: lack of Turkish networks, difficulties accessing financing and purchasing property in Turkey, unfamiliarity with how to access Turkish consumer markets, and lack of understanding of Turkish business law, to name a few.

Social Cohesion

Social cohesion between Turkish citizens and Syrians in Turkey has remained stable, despite resentment among the Turks at the presence of Syrians in the labor force and public services; one 2017 survey found that over half of Turkish respondents did not think that Syrians should be allowed to work.⁵ Many Turkish workers in our focus groups were pessimistic about their own employment opportunities and blamed some of this on competition with Syrians. Yet Turkish workers also

expressed compassion for the Syrians and viewed them as hardworking. Turkish workers in these discussions disapproved of employers who hired Syrians informally, paid them low wages, and failed to provide social benefits.

Syrians reported mixed views (both positive and negative) of relations with Turks on the job; however, most Syrian survey respondents reported that workers and employers treated them with respect and did not regularly discriminate against them.

Opportunities and Gaps

Many Syrians were getting by in Turkey, but the focus groups and surveys indicated that most were working in low-wage, low-skill, and informal jobs and that high unemployment rates persisted in Şanlıurfa and Adana. There were a number of challenges to improving the quality and quantity of Syrian employment in Turkey. These included low educational attainment among Syrians; lack of Turkish-language skills; slowing GDP growth and growing unemployment among Turkish workers (particularly among Turkish youth and in the southeast, where Syrians are concentrated); a geographic mismatch between where Syrians were concentrated and locations with the greatest economic growth; a well-intentioned legal framework for Syrian employment that did not incentivize employers to apply for work permits for Syrians; and humanitarian livelihood and vocational training programs that did not meet labor market needs. At the same time, a variety of factors provided opportunities: Many Syrians were finding work; Syrian networks have increased trade with Arab countries; despite Turkish resentment, social cohesion and stability remained; businesses viewed Syrians as a large consumer market; and Syrian entrepreneurs invested in businesses in Turkey.

Jordan

In the most recent Jordanian census, the number of Syrian refugees was estimated at around 1.3 million. About 20 percent resided in camps, and 80 percent lived outside of camps, mainly in urban areas.⁶ Most Syrians were registered in Amman Governorate and in the northern governorates of Mafraq, Irbid, and Zarqa. Our focus groups and household surveys were

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conducted on refugee populations in Amman, Zarqa, Mafraq, and the Zaatari refugee camp. Our firm surveys covered three manufacturing sectors (food and beverages, textiles, and chemicals, which is a strong sector in Jordan), construction, and two service sectors (trade and hotels and restaurants).

Employment and Opportunities for Jobs

Estimates of the number of Syrians currently working in Jordan range from 85,000 to over 330,000.⁷ In our survey sample, the percentage of household members aged 18 and older who were working or willing to work was 70 percent overall: 93 percent for men and 54 percent for women. The *overall* percentage of survey respondents who were willing to work but were not working was lowest in Zaatari at 44 percent, followed by Amman (52 percent), Zarqa (74 percent), and Mafraq (76 percent), though the percentage of survey respondents willing to work but not working was twice as high for women as for men.

Our surveys found that most respondents were working informally, and more were currently working in construction and food and beverage manufacturing compared to the share of those who worked in those sectors before leaving Syria. Given restrictions, survey respondents were concentrated in a smaller number of occupations compared to the range of occupations that respondents reported having in Syria. In our focus groups, Syrians likewise reported working in fields outside of which they had experience.

In contrast to Lebanon and Turkey, where the largest group of respondents had a primary-level education, over 39 percent of respondents across all three Jordanian governorates and 40 percent of respondents in the Zaatari refugee camp reported having an intermediate-level education. However, a larger share of survey respondents reported currently working in unskilled jobs (23 percent) compared to the share that reported working in those types of jobs in Syria (16 percent). Around 45 percent of employed survey respondents indicated that they currently worked in skilled manual labor jobs, which was very similar to the share who reported working in those types of jobs previously in Syria (42 percent).

Tapping into social networks was the most common means of searching for work for both unemployed and employed survey respondents, but those who were working were more likely to have visited an employer to inquire about work in person. Focus groups also suggested that friends, family, and connections were the way most Syrians, Jordanians, and Egyptians found employment.

Difficulty in getting work permits was cited as one of the top obstacles to finding work by Syrians residing in Mafraq and Zarqa. Firms echoed this view, citing the lack of information on rules about hiring and the Syrians' lack of work permits as the main disadvantages of hiring them. Cost of work permits, restrictions on industries, and sponsor availability were key issues reported in our focus groups as well. In-depth interviews with employers indicated they considered Syrians highly skilled, good employees who were willing to work for less; they also introduced healthy competition with Jordanians in the labor market. Willingness to work for less was cited by 47 percent of responding firms as a main advantage of hiring Syrians.

Policies and Programs

Jordan received pledges from the international community at the February 2016 London Conference for the Jordan Compact, which had provisions for support of Jordan's economy as Jordan opened up its labor market to Syrian refugees. Our interviews indicated a number of challenges to fully taking advantage of the benefits of the Jordan Compact. One key provision of the Jordan Compact was to relax the Rules of Origin on certain exports to Europe, for firms located in a specified list of economic zones, provided Syrians made up at least 15 percent of their workforce (rising to 25 percent over time). It proved challenging for firms to recruit Syrians because working in the eligible special economic zones could require relocation, and, to a lesser extent, many refugees worried about losing humanitarian benefits tied to their location, including subsidized shelter and housing. Furthermore, few companies that were eligible to benefit had the resources and know-how to promote their products in European markets. To address these concerns, the Project Management Unit

within the Ministry of Planning and International Cooperation monitored and reported on implementation of the Compact.

Jordan also took steps to make work permit regulations more flexible by temporarily removing the work permit fee, relaxing the requirement for employers to provide proof of social security for their employees when applying for the permit, and adjusting health certification requirements for Syrians.⁸ But as mentioned above, work permits continued to be noted as a thorny issue in focus groups and surveys.

