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IFRC

INTERSECTORAL VULNERABILITY STUDY

LIVING ON BARE MINIMUM: AN EXPLORATION OF THE VULNERABILITY OF REFUGEES IN TÜRKIYE

ROUND 2
2022

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ACRONYMS AND ABBREVIATIONS

C-ESSN   Complementary Emergency Social Safety Net

DEEP   Data Entry & Exploration Platform

DG NEAR   European Commission's Directorate-General for Neighbourhood and Enlargement Negotiations

ECHO   European Civil Protection and Humanitarian Aid Operations (European Union)

ESSN   Emergency Social Safety Net programme

GPPi   Global Public Policy Institute

HH   Household

IFRC   International Federation of Red Cross and Red Crescent Societies

ILO   International Labour Organization

IVS   Intersectoral Vulnerability Study

LCSI   Livelihood Coping Strategy Index

MEB   Minimum expenditure basket

PDM   Post-distribution monitoring

rCSI   Reduced Coping Strategy Index

rFCSI   Reduced Food Coping Strategy Index

SAT   Structured analytical technique

TRC   Türk Kızılay

TRY   Turkish lira

TurkStat   Turkish Statistical Institute

WFP   World Food Programme

1. EXECUTIVE SUMMARY

ESSN AND C-ESSN PROGRAMMES AND IVS-2 BACKGROUND

Funded by the European Union's Civil Protection and Humanitarian Aid Operations (ECHO) since 2016, the Emergency Social Safety Net programme (_ESSN_) is implemented by the International Federation of Red Cross and Red Crescent Societies (IFRC) in partnership with the Türk Kızılay (TRC) and includes the distribution of cash assistance for more than 1.5 million refugees living in Türkiye.[1] Recipients of the programme receive a debit card, which they can use to purchase the goods and services they need and withdraw cash. This type of assistance provides freedom, dignity and independence to the eligible households. Each household member receives TRY (Turkish lira) 230 every month, in addition to regular quarterly top-ups depending on household size and one-off top-ups when necessary. Since July 2022, a gender-adjusted dependency ratio has been used to target ESSN recipients. For instance, households without working-age men are considered eligible depending on the number of working-age women and the total number of household members.

In addition to the ESSN, the Complementary Emergency Social Safety Net (C-ESSN) was launched in July 2021 by the Ministry of Family and Social Services, together with the TRC. It is funded by the European Commission's Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR) and aims to target the most vulnerable refugee households, taking over a share of the ESSN caseload.

The second round of the Intersectoral Vulnerability Study (IVS-2) was designed to assess the vulnerability status and the severity of humanitarian conditions of the refugee population in Türkiye.[2] It is based on a tailored analytical framework, a representative sample at regional and affected group level (ESSN- and C-ESSN-eligible and ineligible refugees), and the latest methodological advances in measuring humanitarian severity and vulnerability at the intersectoral level. The exercise builds on and complements the findings of IVS-1 conducted in 2021. The 2021 methodology was improved as better physical access to the refugee population was possible due to the lifting of COVID-19 restrictions. The questionnaire and methodology were strengthened based on lessons learned from the first round, and adapted for face-to-face interviews conducted between December 2021 and July 2022. To date, the study offers the most comprehensive and representative picture of the changes in humanitarian conditions of the refugee population in Türkiye since the end of the COVID-19 pandemic.

1 • "Refugee" refers to foreigners who are under international protection or temporary protection according to the Law on Foreigners and International Protection. Here the term is used to refer to their legal status.
2 • IVS-2 focuses on all ESSN applicants, including recipients from both the ESSN and the C-ESSN programmes (they have applied for cash assistance and fit the eligibility criteria) and non-recipients (they have applied for cash assistance but do not match the eligibility criteria).

MAIN FINDINGS

Context

Türkiye hosts four million refugees and asylum seekers, of whom 90 per cent are Syrian (3.65 million), comprising 4.5 per cent of the total population of the country, estimated to be 86 million in 2022. Arrivals have slowed down since 2018, with the overall number of refugees remaining identical for the past five years (*Ministry of Interior*, September 2022). In 2021, the Afghan crisis led to a new influx of refugees in Türkiye, as the Taliban regained control over the country. The Turkish government reported close to 22,000 Afghans applying for international protection by the end of 2021. More recently, the war in Ukraine resulted in a wave of refugees fleeing to Türkiye, with more than 145,000 individuals recorded by the government by May 2022 (*Ministry of Interior*, September 2022; *UNHCR*, May 2022). Since January 2022, supporting refugees' return has become a priority for the government. The Ministry of Interior reported that more than half a million Syrians have returned voluntarily to their home country (*Foreigner Residence Services*, September 2022).

Impact on income and expenditure

Both eligible (ESSN and C-ESSN recipients) and ineligible refugee households are suffering from the economic deterioration in Türkiye, especially from high inflation (80 per cent annual rate registered in August 2022) and the rising cost of basic commodities such as food (116 per cent annual increase for a basic food basket), energy (54 per cent increase from January to June 2022), gas (174 per cent increase since 2021), rent (61 per cent annual increase in housing costs) and basic household items (*WFP*, August 2022; *TurkStat*, April 2022; *Reuters*, 1 September 2022).

ESSN-eligible households reported a large increase in their median income (TRY 3,180 in IVS-2 compared with TRY 1,200 in IVS-1), as did non-recipients (TRY 4,250 vs TRY 1,800)[3], following the corrective economic measures adopted by the government, notably the two consecutive minimum wage increases at the end of 2021 and in mid-2022. The main sources of cash income for all affected groups include paid work (median amount of TRY 2,500 among households with paid work), loans from friends or relatives (TRY 1,500 among those who received such loans) and cash assistance from the ESSN programme (TRY 930). Households' debt level is similar to that recorded in IVS-1 and reached two months' salaries on average, with 72 per cent of households reporting currently having debts.

The combined effect of increased incomes and high price inflation resulted in a significant increase in household expenditure. Median expenditure has increased more than 100 per cent over the last year, from TRY 2,560 to TRY 5,926 for ESSN recipients, compared with TRY 2,500 to TRY 6,053 for non-recipients. Nearly 80 per cent of income expenditure is allocated to food, shelter, energy, education and hygiene items. Average food, energy and hygiene expenditure has doubled compared with last year. Education expenditure has also considerably increased due to the cost of sending children back to school after COVID-19 (transport, equipment, uniforms, etc.). Expenditure has increased slightly for all other items, most likely due to households prioritizing the most critical items and sacrificing less important goods and services.

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3 · Median income levels, excluding any financial assistance from the ESSN or C-ESSN.

Living standards

Overall, 13 per cent of refugees interviewed face severe difficulties in meeting all their basic needs; 47 per cent face moderate difficulties; 34 per cent face stressed conditions; and only 6 per cent are comfortable in meeting their needs. Households' overall ability to meet their basic needs has slightly improved compared with 2021 (the most extreme deprivations have generally disappeared), probably due to the end of COVID-19 restrictions and the wage increases that led to households' raised income.

Fifty-nine per cent of households interviewed are reported to be living in bad-quality housing, especially the most vulnerable. Ninety-six per cent of households rent their housing and fewer than 1 per cent own their dwelling. Thirteen per cent of households share their home with other families, especially in Istanbul (23 per cent) and in the Marmara and Aegean region (20 per cent). Electricity is widely available, as are separate kitchens, safe water, sanitation facilities and waste management. As expected, non-vulnerable households have more durable assets compared with vulnerable ones.

Only 7 per cent of households reported they are comfortable enough to meet food, housing, energy, education and hygiene needs, which account for 80 per cent of households' average monthly expenditure. Eighteen per cent often have to prioritize expenses, and 1 per cent report not being able to meet their basic needs at all. Seventy-three per cent can barely meet these five needs (food, housing, energy, education and hygiene) with their current income. Housing rental costs being the least adjustable expense, households tend to deprioritize first food, education and energy expenses.

Coping mechanisms

Refugee households have to make sacrifices to maintain minimum living standards over time. IVS results show that the proportion of households engaging in moderate and severe coping strategies has slightly increased over the last year (from 16 to 18 per cent)[4].

Food-related coping strategies are at their highest historical level for ESSN and C-ESSN recipients and non-recipients, especially in Istanbul and the Marmara and Aegean region. Despite higher incomes, refugee households rely increasingly on negative food coping strategies to deal with high food prices. Compared with IVS-1, the reduced Coping Strategy index (rCSI) rose by 30 per cent for eligible households and by 35 per cent for ineligible households. Relying on less preferred or less expensive food was the most frequently adopted strategy, followed by reducing the portion size of meals, reducing the number of meals eaten per day and restricting adult portions. While highly vulnerable households have to rely on all possible food coping strategies, one-third of households considered non-vulnerable also have to rely on less preferred or less expensive food.

Surprisingly, the severity of the livelihood coping strategies adopted by refugees has reduced over the last year and is currently slightly greater for non-recipients than recipients. This is most likely a positive effect of the cash assistance received by recipients. Buying food on credit, borrowing money from non-relatives and selling productive assets are the main strategies adopted. Highly vulnerable households use negative coping strategies more frequently than any other groups, including buying food on credit (84 per cent compared with 20 per cent of non-vulnerable households), borrowing money (71 per cent vs 31 per cent of non-vulnerable households) and selling productive assets (60 per cent vs 4 per cent of non-vulnerable households). Other coping strategies used by the highly vulnerable include reducing non-essential expenditure (15 per cent, with an additional 12 per cent reporting being unable to use this coping strategy any more), selling household goods or assets (19 per cent, with an additional 8 per cent reporting they have exhausted this possibility), removing children from school (18 per cent) and involving children in income-generating activities (12 per cent).

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4 • The coping mechanisms are utilized to measure coping capacity through economic vulnerability and livelihood coping strategies.

Physical and mental well-being

Physical and mental health difficulties continue to be relatively present in the daily lives of refugee households, mostly among children and women. One in four households reported having at least one person facing difficulties carrying out daily activities due to a physical or mental problem, with the highest proportions found in the Mediterranean and Marmara and Aegean regions, where the refugee population is generally older. Nine per cent of households include at least one person living with a mild or severe form of disability ("a lot of difficulties" or "cannot carry out daily activities at all"). Of these, 79 per cent suffer from physical disability, 19 per cent from mental disability, and 2 per cent from both. For an unknown reason, the likelihood of mental health problems is higher in children (22 per cent) than adults (18 per cent), and more frequent in girls (23 per cent) than boys (16 per cent). The burden of disability is very high on vulnerable households, with nearly half of highly vulnerable households having members with disabilities, compared with only 7 per cent of non-vulnerable households.

Nearly 70 per cent of respondents indicated that one of their household members had been sick in the 30 days preceding the survey. Ninety-seven per cent reported they were able to access healthcare, and only 4 per cent reported the service received did not meet their needs, overall therefore indicating very good access to healthcare. Those who lacked access struggled mostly with the cost (healthcare and transportation), but also because of the poor quality of services and language barriers.

Regarding social interaction incidents, 7 per cent of households interviewed reported they had suffered from verbal or physical assaults, a very similar finding to IVS-1 and in line with the existing literature showing generally good cohesion between refugees and host communities.

SEVERITY OF HUMANITARIAN CONDITIONS AND VULNERABILITY

Severity measurements in 2021 and 2022 indicate that the proportion of people with severe or critical needs has reduced slightly since the end of the COVID-19 pandemic.[5] The percentage of households facing severe conditions is nearly zero in IVS-2 (compared with 2 per cent in IVS-1), indicating a normalization of extremes after the severe deprivations suffered by some refugee households during COVID-19. The percentage of households in moderate need fell from 22 per cent in 2021 to 18 per cent in 2022. However, the proportion of refugees in stressed conditions has increased by 13 percentage points compared with IVS-1, and the proportion of respondents in normal conditions has decreased by 7 percentage points, most likely due to high inflation, soaring prices of basic commodities and increased expenditure.

As the humanitarian conditions faced by refugee households do not include any critical cases or widespread life-threatening conditions, the severity of humanitarian conditions is not widely referred to in this report, as it lacks discriminatory power. Instead, the IVS-2 methodology allowed for the identification of four vulnerability classes, from "not vulnerable" to "highly vulnerable". In total, 2 per cent of the refugee households who applied to the ESSN in Türkiye are considered not vulnerable, 38 per cent slightly vulnerable, 50 per cent moderately vulnerable and 10 per cent highly vulnerable (Figure 1).

Figure 1. Percentage of households per vulnerability status

| Not vulnerable 2% | Slightly vulnerable 38% | Moderately vulnerable 50% | Highly vulnerable 50% |

5 · The IVS methodology categorizes household severity using five severity classes: normal, stressed, moderate, severe and critical (see definitions in Annex 2). Households falling in the moderate, severe and critical categories are considered in need of additional humanitarian assistance.

The IVS analysis framework includes causal pathways allowing us to better understand the chain of causes and consequences at play and to identify the drivers of the crisis and its underlying mechanisms. The main drivers and characteristics of high vulnerability include the following:

- Highly vulnerable households have a lower percentage of adults 18–59 years old (39 per cent vs 73 per cent of the non-vulnerables) and a higher percentage of children (61 per cent vs 27 per cent). They also have fewer male adults (18 per cent vs 41 per cent) and more female members than males. The average number of members in highly vulnerable households is 6.6, vs 4.6 for non-vulnerable households.

- In general, highly vulnerable households include more members with specific needs: 13.5 per cent include a member with a chronic illness (vs 5.7 per cent of non-vulnerable households); and 5.6 per cent include a member with a disability (vs fewer than 1 per cent of non-vulnerable households).

- Fifty-one per cent of highly vulnerable household members do not speak any Turkish, vs 9 per cent of non-vulnerable household members.

- Thirteen per cent of highly vulnerable households are totally illiterate, compared with only 2 per cent of non-vulnerable households. Sixty-six per cent have reached only primary school level of education or have no school education at all, compared with 30 per cent of non-vulnerable households.

- Sixty-six per cent of highly vulnerable households want to integrate in their current locations, compared with 85 per cent of non-vulnerable households.

- Ninety-five 95 per cent of the highly vulnerable report suffering from barriers in accessing job opportunities, compared with 68 per cent of non-vulnerables.

The main findings of IVS-2 and the relationships between issues are summarized in the problem tree below (Figure 2).

Figure 2. IVS-2 intersectoral problem tree

Priority regions	Priority groups	Priority issues
Severity of humanitarian conditions and vulnerability at similar levels across the five assessed regions.	In total, 2% of the refugee households who applied for assistance in Türkiye are estimated as not vulnerable, 38% slightly vulnerable, 50% moderately vulnerable and 10% highly vulnerable. ESSN recipients are slightly more vulnerable than C-ESSN. Vulnerability is strongly associated with the number of working-age members in households.	Shelter, food and energy are priority needs (64% of expenditure share). Prices of food and energy are expected to increase during the winter. Shelter rent will also increase as soon as contracts end. Cash assistance continues to be the preferred response by households.

Living standards – 13% of HHs face severe difficulties in meeting their basic needs, 47% moderate difficulties, 34% are stressed. Only 6% are always comfortable meeting their most basic needs. A slight improvement in meeting basic needs is observed compared with last year.

- 79% of HHs are below the MEB.

- 98% of HHs have no savings.

- 96% of HHs rent their homes and 59% reported living in poor-quality housing. 13% share their home with other families, especially in Istanbul (23%), and the Marmara and Aegean region (20%).

- Almost all respondents have access to electricity and safe water.

- Only 8% of HHs use an outside toilet.

- 97% of HHs have their waste collected by the municipality.

- 99% of HHS have access to electricity for lighting.

Coping mechanisms – Despite higher incomes, refugee households rely increasingly on negative food coping strategies. rCSI scores are at their highest historical level for all groups, especially in Istanbul and the Marmara and Aegean region.

- Compared with IVS-1, the rCSI rose by 30% for eligible HHs and 35% for ineligible HHs. Relying on less preferred or less expensive food, reducing the portion size of meals, reducing the number of meals eaten per day and restricting adult portions as the main food coping mechanisms.

- Buying food on credit, borrowing money from non-relatives and selling productive assets are the main livelihood strategies adopted.

Physical and mental well-being – 25% of HHs include at least one person with some difficulties (mental or physical). 9% of households include at least one person with a mild or severe form of disability ("a lot of difficulties'" or "'cannot carry out daily activities at all'").

- 79% of people with mild or severe disability suffer from physical problems, 19% from mental problems, 2% from both. Mental health difficulties are more prevalent among children and female members.

- 69% of HHs with at least one person sick in the past 30 days requiring medical care. 97% reported that they were able to access healthcare and only 4% reported the service received did not meet their needs, indicating very good access to healthcare. Those who lacked access struggled mostly with cost (care and transportation) but also due to the quality of services and language barriers.

Impact on people

↑

- 86% of HHs with at least one member working. 7% of the working individuals are children. Low wages and difficult working conditions reported. 93% work informally.

- Median income moved from TRY 1,200 in 2021 to TRY 3,180 for ESSN recipients, and from TRY 1,800 to TRY 4,250 for non-recipients. C-ESSN HHs only report TRY 2,100 income per month. For all groups, the main source of income is paid work, followed by loans from friends or relatives.

- 72% of HHs have debts, especially the most vulnerable. Median HH debt is TRY 3,000.

- 98% of HHs do not have any savings.

- ESSN recipients spend a median of TRY 5,926 per month and non-recipients TRY 6,053. Most important increase in expenditure is food commodities (twice more over the last year). Food, rent, energy, education and hygiene items account for nearly 80% of expenditure.

- 11% did not send their children back to school after COVID-19. High increase of education expenditure due to the return to school.

Impact on services

↑

- 116% annual increase for food basket price, from TRY 196 to TRY 423 (WFP, 23 Aug. 2022).

- 54% inflation from January to June 2022 for energy prices (electricity and gas) (TurkStat).

- Annual housing costs increase of 61% by April 2022.

- Transportation costs increased by 105% annually.

- Communication prices increased by 18% annually (TurkStat).

- MEB value increased from TRY 858 in Jan. 2022 up to TRY 1,083 in Jul. 2022.

↑

Politics

- General elections set for 2023 with growing anti-migrant discourse.

- Increased voluntary repatriation and deportation (from 11% to 53% in 2021). Construction of houses in safe areas of Syria to relocate Syrians.

- Residency permit quotas adopted in Jul. 2022 restrict to 20% the maximum ratio of foreigners per area.

- Restriction on trips back to Syria for religious holidays (May and Jul. 2022).

↑

Economics

- Despite COVID-19 restrictions, GDP went up by 11% in 2021.

- 80% annual inflation by Aug. 2022 (highest rate since 1998).

- TRY depreciation (27% loss against USD in 2022).

- Impact of war in Ukraine on oil/gas, food prices and tourism.

- Unemployment rate fell back from 13,7% in 2019 to 10,6% in 2022 (TurkStat).

↑

Sociocultural

- Only 7% of refugee households have members who experienced physical or verbal assaults in the last three months. Increased social tensions due to political and media anti-migrant rhetoric.

- Host community concerns about refugees' impact on the economy.

- Language and work regulations limit refugees' integration. Only 48% of refugees speak intermediate/advanced level of Turkish language.

OUTLOOK

According to the World Bank and the OECD, economic deterioration in Türkiye is expected to continue in 2023 and will be characterized by rising inflation affecting all basic commodities (food, gas, electricity, rent, etc.). Depreciation of the Turkish lira and continuation of the war in Ukraine will have a direct impact on price increases, with the inflation rate expected to reach 70 per cent by the end of 2022 and to reduce to 50 per cent in the first half of 2023 (*Reuters*, 19 July 2022).

A most likely scenario developed during a workshop held by the IFRC and TRC in September 2022 estimated that food prices will increase by an additional 70 per cent during the winter, and that energy prices could rise by at least 50 per cent as the world experiences an energy crisis. A further 90 per cent increase is forecast in accommodation costs over the next six months.

Should this materialize and no additional economic measures be adopted by the government, households' purchasing power and ability to meet basic needs will be stretched to the limits. The increased costs of food, rent and energy expected during the next few months will force households to rely more frequently on negative coping strategies, especially among the 60 per cent of refugee households currently considered to be part of the moderate or high vulnerability groups. This will include borrowing money, reducing portions of food, reducing expenditure on non-food-related needs, relocating to reduce the cost of rent or sharing housing, and withdrawing children from school so they can support the household's economic activities.

Rising inflation will have a stronger impact on the living standards of non-Syrian refugees. Indeed, Syrian refugees are under temporary protection, allowing them to access some basic services for free (e.g., health and education). However, this is not the case for other nationalities (Iraqis, Afghans, etc.) who live under international protection and need to pay for services. Humanitarian access is expected to remain stable and without major challenges or barriers over the next year.

PRIORITY NEEDS

Housing, food and energy were overwhelmingly identified as priority issues across the five assessed regions. The ranking has changed compared with IVS-1, where food was ranked in third place after housing and energy, indicating that food commodities are of greater concern this year. These results seem logical as, expenditure for these three items together accounts for 64 per cent of households' monthly expenditure.

Prices of food and energy are expected to increase significantly during the winter, and housing costs will also increase in the coming six months, as soon as current renting contracts end. This will probably result in heightened expenditure and increased needs for most households.
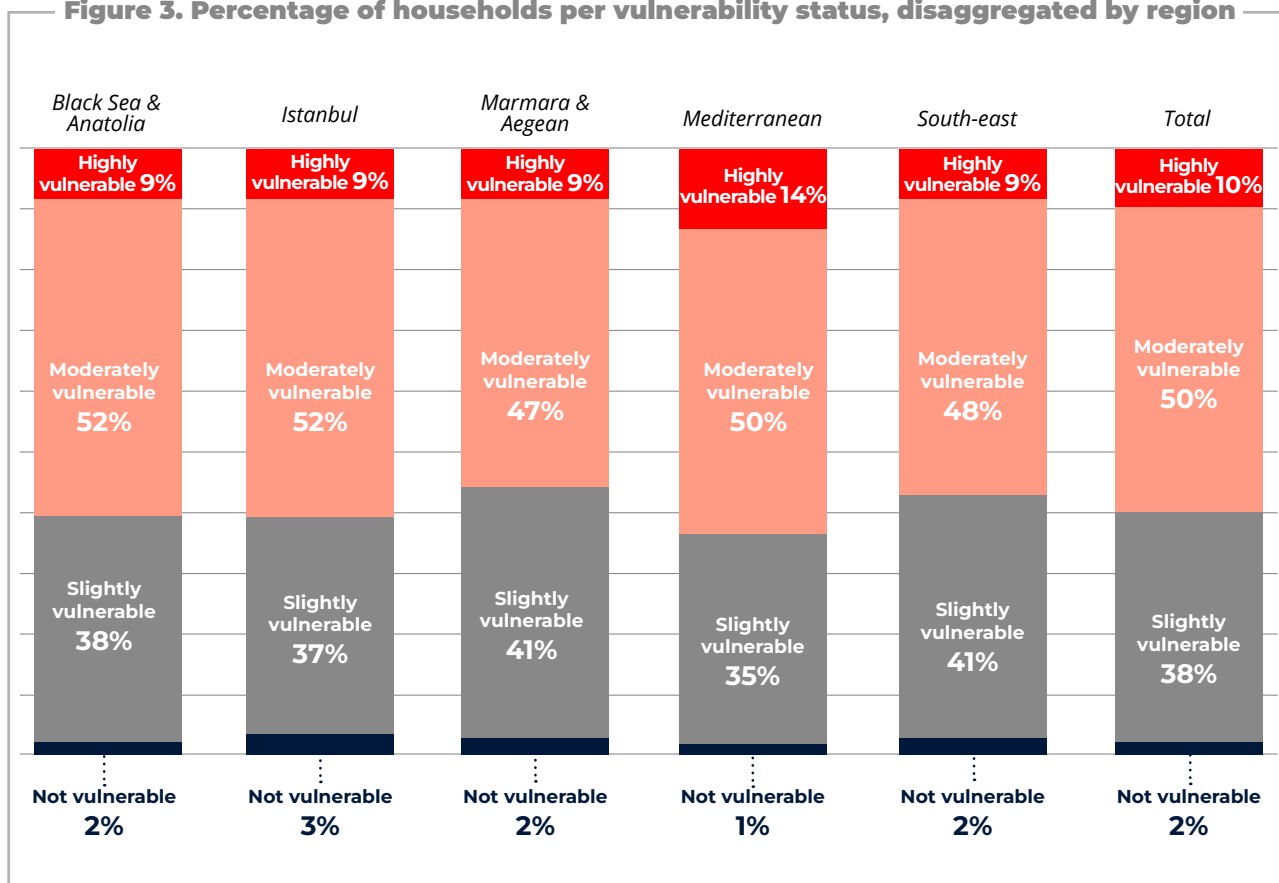
Cash assistance continues to be preferred by households, as it enables them to cover their main expenditure. This finding is coherent in a situation where income level is the main driver of humanitarian conditions and vulnerability.

PRIORITY GEOGRAPHICAL AREAS

Vulnerability and humanitarian conditions are relatively homogeneous across the entire country.[6] While significant differences are recorded in income, debt or expenditure levels across regions, the overall vulnerability distribution is similar across geographical areas, suggesting that a holistic cash response focused on alleviating the cost burden of the five most basic needs could have a positive impact on the needs of refugee households (Figure 3).
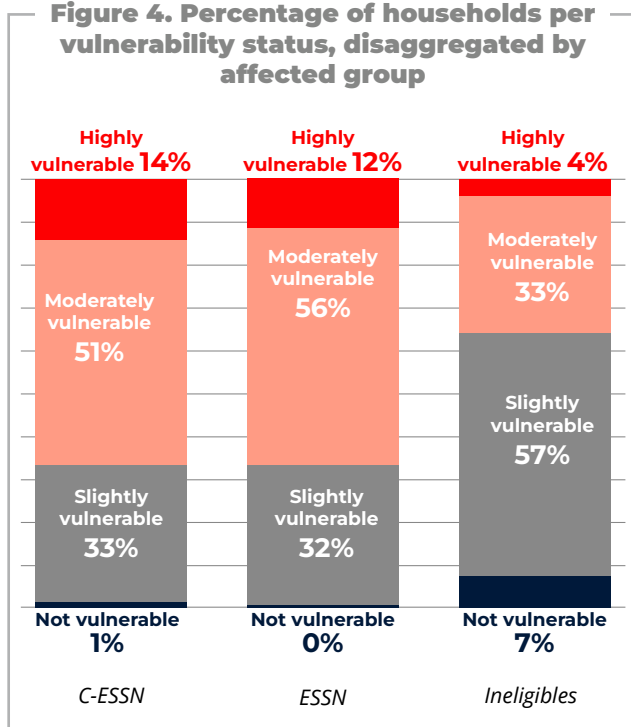
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6 • The IVS methodology categorizes household severity using five severity classes: normal, stressed, moderate, severe and critical (see definitions in Annex 2). Households falling in the moderate, severe and critical categories are considered in need of additional humanitarian assistance.

Figure 3. Percentage of households per vulnerability status, disaggregated by region

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Highly vulnerable	9%	9%	9%	14%	9%	10%
Moderately vulnerable	52%	52%	47%	50%	48%	50%
Slightly vulnerable	38%	37%	41%	35%	41%	38%
Not vulnerable	2%	3%	2%	1%	2%	2%

MOST VULNERABLE HOUSEHOLDS

Figure 4. Percentage of households per vulnerability status, disaggregated by affected group

	C-ESSN	ESSN	Ineligibles
Highly vulnerable	14%	12%	4%
Moderately vulnerable	51%	56%	33%
Slightly vulnerable	33%	32%	57%
Not vulnerable	1%	0%	7%

ESSN recipients show a slightly higher percentage of moderate and highly vulnerable households (68 per cent) compared with C-ESSN recipients (65 per cent) and ineligibles (37 per cent) (Figure 4). This is likely due to the additional assistance provided to the C-ESSN households. However, the cash top-ups provided in June 2022 to both ESSN and C-ESSN recipients to counter the effects of inflation may have already dissipated these minor differences.

The vulnerability status of refugees in Türkiye is clearly correlated with the number of children per household and, to a lesser extent, to the number of female members in the household. In other words, vulnerability status is highly dependent on the income-earning capacity of refugee households and the number of working-age members, especially male members.

2. BACKGROUND INFORMATION

IVS OBJECTIVES

The Intersectoral Vulnerability Study (IVS) is an integral part of the Emergency Social Safety Net (ESSN) programme funded by the European Union's ECHO Operations to support refugees in Türkiye. The TRC and the IFRC developed and conducted the study to provide annual results on unmet basic needs and how they evolve over time, across refugee groups and geographical areas. This is the second time the IVS has been conducted in Türkiye. The specific objectives are identical to those of IVS-1 and include:

- establishing the key priorities and severity of humanitarian conditions, at an intersectoral level, across different refugee groups (eligible and ineligible) living in different regions of Türkiye

- identifying further information needs, i.e., locations, sectors and/or affected groups requiring more in-depth assessments

- providing the evidence base for improving the efficiency of the ESSN and C-ESSN programmes and accountability to the refugee population.

While the IVS does not inform any specific planning instrument, it contributes to strategic discussions on trends, targeting and the future orientations of the ESSN programme.

METHODOLOGY

This section describes the main activities, tools and procedures adopted and followed to design, collect, prepare, analyse and report on IVS-2 data and findings. A detailed table describing the main activities and tools used for IVS-2 is available in Annex 1.
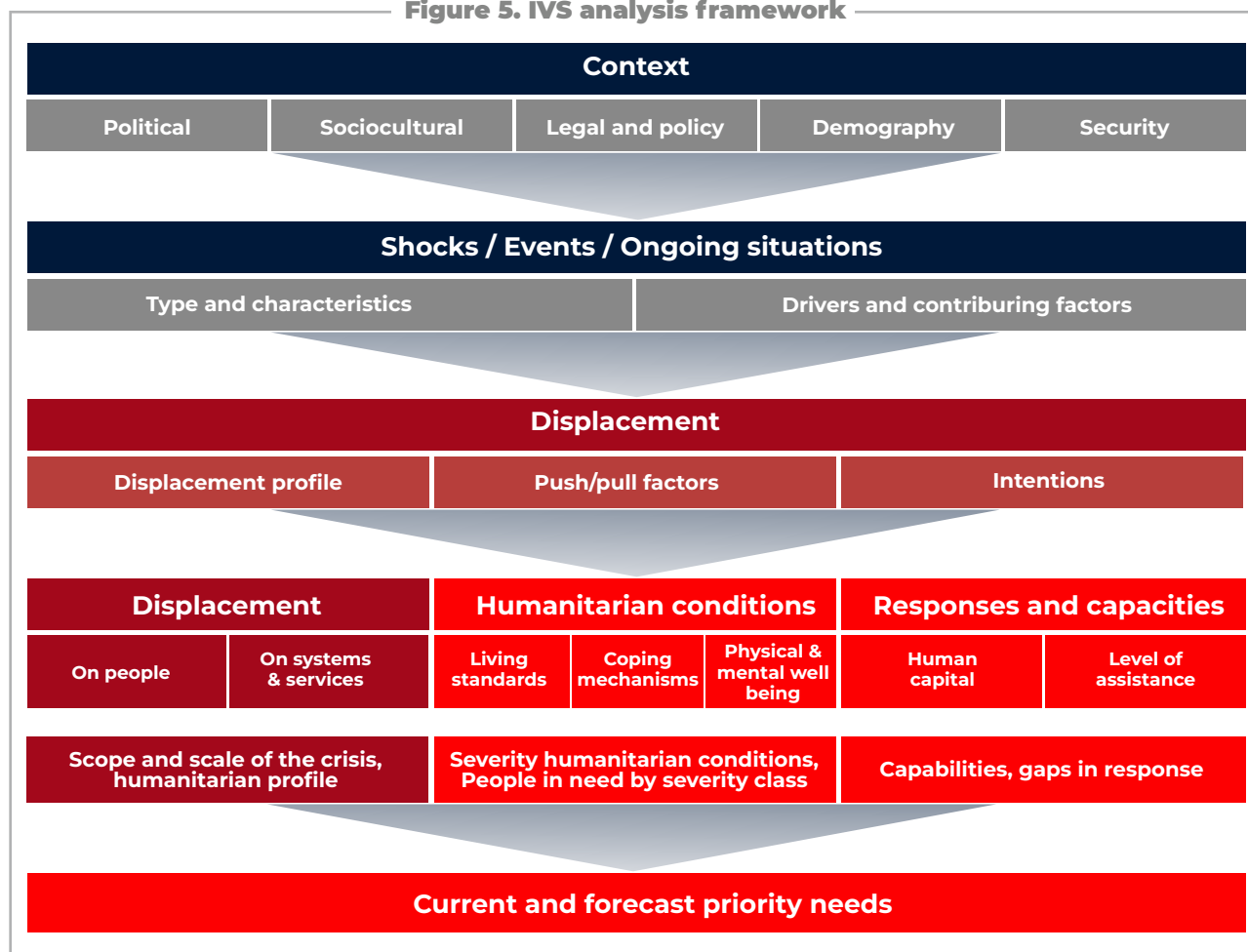
IVS design and planning

The initial IVS survey design was discussed in March 2020 during a joint workshop in Ankara involving the TRC and the IFRC. Technical sector, cross-sector and senior staff members engaged in the selection of the key indicators to measure during the IVS and the subsequent questions to ask the refugee population. The IVS analysis framework and the analysis and data collection plan were revised in April 2020 to adapt to COVID-19 restrictions, and data were collected over the phone. The IVS-1 report was published in April 2021 after six months of data collection.