International organizations instituted various vocational and employment-related programs; for example, supporting work opportunities for Syrians and Jordanians on public work projects. However, overall, vocational and employment-related trainings remained a work in progress in Jordan. Slightly less than a third of Syrian respondents (32 percent) reported that they received any kind of training since they arrived in Jordan, though most survey respondents agreed or strongly agreed with the statement that they could get the training and education they needed to gain job-relevant skills. Firms frequently cited the need for assistance with job matching and training. Yet in our focus groups, Syrians did not view international assistance programs to be helpful to Syrians finding employment. Both Syrian and Jordanian focus group participants suggested the need for specific, need-based training, including psychological support and counseling.

Perspectives on Employment Growth

Annual percent growth in GDP was on a steep decline well before the Syrian crisis and has slowed since 2007–2008 due to the global economic

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downturn, regional unrest and insecurity, and domestic energy issues. Annual GDP growth continued at approximately 2–3 percent through 2017. Conflicts and instability in Iraq, Syria, and Egypt were particularly challenging for Jordan in terms of both trade and FDI, resulting in limited demand for Jordanian goods and complicating their movement as well as a broader economic downturn that has affected demand even from the wealthier Gulf states.

Consistent with this macroeconomic situation, the lack of available jobs was the most frequently cited obstacle to employment. And plans for employment growth among firms were decidedly mixed. Manufacturing firms were more likely to anticipate an increase in employment—particularly among unskilled workers—than services firms. Many of the firms that anticipated an increase in employment indicated that Syrians would likely account for up to 25 percent of their hiring if there were no barriers.

To promote overall employment growth, firms in our survey most commonly recommended lowering taxes, decreasing the cost of labor by subsidizing wages and benefits, improving infrastructure, making it easier to set up a business and get financing, making employment regulations clearer and stabler, and assisting with job matching and training. Our in-depth interviews of firms and surveys indicated measures to facilitate the permitting process by increasing the number of occupations and sectors Syrians could work in and providing wage subsidies for Syrians to improve prospects for Syrians in particular.

Social Cohesion

Though the presence of the Syrians has not caused major unrest in Jordan, various reports indicate that the situation occasionally caused tension in local communities. Most Jordanian workers thought that Syrians, to at least some extent, took jobs from locals. Despite these feelings of resentment, Jordanian stakeholders in our discussions cited shared history and culture with Syrians, including extended familial ties, intermarriage, and open travel between the two countries, as the reason for lower incidents of problems between the two communities. There was genuine concern among Jordanians for the plight of Syrians and of their predicament.

Most Syrian survey respondents reported that Jordanian workers and employers treated them with respect and that they were not regularly discriminated against.

Opportunities and Gaps

Challenges remained to providing livelihood opportunities for Syrian refugees in Jordan. Among these were realizing the full potential of the Jordan Compact; improving the business environment in order to attract investment and increase demand for all types of labor; providing targeted training to workers; and easing restrictions on Syrians' working by facilitating training permits and expanding the sectors in which they work. Syrians were finding work, and the fact that manufacturing firms, in particular, were anticipating employment growth (and those firms anticipating growth expect a quarter of this to come from Syrians) were encouraging signs.

Lebanon

The government of Lebanon estimated that there were 1.5 million displaced Syrians in Lebanon, including both registered and unregistered refugees, out of a total population of about 6 million in the country.⁹ Of these, 36 percent were in the Bekaa Valley, 26.5 percent in Beirut, 25.5 percent in North Lebanon, and 12 percent in South Lebanon.¹⁰ Our focus groups and household surveys were conducted on refugee populations in Beirut and Mount Lebanon, the Bekaa, North Lebanon, and South Lebanon. Our firm surveys covered food and beverage, other manufacturing within manufacturing sectors, construction, and three service sectors (trade, hotels and restaurants, and cleaning services, in which Syrians are allowed to work).

Employment and Opportunities for Jobs

Most Syrians in Lebanon worked informally. An estimated 384,000 people comprised the Syrian labor force in Lebanon, of whom an estimated 153,600 were employed.¹¹ In our survey sample, the overall percentage of household members aged 18 and older

who were working or willing to work was approximately 61 percent: 92 percent for men and 30 percent for women. The percentages of survey household members working or willing to work were lowest in the Bekaa at 53 percent (87 percent for men, 23 percent for women) and in the South at 60 percent (93 percent for men, 29 percent for women). For men, the percentages of survey respondents willing to work but not working were relatively low and less than 15 percent in most cases except for the North. For women, the percentage of survey respondents willing to work but not working ranged from 33 percent in the Bekaa (likely due to their involvement in agriculture) to 88 percent in Mount Lebanon.

Construction, agriculture, and environmental services (which mainly involved cleaning work) were the sectors open to Syrian refugees for work under Lebanese law. Previous studies noted a large portion of Syrians in Lebanon worked in these sectors both currently and before the war as well.¹² Our survey respondents were likewise more likely to be working in construction, wholesale and retail trade, and service-related jobs than they had previously in Syria. Many respondents also worked in agriculture, and a small share of respondents worked in hotels and restaurants and in manufacturing. In our focus groups, both Lebanese and Syrians reported working below their qualifications; Syrians occupied jobs Lebanese did not want. Syrians who worked in construction, mining, and mobile phone shops in Syria reported continuing working in these fields in Lebanon.

Around half or more of survey respondents had either a primary-level education or less, which is consistent with earlier studies. Our firm surveys showed Syrians were more likely to be doing unskilled and semiskilled jobs than the overall workforce but *less* likely to be doing unskilled work than other non-Lebanese workers.

As with Turkey and Jordan, among the unemployed, the most commonly cited action taken to find a job was to ask relatives and friends for information about employment opportunities; this suggests the prominence of networks and social groups as the main method to search for employment.

The most commonly cited reasons for not working as reported in our household surveys included

not being able to obtain a work permit (21 percent), believing there is no work (13 percent), and not knowing how or where to look for work (13 percent). Echoing findings from the household survey, respondents in the firm survey most commonly cited the lack of a residency or work permit as a disadvantage to hiring Syrians. In our focus groups, obtaining a residence permit—more so than a work permit—remained of primary importance for Syrians for employment. These groups also revealed that *wasta* (favoritism or nepotism) remained a main barrier for securing employment, particularly among Lebanese. In-depth firm interviews showed Syrians were perceived as hard workers and skilled craftsmen who were willing to accept difficult workplace conditions for less pay. In a similar vein, the firm surveys showed that the advantages of hiring Syrian workers were as follows: they performed the tasks required and were willing to work longer hours and to accept lower wages and benefits than Lebanese workers.

Policies and Programs

The January 2017 Ministry of Labor decision 41/1 reserved various professions for Lebanese citizens but allowed Syrians to work in agriculture, construction, and the environment. Even before the war, Syrians working in Lebanon often did so informally, but Syrians working without a valid work permit were vulnerable to fines or arrest. To apply for the work permits, Syrians must provide various types of documentation, including a valid residence permit. Residence permits have represented a key challenge for Syrian refugees in Lebanon. Several measures have sought to improve the residence permit situation or alleviate related issues in the future. However, as mentioned above, in our surveys and focus groups, the lack of permits emerged as a critical impediment for Syrians to find work.

Various international and local organizations have also implemented vocational training courses and job programs. Despite the numerous vocational training programs, officials from both the private and public sectors expressed concern that many of the efforts were not effective, since training was provided in sectors in which refugees cannot work or

provided little avenue for employment because it was not based on an analysis of market needs.

Perspectives on Employment Growth

In 2006, GDP growth rose as high as 10 percent, but it fell back down to about 1–2 percent annually after the global economic downturn. Low economic growth and high government expenditures (which unfortunately, have not been focused on infrastructure investment) have conspired to increase the debt-to-GDP ratio to 157.3 percent (as of April 2018), which was the third highest ratio in the world. FDI in Lebanon grew substantially in the 2000s during a massive reconstruction phase but then declined after 2009.

Given the weak economy, plans for expanding employment were mixed among firms. Manufacturing firms (especially food and beverage manufacturing firms) were particularly likely to anticipate an increase in employment among highly skilled workers, while construction firms were particularly likely to anticipate a decrease in employment. Nearly all of the firms that anticipated an increase in employment indicated that Syrians would likely account for up to 25 percent of their hiring if there were no barriers.

To encourage overall employment growth, firms in our survey suggested lowering taxes, reducing red tape, easing labor regulations, decreasing the cost of labor (by subsidizing wages and benefits and decreasing social security fees), making it easier to get financing, and providing help connecting to customers and suppliers. To encourage employment opportunities for Syrians in particular, respondents focused on policies to clarify their legal status and to make it easier and less costly to get work permits. Many stakeholders we interviewed mentioned the need for large-scale public works projects fueled by foreign capital as necessary to revive the economy and create jobs for Lebanese and Syrians alike.

Social Cohesion

As the country that hosted the most refugees and displaced persons per capita in the world, Lebanon has made considerable efforts and sacrifices to

accommodate the Syrian refugees. Nevertheless, the sectarian balance among Lebanese communities was fragile, and Lebanese views of Syrian refugees were affected by their own past experience with civil war as well as with the prior Palestinian refugee influx. Among those we interviewed, it was clear that many viewed the continued status quo as untenable. They emphasized the importance of recognizing that the country had a turbulent history with Syria, including an occupation and prolonged military presence, and that these had caused deep-rooted effects on the Lebanese national psyche. This made it much more complex for Lebanese to accept a long-term presence of Syrian refugees in Lebanon. Despite these sentiments, a 2017 UN survey found that over a third of surveyed Syrian refugee households in Lebanon characterized the refugee-host community relations in their area as positive, about half stated that they were neutral, and only 5 percent stated that they were negative or very negative.¹³

In our focus groups, Lebanese felt threatened by the large numbers of Syrians in Lebanon. Lebanese expressed hostility about Syrians, which was likely tied to the poor workplace conditions and tense relations on the job reported by Syrians. On a more positive note, most Syrian survey respondents reported that workers and employers treated them with respect and that they did not face regular discrimination.

Opportunities and Gaps

Lebanon presented a challenging environment to improve livelihood opportunities for Syrian refugees. Training programs were uncoordinated and not market driven; legal requirements for residency and work were complex; sectors in which Syrians could work were quite limited; reforms and increased government capacity emerged as prerequisites for foreign investment; and social stability, often fueled by misperceptions about refugees, remained tenuous. But the situation was not without hope. Manufacturing firms anticipated increasing employment, and Syrians were firmly in the plans of firms that did want to hire. And despite social tensions, most Syrians who were employed felt they were treated with respect and not regularly discriminated against.

The Employment Situation of Syrian Women

The circumstances of displacement have had a large impact on the employment of Syrian women. Our focus groups found that more Syrian women were working in the three host countries than in Syria before the war, although these numbers were still low and many who wanted jobs did not have them. The share of female household members aged 18 and above who were working or willing to work was 25 percent in our Turkey sample, 54 percent in our Jordan sample, and 30 percent in our Lebanon sample. We also found low rates of female employment among firms in our surveys. The share of survey respondents who were not working but were willing to work was 55 percent in our Turkey sample, 84 percent in our Jordan sample, and 58 percent in our Lebanon sample. Working was also viewed in our focus groups as newly empowering the women in some cases and as being more socially accepted, necessary, and respectable by both men and women alike. In most cases, comments were similar among both men and women about how to find a job, types of jobs available, working conditions, and aspirations. At the same time, Syrian women described several challenges particular to women: being paid less than Syrian men, lack of safe transportation to the workplace, childcare and household responsibilities serving as a barrier to work or causing exhaustion when work outside the home could be found, and sexual harassment in some cases. Women often expressed desire for jobs that would enable them to work from home.

Recommendations

Our findings from a review of the literature, stakeholder interviews, focus groups, and household and firm surveys allowed us to suggest recommendations to host governments, individual donor countries, and multilateral agencies to further develop mutually beneficial opportunities for Syrian refugees and the host countries. While there were many similar considerations across the three countries (see Tables 1–3), their contexts were sufficiently different from each other to warrant country-specific recommendations.