Building on lessons learned from IVS-1, IVS-2 was designed in October 2021 to be conducted face to face. IVS-2 is based on a comprehensive analytical framework especially tailored to the Turkish context and providing a methodological toolbox guiding data collection and analysis. The framework design was informed by an

in-depth review (2020) of international and regional analytical frameworks aimed at measuring the severity of humanitarian conditions. The IVS analytical framework includes:

- an analysis framework (main dimensions and sub-dimensions of humanitarian conditions being measured) (Figure 5)

- an analysis and data collection plan (how the information is analysed and collected), including a selection of structured analytical techniques (SATs) to mitigate the impact of cognitive biases on the quality of conclusions

- a technical note on the calculation of the severity of humanitarian conditions (how the severity of humanitarian conditions and the vulnerability of each household is estimated)

- a report template (how findings are communicated).

Figure 5. IVS analysis framework

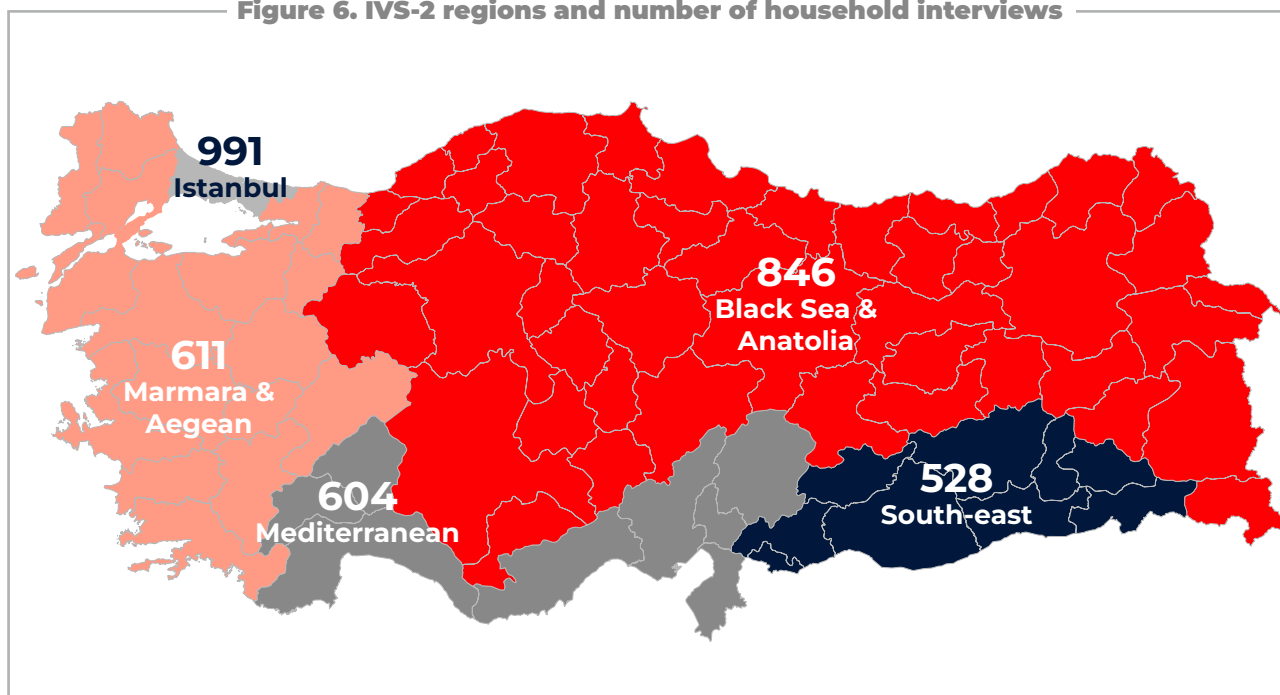| Context				
Political	Sociocultural	Legal and policy	Demography	Security

Shocks / Events / Ongoing situations	
Type and characteristics	Drivers and contriburing factors

Displacement		
Displacement profile	Push/pull factors	Intentions

Displacement		Humanitarian conditions			Responses and capacities	
On people	On systems & services	Living standards	Coping mechanisms	Physical & mental well being	Human capital	Level of assistance
Scope and scale of the crisis, humanitarian profile		Severity humanitarian conditions, People in need by severity class			Capabilities, gaps in response	

Current and forecast priority needs

IVS data collection and collation

To ensure the sample was representative of all applicants (ESSN and C-ESSN), the list of respondents was drawn from the monthly payment list and from the ineligible households list of October 2021. The sum of the two lists stands for the total of applicants.

Building on knowledge obtained from IVS-1 and the known geographical distribution of the refugee population, Türkiye was divided into five regions (instead of the seven in IVS-1), and stratified random sampling was used in each region. The IVS results are representative at the regional level (90 per cent confidence level and 5 per cent margin of error) and at group level (ESSN recipients vs C-ESSN recipients vs ESSN ineligible). Since few regional differences were identified during IVS-1, the number of regions to cover was reduced from seven to five to match those used in the post-distribution monitoring (PDM) exercises conducted on an ongoing basis, and therefore allow for the comparison of results.

The questionnaire was piloted, revised, translated and made available in Turkish, Arabic and English, tested and revised again. Some questions (for instance, the measure of the psychosocial stress of the heads of households) were discarded during this process as culturally insensitive. An open section was added at the end of the interview to allow respondents to cover topics not addressed in the questionnaire and the analysis framework. To avoid influencing future survey results, the questionnaire used for IVS-2 is not public.

Data were collected between December 2021 and July 2022. The TRC was responsible for the data collection process with the endorsement of local authorities. Households, who were randomly selected, were first contacted by phone to confirm their presence, to explain the study objectives, gather consent to participate and plan for a visit at a convenient time. Out of 7,808 households contacted, 3,744 agreed to participate, of which 3,580 were interviewed face to face by teams of two or three enumerators (Figure 6).

Figure 6. IVS-2 regions and number of household interviews

991 Istanbul

611 Marmara & Aegean

604 Mediterranean

846 Black Sea & Anatolia

528 South-east

Secondary data analysis

PDM data collected on an ongoing basis include similar questions to those used in IVS-1 and IVS-2 for debt, income, expenditure and coping mechanisms, offering great opportunities for the analysis of trends over recent years. The Data Entry & Exploration Platform (DEEP) ESSN project and the expertise of its managers were also used to identify the relevant secondary data from different sources (government, UN agencies, research institutes, non-governmental organizations/ NGOs, etc.), triangulate with IVS-2 data, and inform the pillars of the analysis framework that were not covered by field data collection (e.g., contextual, economic and sociocultural impact on people). All secondary data used are cited in this IVS report.

Respondent protection, data protection and study ethics

Data protection measures were implemented to ensure the anonymity of respondents. Only unique household identifiers were registered in the open data kit (ODK), and personal data were not collected in the questionnaire. Moreover, access to collected data was restricted to the TRC desk office. Thirty-one enumerators of different age groups, genders and backgrounds were tasked to conduct the interviews at the household level. Households' cultural preferences were taken into account when choosing the gender and age of enumerators: one male and one female were always paired together to adapt to households' preferences. Enumerators with knowledge of Persian, Arabic and Turkish were also chosen to avoid the use of interpreters. Enumerators were trained to conduct the questionnaire during a five-day workshop where survey objectives, questions, humanitarian principles, referral, safety and security procedures, as well as specific data protection issues, were reviewed.

Being one of the core principles of the TRC, do no harm training was specifically held for enumerators and team leaders. Only individuals above 18 years of age were interviewed, and it was requested that children not be present during interviews. When this was not possible, enumerators were instructed to pay additional attention to children's sensitivity during interviews. Measures to prevent and address sexual harassment during the assessment were established, notably through enumerators' training and with systematic feedback from the households interviewed over the phone. Explaining the study objectives to the respondents made it clear that the results would not influence the level of assistance they would receive. Figure 7 summarizes the sample characteristics.

Figure 7. IVS-2 sample characteristics

SAMPLE AND BENEFICIARY STATUS: 3,580 households were surveyed in five regions between December 2021 and July 2022. In total, IVS-2 identified humanitarian conditions for a cumulative total of 20,729 people. 1,525 households were beneficiaries of the ESSN programme, and 541 households of the C-ESSN programme, and 1,514 were ineligible for cash assistance.

RESPONDENTS' GENDER: 1,935 female and 1,645 male respondents were interviewed face to face. All provided informed consent before taking the survey and understood the objectives and use of the data. The average age was 37 for female respondents and 43 for male respondents.

REFUGEES' NATIONALITIES: Ten different refugee nationalities were covered by the survey; however 94% of the sample is composed of Syrian and Iraqi refugees. Syrians are a large part of the sample in Istanbul (99%), Marmara and Aegean (90%), Mediterranean (99%) and South-east regions (100%), while Iraqis, Afghans and Iranians are more present in the Black Sea and Anatolia region (39%) and in the Marmara and Aegean region (10%).

FAMILY SIZE AND MARITAL STATUS: The average size for Iraqi families is 6.6 members, compared with 5.8 for Syrians and 5.2 for Afghans. Family size is generally larger for ESSN-eligible families, with an average of 6.6 members compared with 5.1 for ineligible families. Only 6% of households have fewer than three members, and 7.5% more than nine. 92% of household heads are married, 4% are widowed and 3% are single. 1% are divorced and less than 1% are separated. There are no significant differences by region; however, the proportion of widowed members is higher in the C-ESSN group (12% compared with 2% to 3% in other groups), and the proportion of single people is higher in the ineligible group (6% compared with 2% to 3% in other groups). These findings are logical since the number of dependants and other demographic dimensions are part of the criteria for selecting eligible households.

PEOPLE WITH SPECIFIC NEEDS: 10% of the population surveyed are reported as being chronically ill (against 6% last year) without medical report and 3% with medical report. Similar to last year's results, 23% of the female adults are pregnant or lactating (6% of the total population) and 11 cases of pregnant or lactating minors were also recorded. Less than 1% are older people with support needs. IVS-2 also identified 108 separated children and 23 unaccompanied children, nearly half of whom were in Istanbul, a slight decrease compared with last year.

DEMOGRAPHY: 50% of the population surveyed are male and 50% female. The demographic characteristics of the IVS sampled households are generally identical to data collected in other refugee surveys in Türkiye, though usually the proportion of males is slightly higher. 30% of the total population surveyed are school-age children (6–17 years old) and 51% are children (younger than 18) (Figure 8). The highest proportions of older people (aged 60 and above) are found in the Mediterranean and Istanbul regions.

LEVEL OF TURKISH: Only 48% of individuals interviewed speak intermediate- to advanced-level Turkish. The percentage is particularly low in the Mediterranean and South-east regions (32% in both) compared with other regions where the proportion of members with a good level of Turkish is between 42% and 45% (Figure 9). 60% of the population aged 6 to 17 speak intermediate to advanced Turkish, compared with only 39% of adult refugees, most likely due to more active language learning at school and more frequent social interactions with Turkish friends.
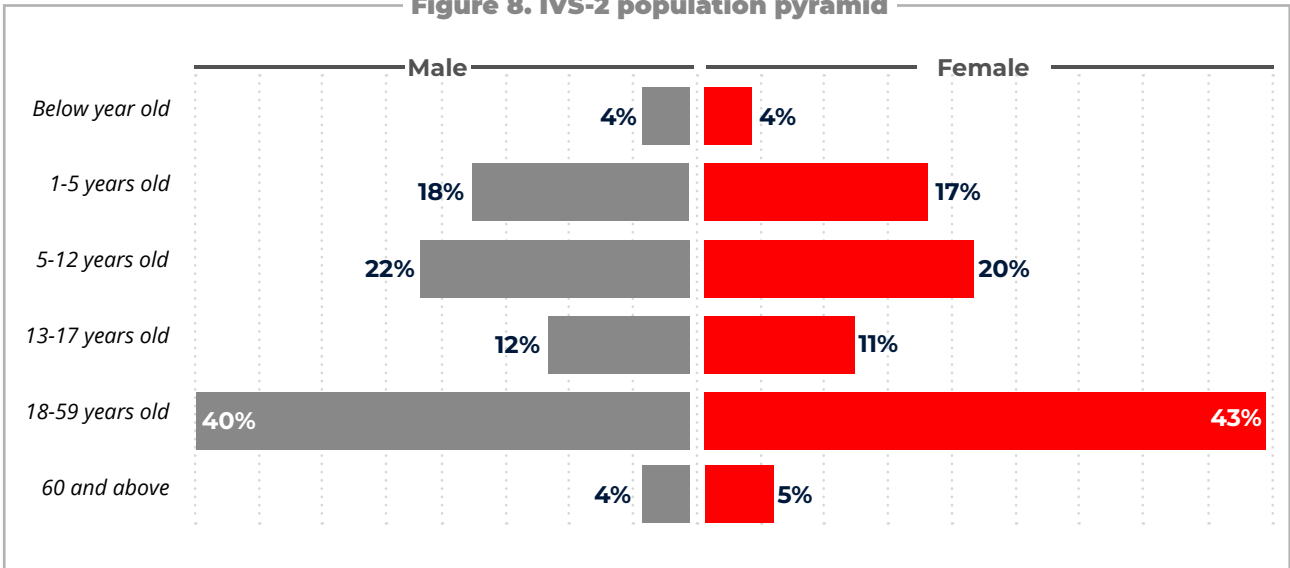
Figure 8. IVS-2 population pyramid

	Male	Female
Below year old	4%	4%
1-5 years old	18%	17%
5-12 years old	22%	20%
13-17 years old	12%	11%
18-59 years old	40%	43%
60 and above	4%	5%

Figure 9. Percentage of household members older than 6 years speaking intermediate or advanced Turkish

Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east
42%	45%	44%	32%	32%
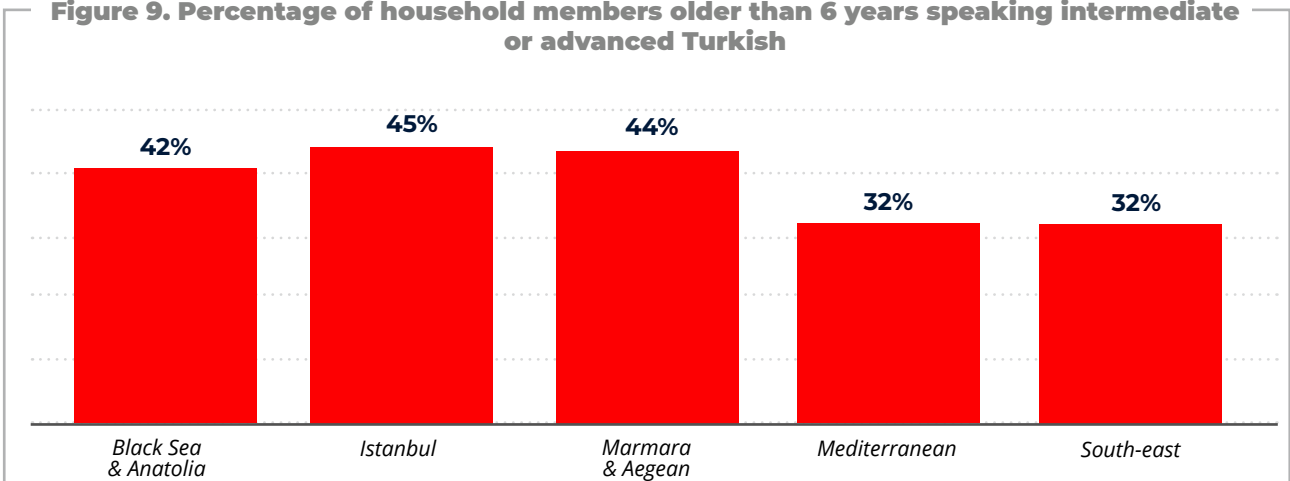
Figure 9. Percentage of household members, disaggregated by age and Turkish language level

6 to 17 years old

Don't speak any Turkish	Basic	Intermadiate	Advanced
17%	23%	33%	27%

Over 18 years old

Don't speak any Turkish	Basic	Intermadiate	Advanced
31%	30%	21%	15%
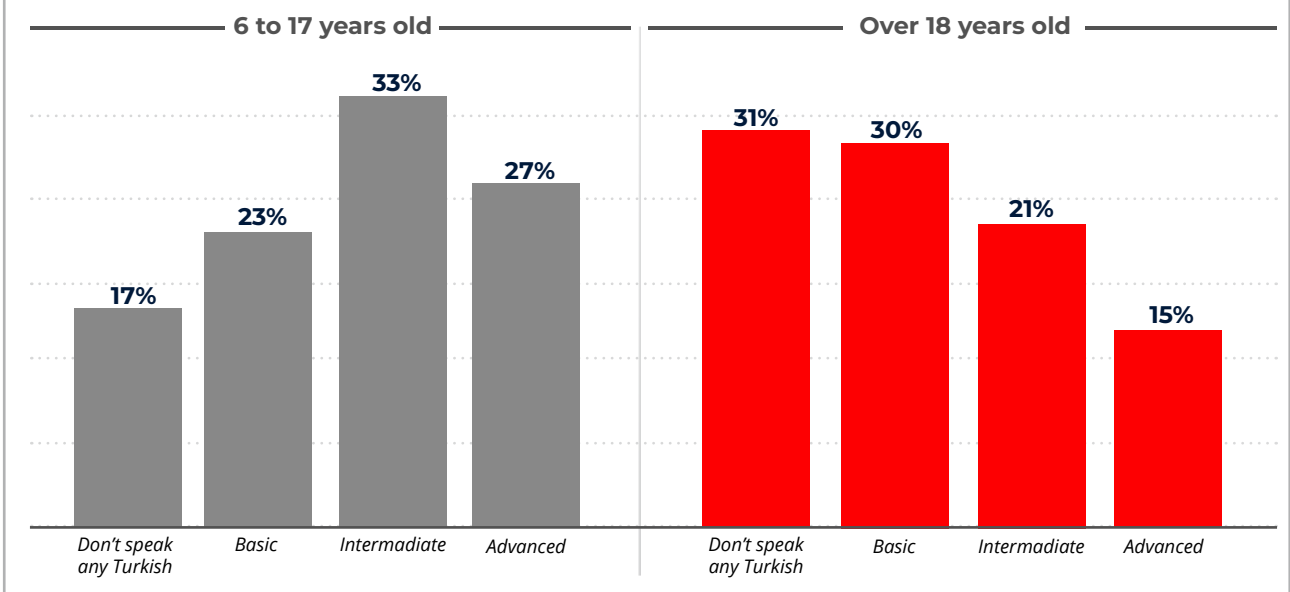
Preparation and exploration

In total 101 records were discarded from the IVS-2 dataset due to inconsistencies, missing values in critical areas and errors. The final usable sample amounts to 3,580 households. Data preparation included building the severity index (see technical notes in Annex 2), identifying weights, creating new variables (below/above the minimum expenditure basket/MEB, percentage share of total expenditure, coping strategies scores, etc.) and various data quality checks. The final dataset was ready for use at the beginning of September 2022. Exploratory graphs were generated for each variable of the survey, and correlations were run to identify the main associated variables. Initial review of the severity results showed the absence of critical cases and a very limited number of severe cases. To compensate for the loss of two classes, it was decided to normalize the severity classification to obtain a ranking (non-vulnerable, and slightly, moderately or highly vulnerable) instead of a rating (normal, stressed, moderate, severe, critical). The severity classification was used only to compare results with IVS-1, and all other IVS-2 results are based on the vulnerability classification. Initial analysis revealed limited differences between geographical areas, but there were sufficient disparities to not totally discard these regional comparisons. It was decided to focus the analysis on differences between geographical areas, affected groups (ESSN, C-ESSN and ineligibles) and vulnerability classes. The report template and the problem tree template were also revised in early September. Ten technical staff members, including analysts, monitoring and evaluation officers, statisticians and secondary data officers, worked on this phase.

Analysis and sense making

A core team of seven social researchers and assessment and analysis experts conducted the analysis, using different statistical and data processing packages (R, Python, SPSS, Stata, Excel). Survey results, risks and future scenarios were discussed during a one-day joint analysis workshop (14 September 2022) involving TRC and IFRC technical staff, where key messages were jointly agreed. Analysis included the following for each section of the IVS-2 questionnaire:

- Weighted summary statistics and comparisons between geographical areas, recipients, vulnerability classes and time (in case past data from IVS-1, PDM or other secondary sources were available). Secondary data review to complement findings. Key analytical statements for each section of the questionnaire.

- Correlation analysis to identify the main drivers and explain results.

- Interpretation and selection of the main findings; consolidation of findings into the IVS problem tree and analysis framework.

- Risk analysis, identification of the main drivers and scenario development.

The IVS-2 analysis followed a rigorous sense-making process based on the IFRC analysis workflow, and covered four levels of the analysis spectrum (description, explanation, interpretation and anticipation). At each step, assumptions and hypotheses to be further tested were identified and then later confirmed or discarded.

The main SATs used to support the analysis were the key assumption checklist, the problem tree for causal analysis and structured brainstorming in joint sessions with technical staff. A specific debriefing with the enumerator team allowed for the filling of some information gaps and the discarding of questions that were not understood properly (e.g., a question on measles vaccination) or where cultural considerations were deemed to challenge the validity of the results. The key messages highlighted in this document's executive summary were refined, using a one-day workshop including IFRC and TRC technical staff.

Communication and dissemination

The IVS-2 report was finalized in mid-October 2022 and validated by the technical team, and by TRC and IFRC senior management. A lessons learned workshop was conducted to identify the main IVS challenges and issues, and to provide practical recommendations to improve the next IVS round (e.g., questionnaire design, sample, analysis and data collection timeframe). Due to protection and sensitivity concerns, IVS-2 data are not public.

While the IVS approach is not a coordinated assessment per se, it was designed to meet the quality criteria established by workstream 5 of the Grand Bargain on Joint and Impartial Needs Assessment (*Inter-Agency Standing Committee*, January 2020). The quality checklist was developed by the Global Public Policy Institute (GPPi) and funded by ECHO. Based on the scoring methodology, the IVS-2 study meets 100 per cent of core requirements and 93 per cent of total requirements. It is rated "best practice".

LIMITATIONS AND MITIGATION STRATEGIES

IVS-2 data were collected over a six-month period and in a dynamic context (inflation, price increases, economic policies, end of the COVID-19 pandemic, etc.), with strong implications for households' income, expenditure and living standards.[7] As results are summarized over the entire period of data collection, some important trends such as inflation and exchange rates are lost in the aggregation. When available, secondary data and past assessments, such as the PDM exercises, have been used to highlight key differences and important findings.

The sampling strategy followed a two-step approach: first, provinces with the highest concentration of refugees were selected; then, households in each chosen province were selected randomly. This is not a truly representative sample since the first step was purposive. However, the design ensured that the provinces selected for the survey included more than 90 per cent of the total number of refugees located in the region, thus limiting the design bias. Nonetheless, the results obtained from the Mediterranean region seem to indicate a higher level of vulnerability. Further inspection revealed that half of the sample in this region was drawn from the city of Hatay, one of the cities with the highest refugee density in the country and where the situation is particularly difficult, thereby skewing the results for the entire region towards higher vulnerability levels. Regional differences should be assessed in this light.

Compared with IVS-1, IVS-2 relies more systematically and rigorously on the secondary data available to compare and triangulate results. However, limited information was available on the socioeconomic impacts of the COVID-19 pandemic, especially in the current fast-changing environment.

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7 • See key findings section on context below for more details.

3. KEY FINDINGS

CONTEXT

Economy

Despite the impact of the COVID-19 pandemic, the country has experienced economic growth since 2021, boosted by policy measures adopted by the government and compromised by the depreciation of the Turkish lira. However, this devaluation, coupled with the impact of the conflict in Ukraine, means the economy remains subject to high levels of inflation with a risk of hyperinflation, with a sharp increase in the prices of most basic goods and services. In 2020, Türkiye managed to contain the spread of the COVID-19 pandemic by implementing strong public health restrictions and measures (curfews, lockdowns, closure of businesses, schools, etc.). After an economic halt, the policy measures adopted by the government – including liquidity flexibility for banks, uninterrupted credit flow, rediscount credits and a liquidity boost on the government domestic debt securities market – led to a sharp return of economic activity in the second half of 2020, resulting in an 11 per cent GPD increase in 2021. This was partly due to a rise in exports driven by the disruption of supply chains in Asia and by the lira's depreciation. Indeed, the lira started to lose value by the end of 2020 and has lost about half its value against the US dollar in the last two years, with a 27 per cent decrease in 2022 alone (*World Bank*, 2021; *OECD*, 2022).

In parallel, domestic demand has also increased, mainly due to facilitated credit capacity and two increases in the minimum wage (50 per cent in December 2021 and 30 per cent in July 2022). While 2.3 million jobs had been lost by December 2020 (the service sector being the most affected), the unemployment rate fell back from 13.7 per cent in 2019 to 10.6 per cent in 2022. However, the resuming of economic activities was accompanied by rising inflation, exceeding 80 per cent for the year to August 2022, the highest rate experienced in the country since 1998. The ongoing conflict in Ukraine also impacted the Turkish economy, notably via external demand and commodity prices. Türkiye is heavily dependent on imported oil and gas and previously imported nearly half of its gas and 30 per cent of its oil from Russia. Gas imports from Russia are not expected to be disrupted in the coming months; however, due to the lira's depreciation, prices are rising for households and companies. Likewise, more than 70 per cent of imported grains came from Russia and Ukraine. The tourism sector is also suffering from the conflict, as Russians and Ukrainians accounted for 15 per cent of overall tourism (*Al Arabiya*, 2022; *TurkStat*).

These combined factors have led to an increase in commodity prices since November 2021, with a 116 per cent increase in the food basket cost between June 2021 and June 2022, rising from TRY 196 to TRY 423 (*WFP*, 23 August 2022). By September, the annual food inflation rate had reached 95 per cent. Electricity and natural gas prices rose by 54 per cent between January and June 2022. Rental costs have also increased, with a year-to-year increase of 112 per cent in Istanbul by March 2022, and residential property prices had increasing by 61 per cent by April. Transportation has been the most impacted sector this year, with a 106 per cent increase by April according to the Consumer Price Index. Fuel prices have seen a 248 per cent annual increase in Ankara to September 2022, with similar trends across the country (*OPET*; *TurkStat*, April 2022; *TurkStat*, June 2022). As the Turkish government has begun to scale down its economic measures, the OECD expects economic growth to be moderate in the next two years and households' purchasing power to be limited (*TurkStat*; *Reuters*, 5 September 2022; *Reuters*, 1 September 2022; *WFP*, August 2022; *Reuters*, 1 August 2022; *TCMB*, September 2022).

The currency crisis is also perceived as the main threat by Syrian businesses interviewed by Building Markets, with 65 per cent of businesses responding that inflation has a greater impact on their business than the pandemic. This is mostly due to the prices and availability of products, as well as to supply chain constraints and demand reductions (*Building Markets*, June 2022).

Politics

As general elections are approaching, anti-migrant rhetoric is being amplified by opposition parties. The next general elections are set for June 2023, including both presidential and parliamentary elections. While the government of Türkiye has adopted a protective and humanitarian approach towards refugees entering the country since 2011 – notably through funds allocations and a range of policies (allowing the provision of accommodation in camps for the first two years, including children in schools, work permits for refugees, etc.) – in recent years, opposition political parties have been pleading for the repatriation of refugees to their countries of origin. In the run-up to the elections, anti-migrant rhetoric is intensifying, driven both by opposition political parties and by media outlets (*Tahiroglu*, 2022; *T24*, 3 May 2022; *Hurriyet*, 12 August 2021; *Erdoğan*, 2020).

Settlement and immigration policies

To reduce the influx of migrants and refugees, the country has been adopting regulations and increasing deportation and voluntary repatriation. In February 2022, the government announced that refugees would not be allowed to settle in areas in which foreigners comprise more than 25 per cent of the local population. This particularly affects Syrians, who account for more than 90 per cent of the total refugee population in Türkiye. In areas where this rate is already overrun, Syrians have to relocate voluntarily. Areas have already been closed to refugee settlement in 16 provinces, including in major cities such as Ankara, Istanbul and İzmir. On 1 July, the government lowered the quota to 20 per cent, preventing residence permits from being issued in 1,200 neighbourhoods across the country. This policy was implemented after the riots that took place in Ankara in August 2021 amid tensions between Syrian refugees and the Turkish community (*Foreigner Residence Services*; *InfoMigrants*, 13 June 2022; *Middle East Monitor*, 24 February 2022).

To reduce immigration, additional regulations for Syrian refugees were adopted by the Turkish government, restricting them from travelling back to Syria for Muslim holidays in May and July, at the risk of losing their protection status. Taxi drivers were also authorized to verify whether the foreigners they transport are allowed to reside legally in the country, so as not to be considered smugglers themselves. Voluntary repatriation and deportation are increasingly implemented by the government. The Ministry of Interior has stated that the deportation rate increased from 11 per cent to 53 per cent in 2021 and that more than 500,000 Syrians have voluntarily returned to Syria. In order to relocate Syrian refugees, new houses are being built by the government in Idlib, across the border in so-called safe areas, with a target of 1 million houses (*Foreigner Residence Services*).