TABLE 1
Recommendations for Turkey

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Expand Turkish-language training and capacity , in combination with what is expected in the Turkish workplace	<p><i>Rationale:</i> Lack of Turkish language is a main barrier to Syrian employment. Few Syrians have received Turkish-language training, and there is not enough Turkish-language training to meet demand. Amount/intensity of Turkish-language training is insufficient for many to get a job. Other barriers include lack of high-quality materials and trained teachers. In addition to language, the cultural differences between Syrians and Turks are a related barrier to finding jobs and retention.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Prioritize Syrians in the labor force for spaces in Turkish as a Second Language (TSL) classes. • Create improved TSL course materials. • Train Turkish teachers in TSL. • Expand availability and awareness of web-based and smartphone Turkish-language instruction applications. • Coordinate with Turkey's Ministry of National Education (MONE), teacher training universities, multilateral agencies. • Invest in online course providers such as Duolingo, Rosetta, or other online course. • Make language training part of a broader training and job placement package for Syrians, targeted at organized industrial zones in cities outside of Istanbul (such as Adana, Bursa, and Izmir). • Supplement the language training with training on expectations of Turkish employers and typical characteristics of the Turkish workplace. 	High	Medium	Individual donor countries Multilateral agencies Government of Turkey (MONE)
Expedite recognition of Syrian credentials and educational degrees in Turkey	<p><i>Rationale:</i> Many refugees lack documentation of their educational credentials; many such credentials are in Arabic; and Syrian educational institutions may be unfamiliar to Turkish employers. EU countries have experimented with programs (such as the European Qualifications Passport for Refugees) to create credential validation for refugees, with translation of languages, skills, and quality, in order to help employers understand the qualifications of refugee applicants. In addition, the International Labour Organization (ILO) has developed similar approaches in Jordan. While the government of Turkey has a process to enable foreigners to validate their credentials, few Syrians have used the process.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Adapt the Turkish certification validation process in combination with the European Qualifications Passport for Refugees to the situation of Syrians, Iraqis, and other refugees in Turkey. • Consider establishing Recognition of Prior Learning (RPL) guidelines as suggested by the ILO, to assess occupational skills obtained through informal training and on-the-job experience.^a 	Medium	Low	Government of Turkey (MONE) Individual donor countries (for financing) Multilateral agencies

Table 1—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Conduct demand-driven, on-the-job training for both Syrians and Turks, linked to employment opportunities	<p><i>Rationale:</i> There is a geographic mismatch between where the Syrians are and labor market demand. Although Syrians are not allowed to obtain legal work outside of their province of registration, many Syrians leave their province of registration to move to Istanbul in search of work. However, stakeholder interviews suggested that Istanbul is becoming overburdened. At the same time, stakeholders noted that skill gaps often arise within cities outside of Istanbul, particularly in Organized Industrial Zones (OIZs). What is needed is a targeted set of programs to meet local employment demand, legal changes to allow Syrians moving for work, and relocation incentives and assistance. EU countries have incentivized refugees to move to regions where there is employment demand.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Work closely with a local chamber of industry, organized industrial zone manager, business association, or other job training and matching organization to identify the specific, current needs of manufacturing firms in OIZs located in cities outside of Istanbul, such as Adana, Bursa, or Izmir. • Consider relaxing geographic restrictions on travel and work for Syrians who are willing to relocate to the targeted areas for work, and work with business associations and local governments in those provinces to actively recruit Syrians as well as Turkish workers from other areas. • Coordinate with local government, business associations, MONE, UNDP, IŞKUR, GIZ, and Rizk to implement job-matching and on-the-job training programs for both Syrians and Turks focused on filling the identified skills gaps. 	High	Medium to High	Individual donor countries Government of Turkey Multilateral agencies
Provide safe transportation for women to places of employment	<p><i>Rationale:</i> According to the firm survey results, the share of female workers among Syrian employees is lower than the share of female workers in the overall workforce in Turkey. While there are a number of reasons for this finding, one concern identified by respondents in the Syrian household survey was the lack of safe and reliable transportation for women to reach work.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Work with local transportation providers to develop safe, female-only transportation options for both Syrian and Turkish women to reach their places of employment. • Consider coordinating with large employers, particularly those that employ relatively high numbers of female workers, such as large textile factories. 	Medium	Low	Individual donor countries Multilateral agencies

Table 1—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Build on IŞKUR and Rizk programs in job matching, and expand these in regions with the most Syrians	<p><i>Rationale:</i> IŞKUR is legally permitted to facilitate Syrian employment but may have limited capacity to do so at regional levels. Rizk is a Syrian employment-matching NGO with a track record of job matching for refugees in Istanbul and Gaziantep.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Pay for additional staff at IŞKUR and for opening Rizk offices in provinces with high concentrations of Syrians such as Şanlıurfa, Gaziantep, Bursa, Adana, and Mersin. 	High	Medium	Government of Turkey Individual donor countries (for financing)
Facilitate work permits for Syrians under Temporary Protection Status AND/OR Create a temporary revision to the work permit regulations for Syrians that enables more to work legally	<p><i>Rationale:</i> Few work permits have been issued for Syrian workers. Stakeholder interviews suggest that employers have few incentives to hire Syrians legally due to lack of knowledge about the procedures for applying for a permit, the cost associated with the permit application, and the fact that with the work permit, hiring a Syrian can be more expensive than hiring a Turk. However, without a work permit, Syrians are at greater risk of low pay and dangerous work conditions.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Finance a consulting or legal firm to help employers to process work permit applications. • Cover the costs of the work permit application. • AND/OR Offer automatic temporary (two-year) work permits to Syrians under Temporary Protection Status. 	Medium	Medium	Individual donor countries (for financing) Multilateral agencies Government of Turkey
Start a Syria desk at KOSGEB, Turkey's small and medium-sized (SME) assistance agency	<p><i>Rationale:</i> Syrians have been active entrepreneurs in Turkey, but they face challenges that include lack of local knowledge, networks, and financing. The government SME assistance agency does not have particular help for Syrians.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Finance additional facilitation for Syrian entrepreneurs and staffing at KOSGEB. 	Medium	Low	Government of Turkey Individual donor countries (for financing)
Conduct a joint venture with a large Turkish firm, hiring Turks and Syrians	<p><i>Rationale:</i> A joint venture may offer business opportunities that could also be combined with socially aware hiring.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Hire both Turkish and Syrian workers (up to the allowable 10% allotment), obtaining work permits for all workers and paying both Turkish and Syrian workers at least minimum wage. 	Low	High	Foreign investment companies