Social cohesion and integration

Refugees perceive that they are well integrated in the country; however, the perception of the Turkish community is slowly shifting from a supportive approach to concerns over the economic impact of the refugee population. Levels of social cohesion between refugees and host communities in Türkiye remain high according to research. Indeed, Syrian refugees report being relatively satisfied with their situation in Türkiye and feeling integrated in the society. In 2020, 86 per cent of Syrians assessed by Syrians Barometer (*Erdoğan*, 2021/2022) felt they were close or very close to their host communities; 32 per cent of the respondents agreed that the overall Syrian community was happy in Türkiye; and 91 per cent found that Syrians were partially to completely integrated into Turkish society. The Turkish community's perception of Syrian refugees is slightly more negative, according to this study. Indeed, only 20 per cent of Turkish respondents described their relationship with Syrians as close or very close. Turkish residents' concern that Syrians may harm the country's economy has increased over the past three years of the study, with 72 per cent of the Turkish interviewees agreeing that such concern has increased (*Erdoğan, Syrians Barometer*, 2021/2022; *VOA*, 27 January 2022). Similar findings are reflected in humanitarian studies, demonstrating a change in host communities' attitude towards refugees that would partly be explained by the economic slowdown since 2018. A secondary data review led for the ESSN programme in 2022 shows that misconceptions about the impact of refugees on the country are the main factors leading to the Turkish community's concerns about refugees, particularly in relation to the potential loss of identity, the impact on the labour market, the deterioration of public services and the increase in crime. Available research has shown that the correlation between job losses and the arrival of refugees remains limited, while Ministry of Foreign Affairs statistics show that the presence of refugees has no discernible impact on crime rates. Actual tensions between communities remain sporadic, but the media and political discourse has been turning towards an anti-migrant narrative since 2016, reinforcing the Turkish population's concerns about the impact of refugees (*ESSN*, May 2022; *TRC and WFP*, 2019).

Language and work regulations are the main challenges limiting refugees' integration. According to the 2020 Syrians Barometer, 31 per cent of Syrian interviewees have little or no knowledge of the Turkish language (*Erdoğan*, 2021/2022). This restricts their access to basic services such as healthcare and protection services, which frequently lack interpreters, especially non-Arabic translators. It also limits their access to education in schools and universities (*ESSN*, May 2022; *Gümüs et al.*, May 2020). According to the last round of the Comprehensive Vulnerability Monitoring Exercise published by the World Food Programme (WFP) in January 2020, gender and age played an important role in the participants' ability to

acquire a command of the Turkish language; young people were more likely to have basic, intermediate or proficient levels (about 75 per cent of them, vs 67 per cent of adult men and 36 per cent of adult women) (*WFP*, January 2020). Both language skills and national regulations limit access to formal employment for refugees. Research shows that refugee women are less likely to work, partly because of a lack of childcare, a lack of information and training, or family pressure. This limited access to livelihoods reduces people's integration with Turkish society (*Asylum Information Database/ AIDA*, May 2021; *WFP*, January 2020). Informal work arrangements are prevalent among Syrian refugees, with the majority working without being registered with Türkiye's social security institution. A quota system dictates that the number of individuals under temporary protection in a workplace cannot exceed the number of Turkish workers by more than 10 per cent, while it is 5 per cent for non-Syrian foreigners (*Watan and International Blue Crescent*, December July 2020; *ILO*, February 2020).
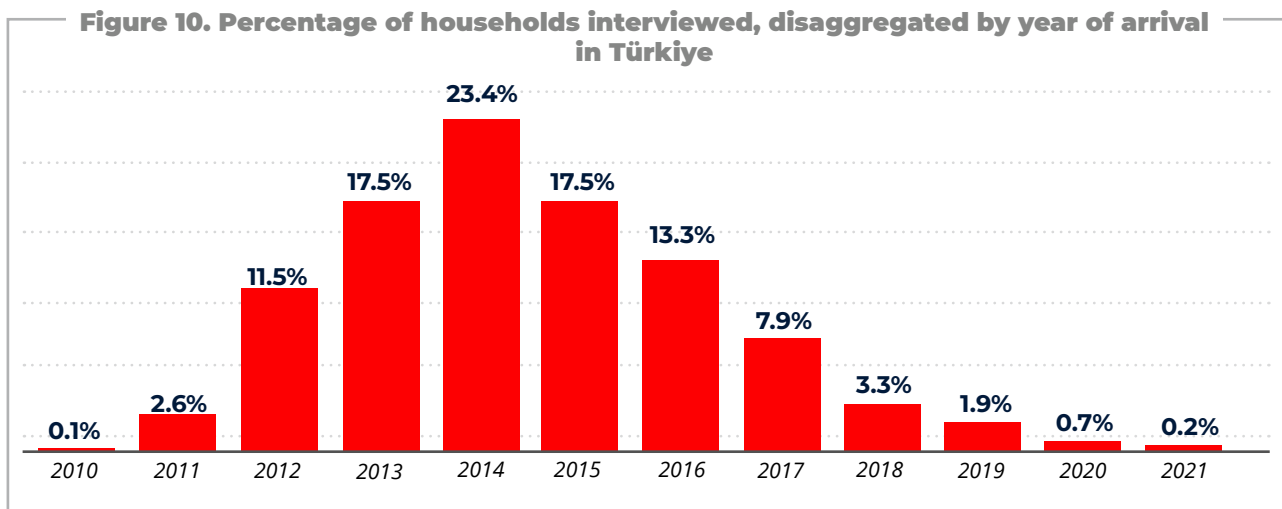
REFUGEE MOVEMENTS IN TÜRKIYE AND INTENTIONS

- Nine out of ten refugee households in Türkiye arrived in the country between 2012 and 2017, after which new arrivals significantly slowed down.

- Most refugee families have relocated at least twice within Türkiye since their arrival, and only 8 per cent have never moved from their first place of residence. Intra-country relocations have accelerated since the end of the COVID-19 pandemic when new residency quotas were adopted by the government. Better housing and living standards and cheaper living conditions are the main reasons for refugee households to relocate in Türkiye. Better social networks are also one of the reasons households have relocated to the Black Sea and Anatolia, and the Marmara and Aegean, regions.

- The date of arrival and number of relocations do not seem to be related to vulnerability status.

- Seventy-two per cent of refugee households intend to integrate in their current location, and only 3 per cent are willing to return to their country of origin, a finding very similar to the IVS finding in 2021.

Refugees' arrival date in Türkiye

Ninety-one per cent of families interviewed arrived in Türkiye between 2012 and 2017 (Figure 10). The date of arrival has no influence on the vulnerability level, contradicting the intuition that the longer refugee households stay in a location, the more they are able to benefit from better local integration and to access income opportunities.

Similarly to the IVS findings in 2021, 75 per cent of households reported that all their members moved to Türkiye together. Afghan and Iraqi families are more likely to have moved together.

Figure 10. Percentage of households interviewed, disaggregated by year of arrival in Türkiye

| Year	Percentage
2010	0.1%
2011	2.6%
2012	11.5%
2013	17.5%
2014	23.4%
2015	17.5%
2016	13.3%
2017	7.9%
2018	3.3%
2019	1.9%
2020	0.7%
2021	0.2%

Twenty-five per cent of households reported that at least one family member came to Türkiye afterwards. About half of them reunited within a year (54 per cent), one-fifth within two years (24 per cent) and 11 per cent within three years. This is similar across regions or affected groups (i.e., ESSN- and C-ESSN-recipient households and ineligible households).

Number of relocations in Türkiye

Of the households who relocated more than once after arriving in Türkiye, more than half have arrived at their current location in the past two years (54 per cent); 29 per cent arrived three to four years ago; and 15 per cent arrived five to seven years ago.

Only 8 per cent of households have never relocated in Türkiye after their arrival, highlighting a significant internal mobility pattern for refugees. This is also an important decrease compared with 2021 (14 per cent), probably caused by recent relocation policies and the end of COVID-19 restrictions. Twenty-five per cent of households have relocated once, and 26 per cent of households have relocated twice (a 6 per cent increase compared with 2021). Similarly to the IVS-1 results, 20 per cent have moved three times and 21 per cent four times or more (Figure 11).

Figure 11. Percentage of households per number of relocations in Türkiye
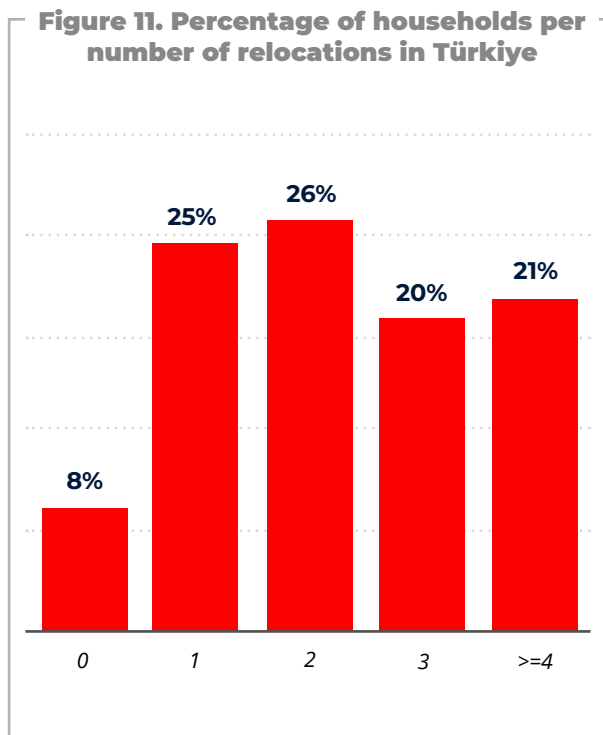
On average, households have relocated 2.5 times since their arrival in Türkiye. Numbers of relocations are similar between regions (between 2.3 and 2.4 on average), except in the Mediterranean region, where the average number of reported relocations rises to 2.9, indicating that the refugee population in this area has relocated more often in Türkiye before arriving in this region, compared with others.

C-ESSN-recipient households, including older population members, are less likely to have relocated several times (2.3 times on average) compared with the ESSN recipients (2.6) or the ineligible (2.4). This could be explained either by reduced mobility capacity due to the presence of older or disabled members or by less ability to afford moving costs due to poor economic conditions.

Highly vulnerable households have relocated slightly more often (2.8 times on average) compared with non-vulnerable households (2.6), but the difference is not strong enough to highlight a clear mobility strategy depending on, or influencing, vulnerability status.
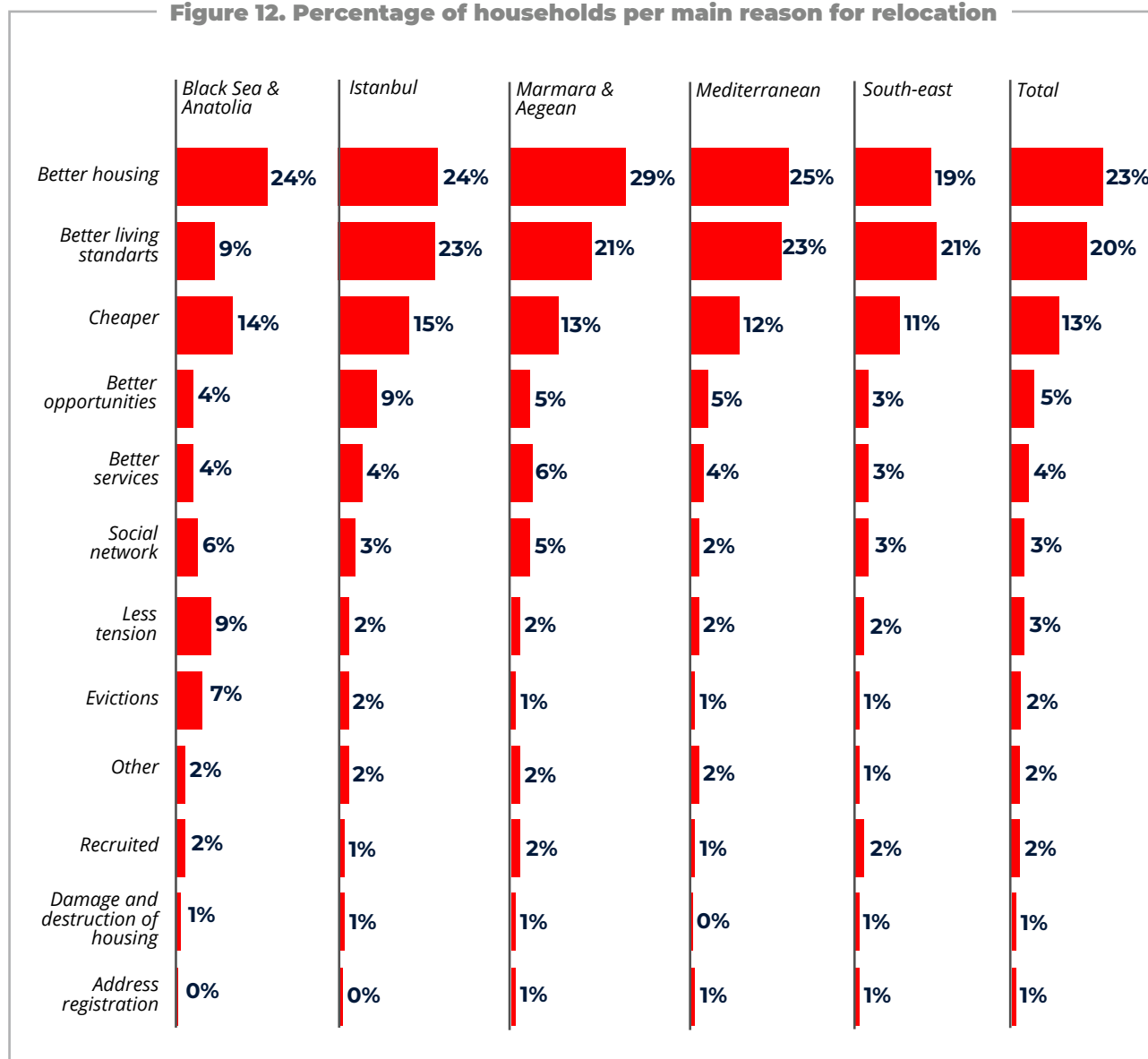
Main reasons to relocate to the current location

Better housing stands as the main reason for refugees to relocate (23 per cent), followed by achieving better living standards (20 per cent) or finding cheaper living conditions (13 per cent). Better living standards appear to be more important for people who have relocated to Istanbul and the Mediterranean region (23 per cent for both regions) compared with other regions such as the Black Sea and Anatolia (9 per cent), where the main reasons, besides better housing (24 per cent), appear to be the cost of living (14 per cent), fewer tensions (9 per cent) and social networks (6 per cent), due to the large community of Iraqis, Iranians and Afghans present. Interestingly, refugee households in the Black Sea and Anatolia region are also those who report having been evicted the most frequently (7 per cent).

Nine per cent of respondents in Istanbul stated they relocated there for better work or income opportunities, the highest rate for all regions. Better living standards are also more frequently mentioned in Istanbul and in the Mediterranean region (23 per cent).

Highly vulnerable households have generally moved to their current location for better housing, and/or better and cheaper living standards, while non-vulnerable households have chosen their location for better housing, living standards and social networks (Figure 12).