Table 1—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
<p>Enhance the current Customs Union (CU) between the European Union (EU) and Turkey, including easing transport, visa, and other barriers under the current CU, moving forward on efforts to deepen the CU, and identifying ways to correct existing asymmetries</p>	<p><i>Rationale:</i> Turkey currently has a CU with the EU. However, the current CU applies to only industrial goods, and has a number of challenges, including (1) there is asymmetry, in that if the EU negotiates a free trade agreement (FTA) with a third-party country, goods from that country can enter Turkey (via the CU), but Turkey does not automatically get access to export to the third-party country unless it negotiates a separate FTA; (2) agriculture and services are not covered; (3) road transport permits are limited; (4) it is difficult for Turkish businesspeople to get visas to do business in the EU. Negotiations to revise and deepen the CU have stalled. Deepening the CU to include services, and making it easier for Turkey to benefit from FTAs that the EU signs with third-party countries, could help to improve Turkey's economic climate by encouraging exports and increase jobs for all.</p>	Medium	Medium	European Union Government of Turkey
<p>Study developing a policy regarding minimum wages for Syrian refugees</p>	<p><i>Rationale:</i> Syrians are reportedly working for much lower wages than Turks, often well below Turkey's minimum wage. At the same time, many Turks work informally and are paid below the minimum wage. The focus groups suggest that Turkish workers in some cases feel that Syrian workers' willingness to accept lower wages undercuts their own wages and employment opportunities; many Turkish workers also feel that such low wages for Syrians are exploitative. In contrast, in the firm survey, firms most commonly cited willingness to accept low wages as an advantage to hiring Syrians, and the most common recommendations by firms for increasing employment opportunities included lowering the cost of hiring workers (for example, by decreasing social security fees or subsidizing wages).</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Study the effects of increasing enforcement of the minimum wage on Syrian and Turkish employment before developing the policy. • Examine the Turkish government's capacity to increase enforcement of the minimum wage. • Examine potential alternatives such as an earned income tax credit, or wage or benefit subsidies, to encourage legal work among both Turks and Syrians. 	Medium	Medium	Government of Turkey Multilateral agencies

^a International Labour Organization, "Manual on Skills Testing and Certification: Jordan," Beirut, Lebanon, 2015 (as of August 1, 2018: http://www.ilo.org/wcmsp5/groups/public/---arabstates/---ro-beirut/documents/publication/wcms_358358.pdf); International Labour Organization, "Recognition of Prior Learning (RPL): Learning Package," Geneva, Switzerland, 2018 (as of August 1, 2018: http://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ifp_skills/documents/publication/wcms_626246.pdf).

TABLE 2

Recommendations for Jordan

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
<p>Offer short vocational training courses on needed skills: air-conditioner maintenance, machine operation and maintenance, building maintenance and facility management (plumbing, carpentry, electricity), welding, cooking, customer relations, entrepreneurial skills, electrical work, information technology, security, hospitality, textiles, retooling jewelry making and wall-building skills</p>	<p><i>Rationale:</i> Current training is not always market relevant or provided in a coordinated way. The resources currently used for training could be spent more effectively</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Offer these to both Jordanians and Syrian refugees (the stigma surrounding vocational education among Jordanians is going down; raising cultural capital in businesses such as beauty salons will further help Jordanian workers). • Especially for manufacturing, focus on training and placing semiskilled workers for both Jordanians and Syrians. • Skills acquired by Syrians can be used for reconstruction when safe to go back. • Crucial to coordinate with other trainers such as GIZ to reduce duplication. • Coordinate with private sector to make the courses market relevant. • Training provided outside of firms, say by an external agency, might decrease turnover (i.e., trainees will not join a firm to take offered training and move to another). • A geographic focus on a port city such as Aqaba (given export potential to Israel, Saudi Arabia, and Egypt) could be helpful. • Assist ILO for certification of skills via exams (ambitious target of 80,000 for 2018). • Improve credentialing in fields such as construction, which will help Jordanians as well, by attracting them to the sector and expanding their employment. • Recognize the existing skills and backgrounds of the trainees in designing the program—many of the direct beneficiaries of training already have relevant skills for services or manufacturing work, while other do not, having either worked on farms their whole life, or in the case of women, having not participated in the labor force in Syria. • Assess the role that organized labor (e.g., General Federation of Jordanian Trade Unions [GFJTU]) can play in providing training to both Syrian refugees and Jordanians. • Develop work placement after training (see recommendation below on matching employees to employers). 	High	Medium	Individual donor countries
<p>Identify promising training initiatives such as ReBootKamp (RBK; a computer coding course with a track record of placement success offered to both Jordanians and Syrians) and scale them up</p>	<p><i>Rationale:</i> In addition to setting up training programs from scratch, proven models can be scaled up with additional investment; for instance, by supporting loan agreements in place.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • RBK trains both Jordanians and Syrians. • RBK targets a higher end sector (information technology) and places Syrians as consultants, but scaling up can be done for any type of training. 	High	Medium to High	Individual donor countries

Table 2—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Improve skills assessment and certification of worker skills	<p><i>Rationale:</i> Skills that workers have are not always certified and therefore not recognized in the labor market, making it difficult for them to find jobs.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Set up another organization to do this or bolster existing efforts by organizations such as the ILO. • More likely to be useful for Syrians. 	Medium	Medium	Individual donor countries
Improve matching of employees and employers	<p><i>Rationale:</i> Training to improve supply of workers and policies to stimulate demand for them are not likely to succeed without efficient matching of employers to employees, and this has been lacking.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Set up another matching agency or bolster existing ones such as recruitment agencies (for specialized skills) or GIZ's initiative with the Ministry of Labor (for general labor). • Work with both Jordanians and Syrians. • Organize job fairs to bring employers and employees together. Even bringing job seekers together with employees who already have jobs will help as informal networks are important in finding jobs. • Matching at the informal level is harder than at the formal, higher-skill levels, since recruiting agencies do not operate much at the informal level. Therefore, matching could be aimed at formal firms ahead of informal firms. Educating firms about matching mechanisms available would be important. • Bolster the role of chambers of commerce in the matching process; employers use them sporadically. • Matching is especially important for Rules of Origin agreement (Jordan Compact)-eligible exporters. • There is also a need for an information broker on the availability of workers as well as policies to hire them, since these signals do not appear to be reaching employers. 	High	Medium to High	Individual donor countries
Address the problem of employee turnover in firms by instituting and enforcing mechanisms such as two-sided notice	<p><i>Rationale:</i> Employee turnover, especially among Syrian workers, is often suggested as an impediment to hiring them; while policy stability is a more first-order issue, reducing this turnover with mechanisms such as two-sided notice is likely to increase certainty and therefore Syrians' employability.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Since all workers will benefit from this, should apply to Jordanians and Syrians • Policy certainty regarding Syrians would most likely help them to be hired, but this is likely to be politically difficult. 	High	High	Government of Jordan (Multilateral agencies can provide capacity building)

Table 2—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Simplify and streamline the procedure of issuing work permits	<p><i>Rationale:</i> The requirement of work permits and the difficulty of obtaining them is an impediment for Syrians entering the labor market.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • More than any subsidy, there is a demand for stability of policy so that employers can hire with peace of mind. • Continue to facilitate opening work permits in sectors such as services and restaurants and food preparation businesses (where there is need and Jordanians do not want to work). • Allow GFJTU to issue permits beyond the currently agreed-upon one year (including allowing them to train Syrian workers on their rights), thereby making permits easier to get. • Clarify and disseminate information about rules on hiring Syrians, for instance by issuing an easy to understand handbook that summarizes work permit and other regulations. • Moreover, if the regulations are in the gazette and have legal status, legal aid staff, employers, workers, and others will have a formal way of accessing them. 	High	High	Government of Jordan (Multilateral agencies can provide capacity building)
Explore enforcing minimum wage laws and working conditions for Syrian workers and for Jordanian workers	<p><i>Rationale:</i> Employers paying lower wages to Syrian workers is a major source of local resentment and also opens these workers to potential exploitation.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Weigh these benefits against the potential loss of demand for Syrian workers. • Given the complexity of the issue, further investigation might be warranted. • Enforce minimum working conditions laws, as poor working conditions, especially in industry, are likely to be a major deterrent, particularly to women who would otherwise be willing to work in textile and other factories. • Examine mechanisms for provision of health insurance and social security for non-Jordanian workers. 	High	High	Government of Jordan (Multilateral agencies can provide capacity building in inspection and enforcement)

Table 2—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Reassess the assistance provided by multilateral agencies to Syrian refugees	<p><i>Rationale:</i> There is local resentment that refugees get this over and beyond (low) wages, which together gives the impression that they are better off than host-country workers.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Keep assistance focused on the most vulnerable, while enabling those who can work to do so. • On the margin, it reduces the incentive for Syrian workers to find jobs. • As the stay of the refugees lengthens, the situation moves from humanitarian to livelihood, and assistance can be viewed as complementary. • Donor fatigue might have set in, which might make reduced assistance inevitable, in any case. • Lessons learned from schemes such as EITC in the U.S. could be explored here (assistance complementary to wages instead of substituting) to give Syrian workers appropriate incentives. Communicate such an incentive-based policy appropriately with refugees. While this will apply to those who are able to work, those who are not able to work due to age, health, or similar considerations would continue to need assistance. 	Medium	Medium	Multilateral agencies
Ease restrictions on the Rules of Origin agreement that is part of the Jordan Compact, such as allowing companies outside the special economic zones to participate, expanding the list of eligible products, and lowering the threshold percentage of Syrian employment	<p><i>Rationale:</i> Very few companies have met the eligibility criteria to participate in the Rules of Origin agreement of the Jordan Compact, decreasing the effectiveness of the program.</p>	Medium	Medium	European Union Government of Jordan
Improve environment for doing business for all	<p><i>Rationale:</i> The Jordanian economy was slowing down even before the refugees arrived; and addressing the structural impediments to economic growth would be needed to improve job prospects for <i>all</i> workers; Jordan came in at 103 out of 190 in the World Bank's 2019 <i>Ease of Doing Business</i> rankings.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Improve "ease of firing" (with appropriate notice) as firms will not take risks and hire in the first place if it is difficult to retrench their workforce if their ideas do not bear fruit. • Shorten duration for approvals and licenses, thereby reducing the cost of doing business. • Improve secured lending laws and insolvency bylaws. • Streamline registration procedures for companies, thereby making it easier to start a business. • Encourage investment by all nationalities, else they will invest elsewhere. Ease passport restrictions for Syrian investors, and assess the high cost of this document against the period of validity. 	High	Medium	Government of Jordan

Table 2—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Increase capacity of government agencies	<p><i>Rationale:</i> All the recommendations would need support from the government agencies and capacity building in appropriate areas would help.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Project Management Unit (PMU) in Ministry of Planning and International Cooperation (MoPIC) is already trying to increase awareness of Jordan Compact through outreach and communication. • Leverage public, private, and multinational resources to provide technical assistance to companies to market their products and improve standards for European markets. 	Medium	Medium	Individual donor countries, in collaboration with the Government of Jordan Multilateral agencies, in collaboration with the Government of Jordan
Invest in large-scale infrastructure projects	<p><i>Rationale:</i> The Jordanian economy was slowing down even before the refugees arrived, and stimulating economic growth would be necessary to improve job prospects for all workers.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Builds capacity for Syrian workers to eventually rebuild Syria. • Addresses much-needed infrastructure development in health, education, transportation, and utilities across multiple sectors that have claimed to be burdened with the influx of refugees. • Increasing the capacity of government agencies as mentioned above (to disburse funding and monitor projects) would be particularly critical for this recommendation to work. 	High	High	Individual donor countries Multilateral agencies
Improve transportation infrastructure and services to factories in the industrial zones, particularly targeting both Jordanian and Syrian women	<p><i>Rationale:</i> One of the key barriers to link Syrian women to work opportunities in the zones is transportation to and from the zone.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Transport could target Syrians in both camp and noncamp settings as well as Jordanians. • Transportation to large manufacturing firms could be targeted first to achieve efficiencies of scale. 	High	High	Individual donor countries Multilateral agencies