Figure 12. Percentage of households per main reason for relocation

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Better housing	24%	24%	29%	25%	19%	23%
Better living standarts	9%	23%	21%	23%	21%	20%
Cheaper	14%	15%	13%	12%	11%	13%
Better opportunities	4%	9%	5%	5%	3%	5%
Better services	4%	4%	6%	4%	3%	4%
Social network	6%	3%	5%	2%	3%	3%
Less tension	9%	2%	2%	2%	2%	3%
Evictions	7%	2%	1%	1%	1%	2%
Other	2%	2%	2%	2%	1%	2%
Recruited	2%	1%	2%	1%	2%	2%
Damage and destruction of housing	1%	1%	1%	0%	1%	1%
Address registration	0%	0%	1%	1%	1%	1%

Intentions

Seventy-two per cent of households interviewed intend to integrate locally within the next 12 months, a finding very similar to that in IVS-1. Surprisingly, the percentage of refugees willing to relocate to other countries has decreased from 20 per cent in 2021 to 15 per cent this year. Similarly to IVS-1, 3 per cent would like to relocate somewhere else in Türkiye, and only 3 per cent seek to return to their country of origin. A large group of indecisive households is also observed (17 per cent) (Figure 13).
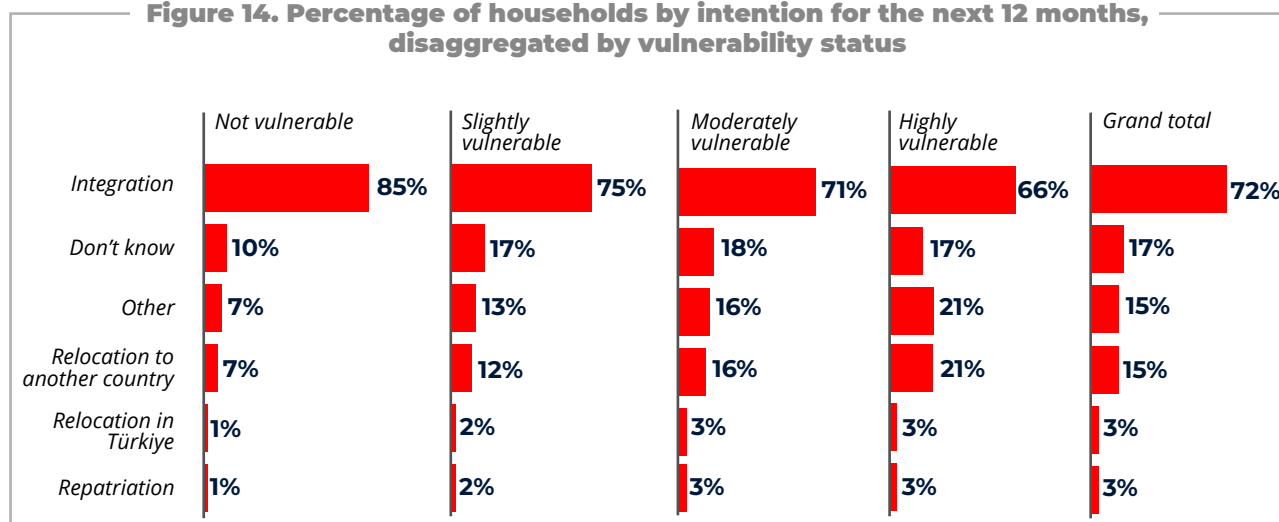
Figure 13. Percentage of households by intention for the next 12 months, disaggregated by region

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Integration	59%	76%	81%	76%	70%	72%
Don't know	26%	20%	16%	12%	16%	17%
Other	16%	18%	13%	15%	14%	15%
Relocation to another country	15%	18%	13%	15%	14%	15%
Relocation in Türkiye	2%	3%	4%	3%	2%	3%
Repatriation	3%	1%	1%	4%	3%	3%
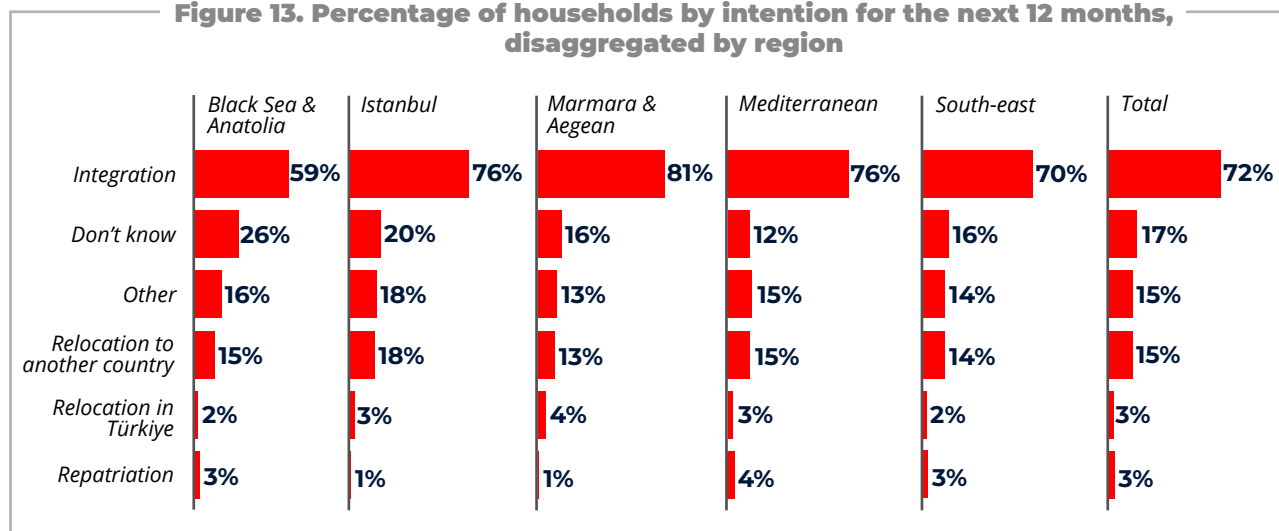
Refugees residing in the Black Sea and Anatolia region (with a larger presence of Iraqi, Afghan, Iranian refugees, etc.) show less willingness to integrate (59 per cent) than those in other regions (between 70 and 81 per cent). Refugees living in Istanbul and in the Marmara and Aegean region are less likely to be willing to be repatriated to their country of origin (1 per cent only of households in both regions compared with 3 to 4 per cent in others). Interestingly, refugees living in the Marmara and Aegean region are those most wanting to integrate (81 per cent) compared with those in other regions, where fewer intend to relocate to other countries (13 per cent) or to repatriate, most likely due to the better income opportunities in these regions.

Highly vulnerable households are less likely to want to integrate locally (66 per cent, against 85 per cent of non-vulnerable) and more likely to intend to relocate to another country (21 per cent compared with 7 per cent of non-vulnerable) (Figure 14).

Figure 14. Percentage of households by intention for the next 12 months, disaggregated by vulnerability status

|	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Grand total
Integration	85%	75%	71%	66%	72%
Don't know	10%	17%	18%	17%	17%
Other	7%	13%	16%	21%	15%
Relocation to another country	7%	12%	16%	21%	15%
Relocation in Türkiye	1%	2%	3%	3%	3%
Repatriation	1%	2%	3%	3%	3%

EDUCATION

- Fewer than 20 per cent of refugee households have a diploma beyond middle school, and this generally low educational level is aggravated by the fact that nearly all refugee households left their country of origin without their diplomas; and for the few who have them, there are difficulties in getting them accredited in Türkiye.

- Education levels and vulnerability status are closely correlated, with nearly half the non-vulnerable having an education level higher than middle school, compared with 11 per cent of highly vulnerable households.

- Sixty-seven per cent of refugee households have school-age children. Following the resumption of the school year, 11 per cent did not send their children back to school, especially in the Mediterranean and Black Sea and Anatolia regions. This coping strategy is used increasingly by the most vulnerable households as a way to increase the number of income earners in their families.

Education level

Overall, only 11 per cent of refugee households have a member with a secondary school diploma, 5 per cent with a bachelor's degree and 3 per cent with vocational training. Six per cent of households have no literate members. In the vast majority of households, the highest diploma is either of primary school (38 per cent) or middle school level (27 per cent). The highest proportion of Illiterates is found in the South-east (10 per cent) and the Black Sea and Anatolia regions (6 per cent). The highest proportion of households with diplomas above middle school is found in the Mediterranean region (23 per cent) and in Istanbul (20 per cent), most likely because large cities offer more opportunities for skilled workers (Figure 15).

Figure 15. Percentage of households by education diploma, disaggregated by region
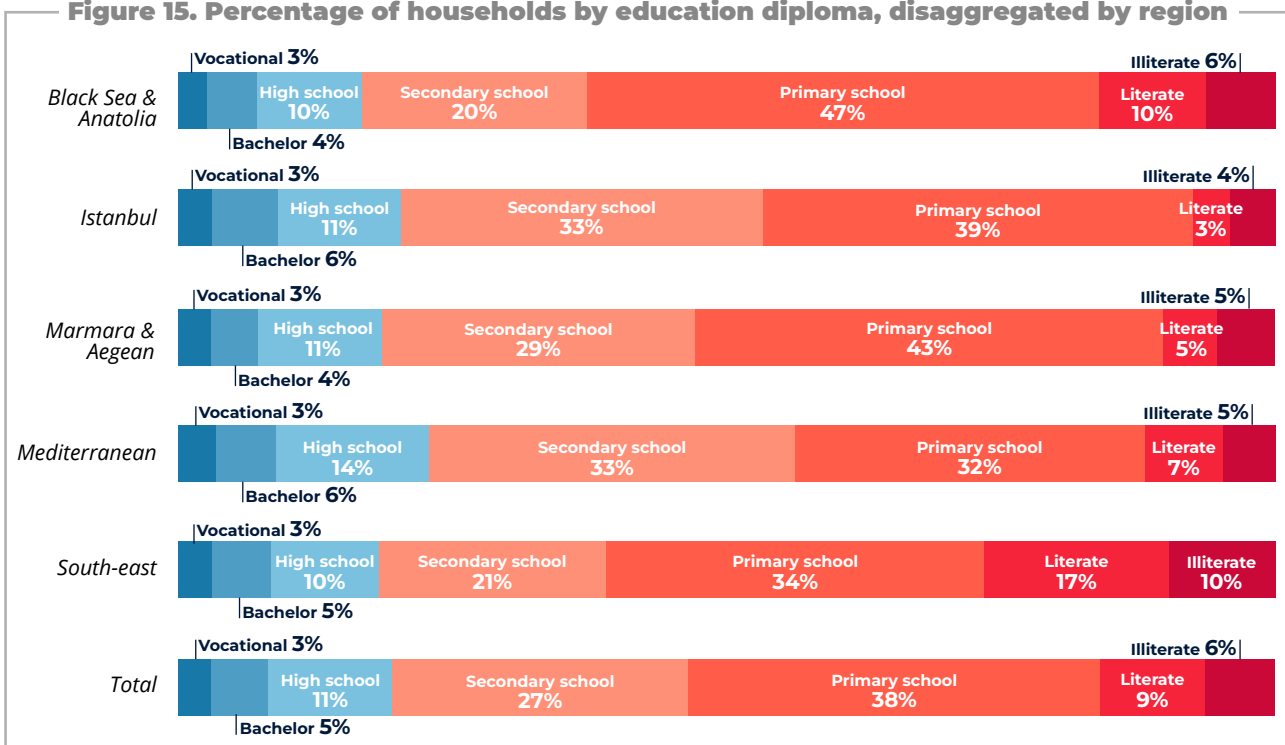
Ineligible households generally have higher education degrees (30 per cent have a diploma higher than middle school), compared with 14 per cent of ESSN households and 22 per cent of C-ESSN households.

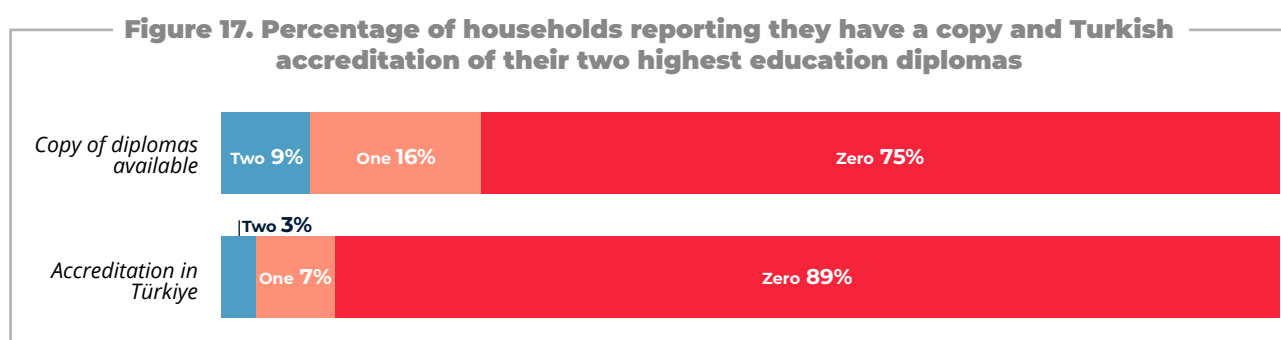Unsurprisingly, the education level is highly correlated with vulnerability status. Only 2 per cent of non-vulnerable households have illiterate members, against 13 per cent of highly vulnerable households, and 45 per cent have an education diploma higher than middle school, against 11 per cent of highly vulnerable households (Figure 16).

Figure 16. Percentage of households by education diploma, disaggregated by vulnerability status
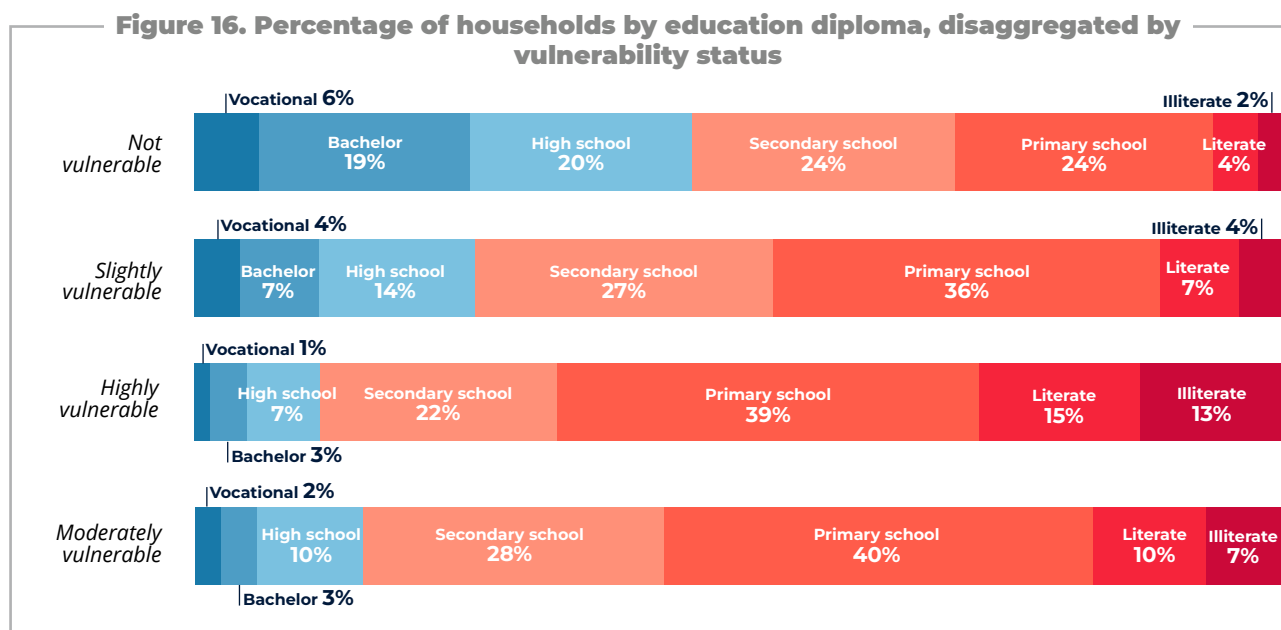
The lack of academic diplomas is aggravated by the fact that most refugees were unable to bring copies of their certificates to Türkiye, and if they did, their situation is aggravated by the complex procedure needed to get them recognized by the Turkish Ministry of Education. When asked about the availability of the two highest diplomas in the household, 75 per cent reported not having their diplomas with them, and only 9 per cent reported they had both of them. Only 3 per cent of refugee households have their diplomas accredited in Türkiye. No significant differences are observed between regions; however, the availability of diplomas and accreditations is higher for the ineligibles and even more so for non-vulnerable households (60 per cent have at least one diploma available, and nearly 25 per cent have at least one accredited) (Figure 17).

Figure 17. Percentage of households reporting they have a copy and Turkish accreditation of their two highest education diplomas

Seventy-one per cent of households have never received or undertaken any specific training since their arrival. Training received includes mostly Turkish language (20 per cent of households who enrolled in training took at least one language training course or session) and vocational training (4 per cent). Non-vulnerable households have more frequently received additional training since their arrival compared with the most vulnerable households, demonstrating additional motivation and willingness to improve their skill levels.

Enrolment since the end of the COVID-19 pandemic

Sixty-seven per cent of households have school-age children. After a long interruption of the school programme due to COVID-19 public health measures, the 2021–2022 school year saw a return to school for all school-age children.