TABLE 3

Recommendations for Lebanon

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Offer short vocational training courses on needed skills: security/alarms, mechanical and other technical skills, construction, English, cooking and other restaurant work	<p><i>Rationale:</i> Current training is not always market relevant or provided in a coordinated way.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Offer these to both Lebanese workers and Syrian refugees. • Training to Syrians assumes the fields in which they would be allowed to work are expanded (see recommendation below). • Identify firm needs for highly skilled workers and provide appropriate training and placement services. • Firms say they have no incentive to train as employees leave after training, which is why governmental help would be required. • At the same time, this needs private sector involvement; e.g., use fiberoptic firm to train in factory setting through internships; would also address the issue of some viewing training as an opportunity to socialize and get free meals. • Training aimed at strengthening skills of Syrians would also be beneficial upon their eventual return and the rebuilding of Syria. • Develop work placement after training (see recommendation below on matching employees to employers). 	High	Medium	Individual donor countries
Decrease restrictions on sectors where Syrians can work	<p><i>Rationale:</i> Bakery, hospitality, and driving are some of the jobs Syrians can do, especially because there is a gap in supply by nationals (based on interviews and focus groups).</p>	High	High	Government of Lebanon
Facilitate obtaining work permits	<p><i>Rationale:</i> Workers are either reluctant to search for jobs without permits or employers do not offer them jobs. Focus groups and surveys repeatedly point to difficulty of obtaining permits as a major impediment to finding a job.</p>	High	High	Government of Lebanon

Table 3—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Address the problem of employee turnover in firms by instituting and enforcing mechanisms such as two-sided notice	<p><i>Rationale:</i> Employee turnover, especially among Syrian workers, is high; as mentioned above, this is a disincentive for firms to provide training; while policy stability is a more first-order issue, reducing this turnover with mechanisms such as two-sided notice is likely to increase certainty and therefore Syrians' employability and training opportunities.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Should apply to all workers. • Policy certainty regarding Syrians would most likely help them to be hired, but this is likely to be politically difficult. 	High	High	Government of Lebanon (Multilateral agencies can provide capacity building)
Increase capacity of government agencies	<p><i>Rationale:</i> Foreign investment is unlikely to flow unless there is a suitable capacity for governance, procurement, etc.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Help in decentralized implementation of projects—develop capacity of municipal governments including their coordination and management across the multiple NGOs that are working in their geographical jurisdiction. • Seek complementary responses to those provided by the central government, such as local government responses, including public-private and people partnerships. • Help build an efficient monitoring system. • Ensure that development of human capital in government agencies includes local and municipal governments in socioeconomically challenged areas of the country that have been historically neglected, and in whose jurisdictions Syrian refugees are likely concentrated. 	High	Medium	Individual donor countries in collaboration with the Government of Lebanon Multilateral agencies, in collaboration with the Government of Lebanon
Improve matching of employees and employers	<p><i>Rationale:</i> Training to improve supply of workers and policies to stimulate demand for them are not likely to succeed without efficient matching of employers to employees, and this has been lacking.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Set up another matching agency or bolster existing ones such as recruitment agencies. • Matching at the informal level is harder than at the formal, higher-skill levels, since recruiting agencies do not operate much at the informal level. 	High	Medium to High	Individual donor countries

Table 3—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Address the negative perceptions on assistance provided by multilateral agencies to Syrian refugees	<p><i>Rationale:</i> There is local resentment that refugees get this over and beyond (low) wages, which together makes them perceived as better off than host-country workers; some experts feel these are just negative perceptions with little basis in reality.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Highlight the economic contributions of the refugee response to address negative perceptions. • On the margin, assistance could reduce the incentive for Syrian workers to find jobs. Lessons learned from schemes such as EITC in the U.S. could be adopted here (assistance complementary to wages instead of substituting) to give Syrian workers appropriate incentives. Communicate such an incentive-based policy appropriately with refugees. While this will apply to those who are able to work, those who are not able to due to age, health, or similar considerations would continue to need assistance. • Donor fatigue might have set in, which might make reduced assistance inevitable, in any case. 	Medium	Medium	Multilateral agencies
Address the gap between reality and perceptions regarding Syrian refugees	<p><i>Rationale:</i> The public is not always aware of the facts about refugees, leading to resentment.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Provide assistance to institutions like the Issam Fares Institute at the American University of Beirut to get the facts out and negate misperceptions. • Work through community-based organizations including religious bodies and respected members (including politicians) of each confessional community. • Identify and support champions across the Lebanese community, particularly high-profile and visible members, and communicate the new narrative through media (TV, newspapers) and film. • Highlight the good work done by Syrians through visual means (such as pictures of Syrians contributing to the society and the economy) to create a positive image. 	Medium	Low	Government of Lebanon Individual donor countries Multilateral agencies

Table 3—Continued

Recommendation	Notes (Rationale, Addressed Problem, Implementation Considerations)	Priority	Costs and Risks of Implementation	Suitable for Whom?
Improve environment for doing business for all	<p><i>Rationale:</i> The Lebanese economy was slowing down even before the refugees arrived, and addressing the structural impediments to economic growth would be needed to improve job prospects for <i>all</i> workers.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Improve access to finance, which is noted as a leading impediment by firms. • Reduce red tape, and thereby the cost of doing business. • Improve the electricity infrastructure. • Help with market expansion activities—where to sell? Set up a Lebanese Development Authority similar to Ireland’s Industrial Development Authority (IDA). Lebanon is well known for niche products such as furniture and food products, which could be marketed abroad. • Link SMEs to markets (say, by funding incubators like Berytech). 	High	Medium	Government of Lebanon Individual donor countries Multilateral agencies
Invest in large-scale infrastructure projects	<p><i>Rationale:</i> The Lebanese economy was slowing down even before the refugees arrived, and stimulating economic growth would be necessary to improve job prospects for all workers.</p> <p><i>Implementation considerations:</i></p> <ul style="list-style-type: none"> • Helps both Lebanese and Syrian workers. • Builds capacity for Syrian workers to eventually rebuild Syria. • Increasing the capacity of government agencies as mentioned above (to disburse funding and monitor projects) would be particularly critical for this recommendation to work. • Addresses much-needed infrastructure development in health, education, transportation, and utilities across multiple sectors that are claimed to have been burdened with the influx of refugees. • Provides the greatest opportunity to make much-needed infrastructure investment in the most vulnerable and traditionally neglected areas and regions, where Syrian refugees also happen to be concentrated. 	High	High	Individual donor countries Multilateral agencies, including the international private sector

Notes

¹ United Nations High Commissioner for Refugees, “Syria Regional Refugee Response,” New York, data tables, May 10, 2018 (as of May 16, 2018: <http://data2.unhcr.org/en/situations/syria>); United Nations High Commissioner for Refugees, “Syria: Internally Displaced People,” webpage, 2018 (as of May 16, 2018: <http://www.unhcr.org/sy/internally-displaced-people>); Phillip Connor, “Most Displaced Syrians Are in the Middle East, and About a Million Are in Europe,” Pew Research Center, 2018 (as of June 26, 2018: <http://www.pewresearch.org/fact-tank/2018/01/29/where-displaced-syrians-have-resettled/>).

² International Crisis Group, *Turkey’s Syrian Refugees: Defusing Metropolitan Tensions*, Brussels: Europe & Central Asia Report No. 248, January 29, 2018 (as of April 15, 2018: <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/turkey/248-turkeys-syrian-refugees-defusing-metropolitan-tensions>).

³ It is worth noting that “informality” has a different connotation when applied to Syrians versus nationals. In general, an informally employed Syrian is working without a work permit, while an informally employed national is working without being registered for social security. Despite potential confusion, we use “informal” for both types of workers, given the prevalence of this colloquial usage.

⁴ Turkish Statistical Institute, website (as of August 3, 2018: <http://www.turkstat.gov.tr/Start.do>).

⁵ Murat Erdoğan, “Thank You and a Question,” email to RAND, Santa Monica, Calif., July 25, 2018.

⁶ United Nations High Commissioner for Refugees, “Jordan,” New York, Fact Sheet, February 2018 (as of July 2018: <https://data2.unhcr.org/en/documents/download/62029>); United Nations High Commissioner for Refugees, “Syria Regional Refugee Response,” 2018.

⁷ Susan Razzaz, *A Challenging Market Becomes More Challenging: Jordanian Workers, Migrant Workers and Refugees in the Jordanian Labour Market*, Beirut: International Labour Organization, 2017, p. 29 (as of July 11, 2018: https://www.ilo.org/beirut/publications/WCMS_556931/lang--en/index.htm).

⁸ International Labour Organization, Regional Office for Arab States, *Work Permits and Employment of Syrian Refugees in Jordan: Toward Formalising the Work of Syrian Refugees*, Beirut, 2017 (as of July 11, 2018: https://www.ilo.org/beirut/publications/WCMS_559151/lang--en/index.htm); Razzaz, 2017.

⁹ Government of Lebanon and the United Nations, *Lebanon Crisis Response Plan 2017–2020*, Beirut: United Nations Lebanon, January 2017, p. 116.

¹⁰ United Nations High Commissioner for Refugees, “Syria Regional Refugee Response,” 2018.

¹¹ Inter-Agency Coordination Lebanon and United Nations Development Programme (UNDP), “Annex 2: Unofficial Translation: Decision Number 1/41, 31/1/2017,” in *Questions & Answers for LCRP Partners: Recent Demonstrations and Municipal Restrictions against Syrian Refugees Labour Competition and Businesses*, Lebanon: Inter-Agency Coordination Lebanon and UNDP, June 23, 2017 (as of April 15, 2018: <https://reliefweb.int/sites/reliefweb.int/files/resources/SoStQ%26AonRecentLabourProtests-final.pdf>).

¹² United Nations High Commissioner for Refugees, United Nations Children’s Fund, and World Food Programme, *Vulnerability Assessment of Syrian Refugees in Lebanon—VASyR 2017*, New York: United Nations High Commissioner for Refugees, December 2017, p. 70; Inter-Agency Coordination Lebanon and United Nations Development Programme (UNDP), “Annex 2: Unofficial Translation: Decision Number 1/41, 31/1/2017,” in *Questions & Answers for LCRP Partners: Recent Demonstrations and Municipal Restrictions against Syrian Refugees Labour Competition and Businesses*, Lebanon: Inter-Agency Coordination Lebanon and UNDP, June 23, 2017 (as of April 15, 2018: <https://reliefweb.int/sites/reliefweb.int/files/resources/SoStQ%26AonRecentLabourProtests-final.pdf>); Rosalie Berthier, “Lebanese Economy Watchdog: 2. Monetising Syrian Refugees,” Synaps.network, December 11, 2017 (as of April 12, 2018: <http://www.synaps.network/lebanese-economy-watchdog#chapter-3177383>).

¹³ United Nations High Commissioner for Refugees, United Nations Children’s Fund, and World Food Programme, 2017, p. 16.

About This Report

The Syrian Civil War has displaced 60 percent of its 23 million population, with 5.6 million Syrians living in neighboring Middle East countries as refugees. Turkey, Jordan, and Lebanon host the largest numbers of Syrians. The addition of large numbers of people into these countries has placed a severe strain on their labor markets, public-sector services, and social cohesion. But this situation is not without opportunities for the Syrians to contribute to the economies of these host countries. The future prosperity and stability of the region rests on creating mutually beneficial economic opportunities for Syrian refugees and host-country workers.

This RAND study, funded by the Qatar Fund for Development (QFFD), builds on and complements existing work conducted by the governments of Turkey, Jordan, and Lebanon; the United Nations; and other donor governments in pursuing the goal of creation of jobs for Syrian refugees and citizens in host communities. Using in-depth interviews, focus groups, surveys of Syrian households, and surveys of firms, it conducts an analysis of existing skill sets of the Syrian refugees in Turkey, Lebanon, and Jordan (“supply”), the needs of private sector companies (“demand”), the steps needed to match the supply and demand, the changes needed to improve the overall economic climate, and strategies for improving social cohesion of refugees and host communities.

The study provides recommendations for its primary intended audience of the host-country governments, donor countries, and multilateral agencies in devising practical policies to help refugees find economic opportunities in host communities and to help host communities minimize disruption to local residents while assuring overall economic development. We also aim to make this report accessible to general readers who may be interested in the Syrian refugee situation in the Middle East and in possible solutions to provide Syrian refugees with livelihood opportunities.

This study was undertaken by RAND Education and Labor, a division of the RAND Corporation that conducts research on early childhood through postsecondary education programs, workforce development, and programs and policies affecting workers, entrepreneurship, financial literacy, and decisionmaking.

Krishna B. Kumar, a senior economist at RAND, is the principal investigator of this study, and Shelly Culbertson, a senior policy researcher at RAND, is the coprincipal investigator. Dr. Kumar may be reached via email at kumar@rand.org or by phone at 310-393-0411 x7589. Ms. Culbertson may be reached via email at shellyc@rand.org or by phone at 412-683-2300 x4666.

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