Eleven per cent of all households with school-age children reported they did not send the children back to school, with a higher proportion in the Mediterranean (16 per cent) and the Black Sea and Anatolia regions (12 per cent) compared with other regions (8 to 9 per cent). Both ineligible and eligible groups are affected in the same way. One-fifth of highly vulnerable households did not send their children back to school after COVID-19, compared with 4 per cent of non-vulnerable households. This finding is corroborated by the results available on the coping strategies adopted, indicating that 18 per cent of highly vulnerable households have recently withdrawn their school-age children from school, and 12 per cent have involved them in income-generating activities (Figure 18).

Figure 18. Percentage of households reporting they did not send their children back to school, disaggregated by vulnerability status

Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable
4%	8%	12%	20%
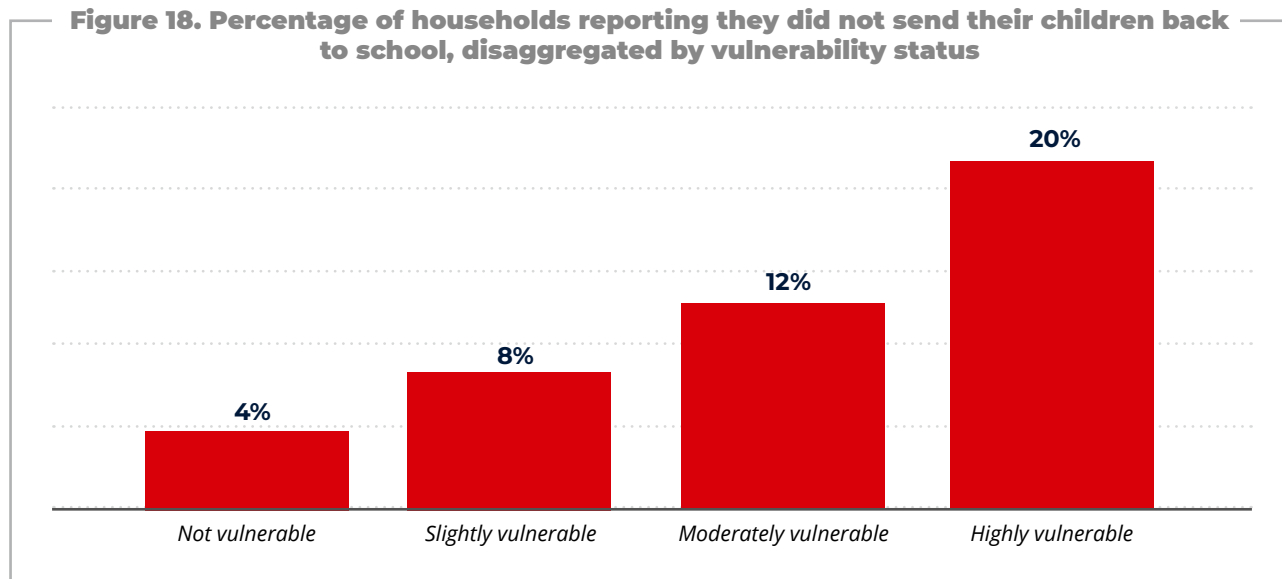
The main reasons for not sending children back to school primarily include using the children to support the household with income-generating activities. Other reasons include the lack of school or the fact that the children are not interested in school. Fewer households mentioned that they were unable to enrol their children, bullying issues or a language problem.

LIVELIHOODS

- Eighty-six per cent of households report that at least one working member generated income in the month preceding the survey. Working members are mostly male adults; however 7 per cent are also children under 18 years of age. C-ESSN recipients generally report fewer working members than other affected groups, due mainly to the smaller number of income earners. IVS-2 results also show that the number of working members in a household, especially males, is negatively correlated with vulnerability.

- Income levels have changed considerably over the last year, with 83 per cent of households declaring their income is better, and the median income (excluding cash assistance) moving up from TRY 1,200 in 2021 to TRY 3,200 in 2022, most likely boosted by the government's two consecutive minimum wage rises and an increased reliance on loans from friends and relatives.

- The main barriers to access to income opportunities include saturation of the job market, a lack of knowledge of the Turkish language, discrimination, health issues and a lack of skills or qualifications.

- Households' debt level is similar to the level registered in IVS-1, with 72 per cent households reporting currently having debts, especially the most vulnerable.

- The most important increase in expenditure is on food commodities, which doubled over the last year. Education expenditure has increased considerably due to the reopening of schools. Energy expenditure is nearly the same as spending on housing rent, and hygiene items expenditure has also risen.

Income earners

Eighty-six per cent of households assessed indicate that one or more of their members worked in the last month, a slight increase compared with the 83 per cent reported in IVS-1, showing that households were able to maintain income-generating activities during COVID-19 and after. Nearly 70 per cent of households have only one working member, a result supported by the PDM findings of July 2022, which indicate that working members are usually male heads of households or sons of legal working age (*ESSN*, 2021/2022).
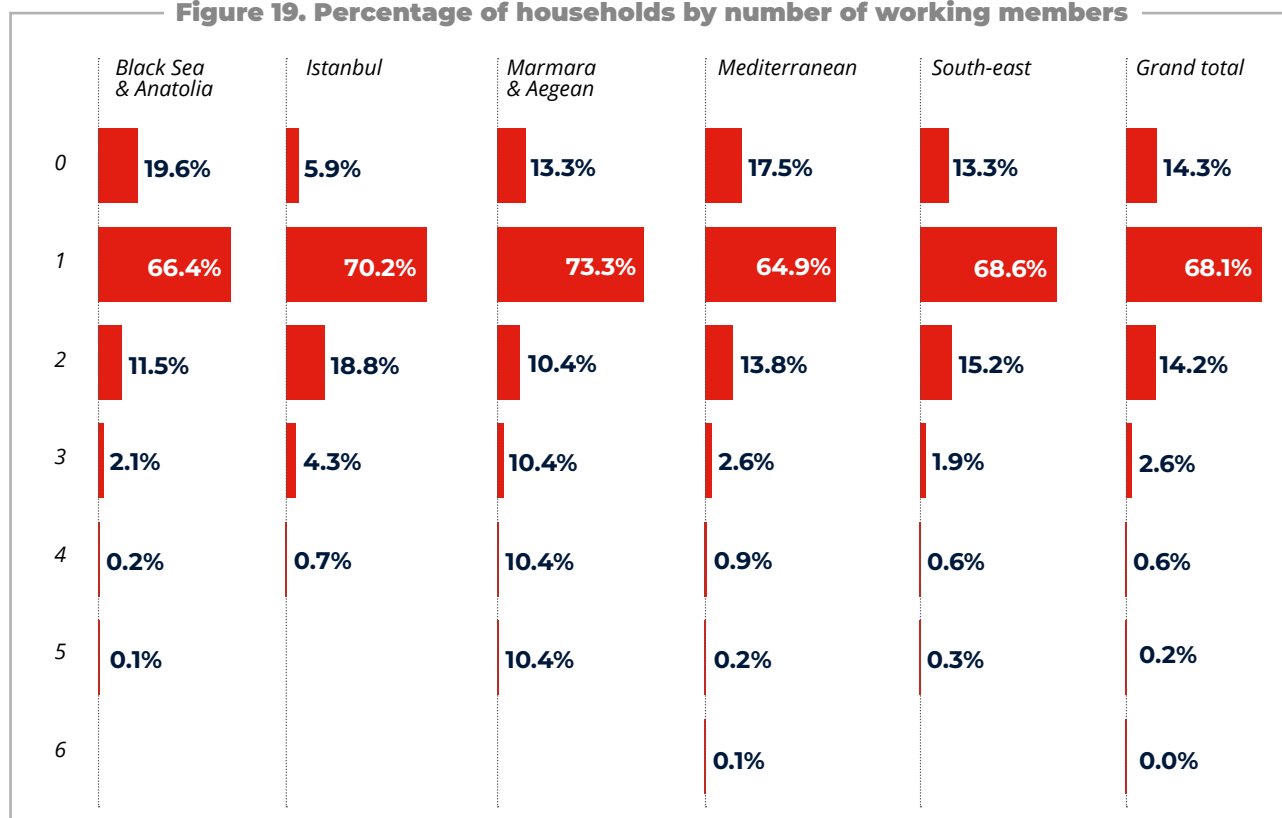
Eighty-seven per cent of working members are aged between 18 and 49, and 6 per cent only are older than 50. Ninety-two per cent of working members are male, although a higher proportion of female workers is found in the South-east region. Seven per cent of working members are under 18 years old, with higher percentages found in Istanbul and south-east Anatolia. This is a slight decrease compared with IVS-1. Although actual figures are not known, it is estimated that many refugee children are at risk of child labour in Türkyie, as close to 40 per cent of the refugee population is under the age of 18 (*UNICEF*, February 2021). The last survey on child labour in 2019 found that 4 per cent of children in the country were working (*TurkStat*; *Fehr and Rijken*, April 2022), indicating that refugee households rely increasingly on child labour to generate livelihoods.

The IVS-2 results further show that 14.2 per cent of households have two members who work, and another 14.3 per cent have none. Only 3 per cent have three or more working members. The Black Sea and Anatolia (19.6 per cent) and Mediterranean (17.5 per cent) regions have the highest percentages of households with no working members. Statistical data from the Turkish government support these findings, as some of the highest unemployment rates in 2021 were found in the Mediterranean (up to 17 per cent) and Black Sea and Anatolia regions (up to 20 per cent) (*TurkStat*, 2021).[8]

Istanbul, on the contrary, is the region with the lowest percentage of households with non-working members (5.9 per cent) and with the highest percentage of households with more than one working member (24 per cent). The 12.3 per cent official unemployment rate in Istanbul has not changed over the last year (*TurkStat*, 2021) (Figure 19).

Figure 19. Percentage of households by number of working members

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Grand total
0	19.6%	5.9%	13.3%	17.5%	13.3%	14.3%
1	66.4%	70.2%	73.3%	64.9%	68.6%	68.1%
2	11.5%	18.8%	10.4%	13.8%	15.2%	14.2%
3	2.1%	4.3%	10.4%	2.6%	1.9%	2.6%
4	0.2%	0.7%	10.4%	0.9%	0.6%	0.6%
5	0.1%		10.4%	0.2%	0.3%	0.2%
6				0.1%		0.0%

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8 • Turkish Institute of Statistics unemployment rate data are given per sub-region and not per region.
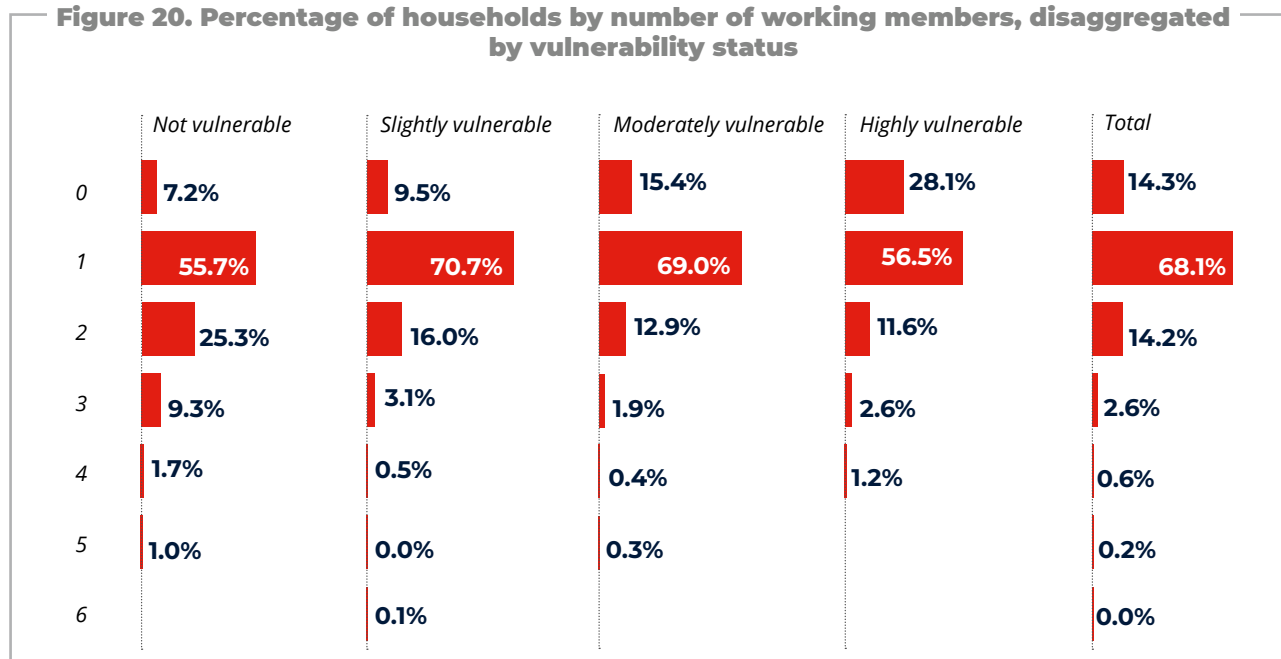
A study by the ILO shows that young people and women suffer from lower employment rates. Findings from 2019 indicate that only 41 per cent of Syrians aged between 18 and 29 were employed, and only 16 per cent of women were employed. Syrian women cite discrimination and lower wages as important barriers. The ILO also reports that young Syrian refugees work on average more hours than the Turkish (59 against 46 hours per week) and are more likely to engage in undeclared work. Fifty-four per cent of interviewees felt mistreated in their job, and among them 22 per cent reported financial abuse (*ILO*, 2022).

An important difference in employment rates and numbers of working members is also observed between recipient groups. Around one-third (31 per cent) of C-ESSN recipients have no working members (compared with 9 per cent and 10 per cent of ESSN recipients and

ineligibles respectively), and 25 per cent of ineligibles have more than one working member (compared with 15 per cent in other groups). This matches the results expected as C-ESSN recipients include the most vulnerable members, which restricts their ability to participate in income-generating activities.

Overall, the number of working members is highly and positively correlated with vulnerability status. Nearly one-third of highly vulnerable households have no working members (28.1 per cent) compared with 7.2 per cent of the non-vulnerable households, who also show a much higher number of working members compared with others. IVS findings generally demonstrate that the higher the number of working members, the greater the likelihood of generating higher income levels, of meeting basic needs and of avoiding the need for severe coping strategies, thus reducing overall vulnerability (Figure 20).

Figure 20. Percentage of households by number of working members, disaggregated by vulnerability status

	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Total
0	7.2%	9.5%	15.4%	28.1%	14.3%
1	55.7%	70.7%	69.0%	56.5%	68.1%
2	25.3%	16.0%	12.9%	11.6%	14.2%
3	9.3%	3.1%	1.9%	2.6%	2.6%
4	1.7%	0.5%	0.4%	1.2%	0.6%
5	1.0%	0.0%	0.3%		0.2%
6		0.1%			0.0%

Overall, 93 per cent of the workers do not have social security coverage as they work informally. Unsurprisingly, this percentage is lower for the ineligible group (86 per cent). The Marmara and Aegean region has the lowest percentage of informal workers (89 per cent), while the South-east has the highest (95 per cent).

The main labour sectors that refugee workers engage in include unskilled services (21 per cent, e.g., as porters, dish washers, paper collectors), textiles (13 per cent), skilled or craft workers (12 per cent, e.g., tailors), construction work (12 per cent), manufacturing (12 per cent) and agriculture (6 per cent). In Istanbul, around 40 per cent of working individuals work daily, while this proportion rises to 57 per cent in the Marmara and

Aegean region, and 55 per cent in the South-east. In contrast, Istanbul has the highest percentage of salaried workers (58 per cent), while Marmara and Aegean (39 per cent) and the South-east (34 per cent) have the lowest.

Only 4 per cent of households sent at least one of their members to another city to find work in the three months preceding the survey. It is particularly the case for households living in the Mediterranean (8 per cent) and South-east regions (5 per cent), where seasonal work is more frequent. The degree of vulnerability has no influence on work mobility, probably due to the fact that movement restrictions for refugees apply to all. In most cases, only one member of the household made the move to another city.

Income level

Ninety-eight per cent of households had cash income in the 30 days preceding the interview, slightly less in the Mediterranean and Black Sea and Anatolia regions, where the proportion of households without working members is larger.[9] Differences between vulnerability status are minimal, although the proportion of households not reporting any cash income in the last 30 days is slightly larger for highly vulnerable households.

Income levels have improved considerably over the last year. When asked to compare their current level of income with the pre-COVID period, 83 per cent of households declared their income was higher, 14 per cent reported they had the same income, and only 3 per cent a worse income, especially in the Black Sea and Anatolia and Mediterranean regions. Non-vulnerable and slightly vulnerable households were more likely to report the same income or a worse income level.
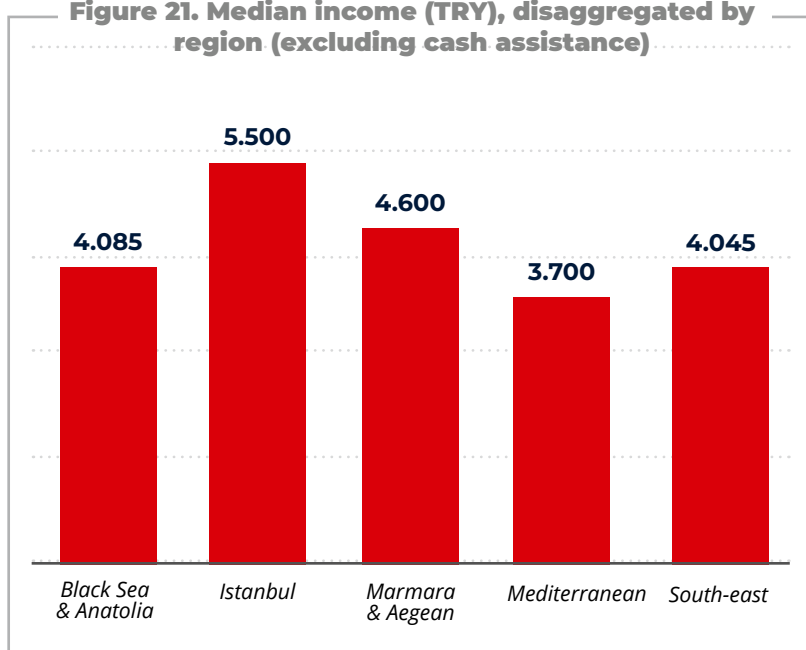
The median income – excluding cash assistance – is TRY 3,180 for ESSN recipients and TRY 4,250 for non-recipients.[10] C-ESSN households have a much lower median income (TRY 2,100), most likely due to the low number of income earners in this particular group. This is a significant increase (more than double) compared with the IVS-1 results in which ESSN recipients earned a median of TRY 1,200 and non-recipients TRY 1,800. This increase is most likely caused by the two recent minimum wage increases implemented by the government to counter the effect of price inflation, as well as households' increased reliance on loans from family and friends (72 per cent of households reported having a debt at the date of the interview). The median per capita income is TRY 761 for C-ESSN households, TRY 695 for ESSN households and TRY 955 for ineligible households.

Unsurprisingly, the highest median income (excluding cash assistance) is found in Istanbul (TRY 4,308 for C-ESSN recipients, TRY 4,500 for ESSN recipients and TRY 5,395 for ineligibles) and the lowest in the Mediterranean region (TRY 1,700 for C-ESSN recipients, TRY 2,550 for ESSN recipients and 3,500 for ineligibles), followed by the South-east and the Black Sea and Anatolia regions. The most recent PDM assessment shows comparable findings, with Istanbul being the region where refugees report the highest incomes, and the South-east registering the lowest (*ESSN*, July 2022). This is consistent with the above findings on the number of working members per household in Istanbul and the better wages in this region. However, it should not simply be inferred that refugees living in Istanbul are better off, as the cost of living and household expenditure in this region are also much higher compared with other regions (Figure 21).

Income levels decrease significantly as the level of vulnerability increases, with non-vulnerable households reporting an average income nearly three times superior to the highly vulnerable ones.

The main sources of cash income for all groups include paid work (median amount of TRY 2,500 among households with paid work), loans from friends or relatives (TRY 1,500 among those who received such loans) and cash assistance from the ESSN programme (TRY 1,000).

Figure 21. Median income (TRY), disaggregated by region (excluding cash assistance)

Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east
4.085	5.500	4.600	3.700	4.045

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9 • Cash income may include salary from paid work, cash assistance, remittances and pensions.
10 • The median indicates that half of the households interviewed have an income higher than TRY 3,200, and half have a lower income. The median is preferred to the mean as it is more robust and less sensitive to outliers.
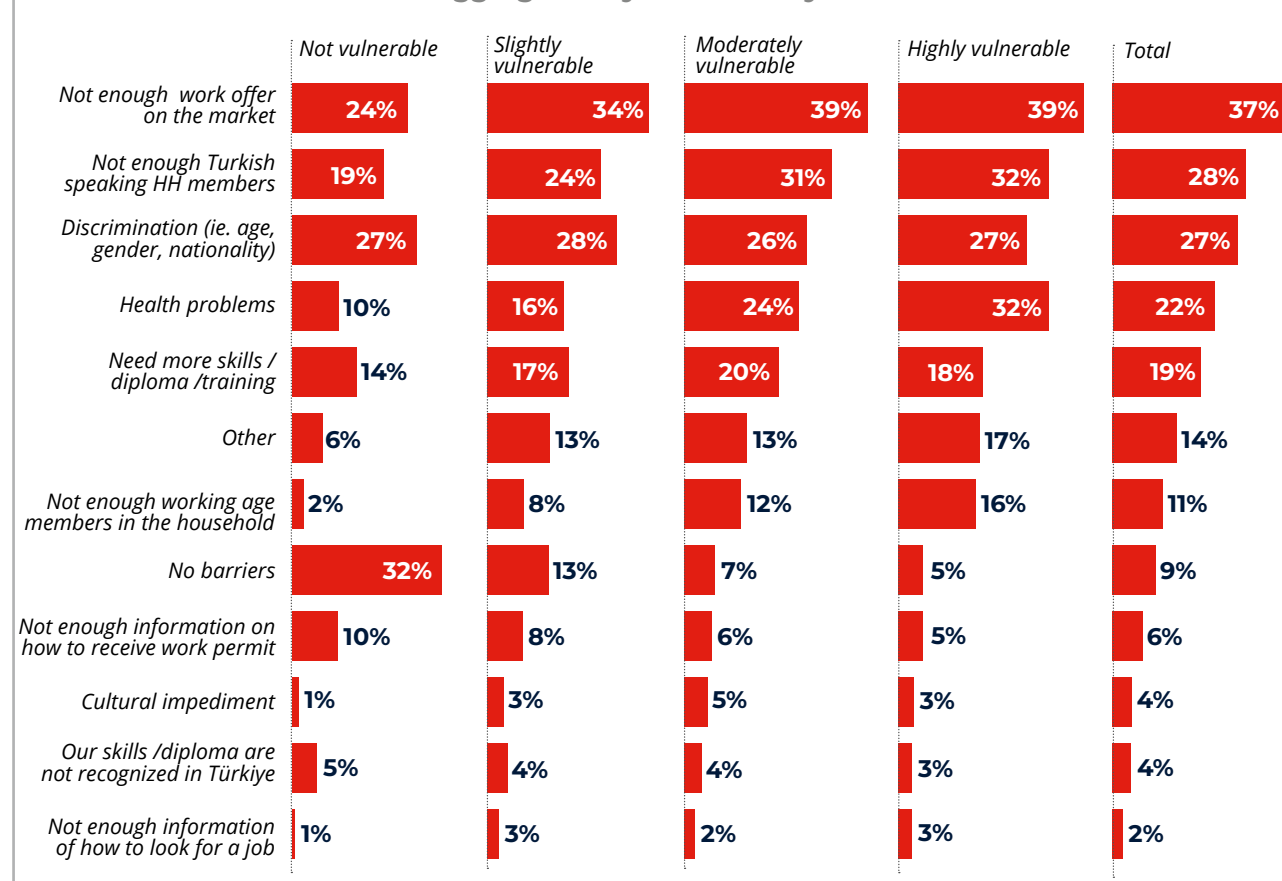
Barriers in accessing work

Several barriers restricting income opportunities have been reported by the respondents. Thirty-seven per cent of households reported that the job market is saturated and 28 per cent that they do not have enough household members who speak Turkish. Discrimination was mentioned by 27 per cent of households, followed by health issues (22 per cent) and the need for more qualifications (19 per cent). Discrimination has long been identified as a barrier for refugees to access job opportunities, as highlighted by a 2020 survey by Syrians Barometer indicating that 13 per cent of Syrian refugees faced discrimination, against 25 per cent in 2017 (*Erdoğan, Syrians Barometer*, 2021/2022). PDM results from July 2022 also indicate that discrimination can be a barrier to employment, especially for those over the age of 50 (*ESSN*, August 2022). A Building Markets report from August 2022 underlines similar barriers, including economic conditions, language difficulties and lack of market knowledge and experience, preventing Syrian entrepreneurs from understanding and accessing local resources and potential customers (*Building Markets*, August 2022).

Differences can be noted by region. The lack of barriers to access work was more frequently mentioned in the Istanbul region (18 per cent), which is also the region with the fewest households affected by labour market saturation (24 per cent, compared with 47 per cent in the Mediterranean region, for instance). The inability to speak Turkish is mentioned by about one-third of respondents in the Black Sea and Anatolia, Istanbul and South-east regions (between 31 and 36 per cent of households) and much less in the Marmara and Aegean and the Mediterranean regions (21 to 22 per cent). Discrimination is more frequently mentioned in the Mediterranean and South-east regions (29 and 36 per cent respectively).

Ninety-five per cent of highly vulnerable households report barriers in accessing income opportunities compared with 68 per cent of the non-vulnerable. They also mention a lack of knowledge of the Turkish language more frequently (32 per cent vs 19 per cent of the non-vulnerable). Discrimination is reported equally across all vulnerable groups (between 26 and 28 per cent) (Figure 22).

Figure 22. Percentage of households per type of barrier to work opportunities, disaggregated by vulnerability status

|	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Total
Not enough work offer on the market	24%	34%	39%	39%	37%
Not enough Turkish speaking HH members	19%	24%	31%	32%	28%
Discrimination (ie. age, gender, nationality)	27%	28%	26%	27%	27%
Health problems	10%	16%	24%	32%	22%
Need more skills / diploma /training	14%	17%	20%	18%	19%
Other	6%	13%	13%	17%	14%
Not enough working age members in the household	2%	8%	12%	16%	11%
No barriers	32%	13%	7%	5%	9%
Not enough information on how to receive work permit	10%	8%	6%	5%	6%
Cultural impediment	1%	3%	5%	3%	4%
Our skills /diploma are not recognized in Türkiye	5%	4%	4%	3%	4%
Not enough information of how to look for a job	1%	3%	2%	3%	2%

Burden of debt

Earlier results highlighted that loans from relatives or friends are the second source of cash income reported by interviewed households. Seventy-three per cent of households reported having a debt in the six months preceding the interview, and 72 per cent declared they still have a debt now, a finding similar to IVS-1. Only a very small fraction of households (0.15 per cent) reported having asked for a loan that was turned down, demonstrating a good level of solidarity among refugees. For households with loans from banks or from informal sources, the median total outstanding debt (TRY 3,000) is 50 per cent larger than their median income from paid work (TRY 2,000).

The proportion of households with debt is very similar between regions. However, the proportion of ESSN recipients relying on debt (76 per cent) is higher than for C-ESSN recipients (64 per cent) or non-eligible households (70 per cent). As expected and mentioned above, highly vulnerable households are more frequently indebted (84 per cent) compared with non-vulnerable households (42 per cent). According to the PDM reports mentioned earlier, debts are used primarily to meet the most basic needs, namely, food, rent, utilities, essential non-food items and healthcare (*ESSN*, August 2022; *ESSN*, 2021/ 2022; *ESSN*, July 2022).

The median debt amount of ESSN households (TRY 3,130) is nearly at the same level as one month of median income and a 20 per cent increase compared with 2021 levels. For C-ESSN recipients, the median household debt is TRY 3,000. However, the median debt amount for non-recipients went from TRY 3,000 in IVS-1 to TRY 4,000 in IVS-2, indicating a higher level of indebtedness in the ineligible population to face expenditure and price inflation, and/or better access to credit. Overall, the median debt amount per capita is TRY 600 for C-ESSN recipients, TRY 500 for ESSN recipients and TRY 833 for non-recipients (Figure 23).

For households with loans, median debt levels are generally higher in Istanbul (TRY 4,000) and the South-east (TRY 3,700) compared with the rest of the country (TRY 3,000).

Figure 23. Median debt amount over time (TRY), disaggregated by affected groups (June 2020 to July 2022)
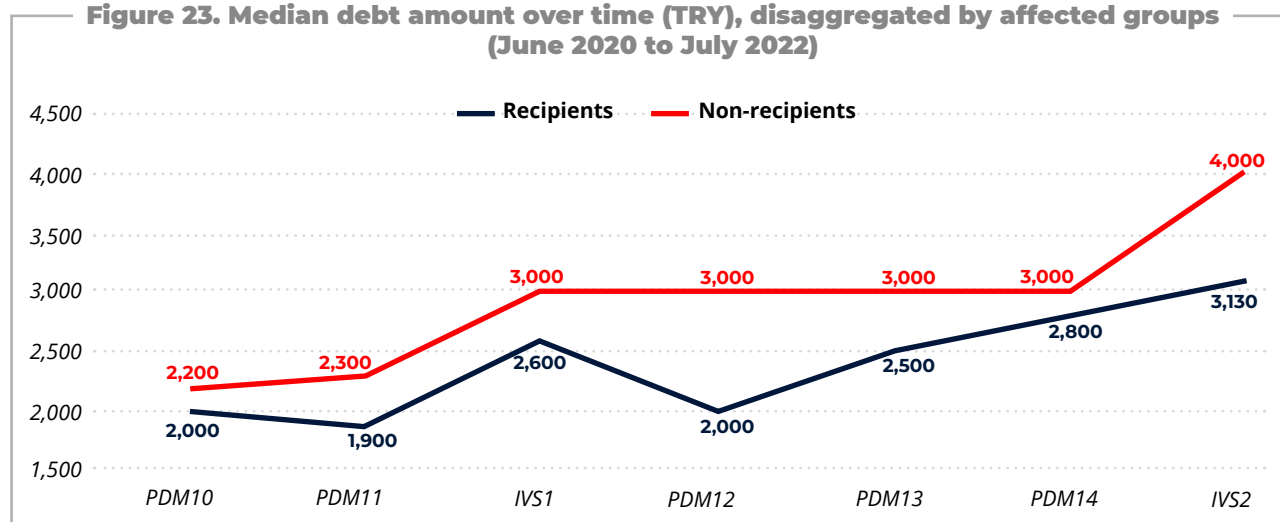
In the 30 days preceding their interview, 77 per cent of debtors did not make a payment. Of those who did, half reimbursed less than TRY 500, 27 per cent between TRY 500 and TRY 1,000, and 24 per cent above TRY 1,000. Non-vulnerable households usually have access to more cash, due to better income, and can thereby reimburse larger sums. Nearly 70 per cent of non-vulnerable households declared they were able to reimburse an amount larger than TRY 1,000 in the past month, against 14 per cent of the highly vulnerable.

Generally, and across all groups, the percentage increase in debt levels is smaller than the percentage increase in income and expenditure, which may indicate that households can borrow up to a certain limit since they mainly rely on loans from individuals (friends, relatives) or individual businesses (local shops).[11]

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11 • Non-Turkish citizens can apply for loans from banks only if they have residence or work permits.

Savings

Ninety-six per cent of households do not have any savings, and the overall monthly saving capacity remains very low for most households, around TRY 95 per month on average. Highly vulnerable households never save any money, while non-vulnerable households were able to save TRY 300 on average in the month preceding the survey.

Expenditure

The combined effect of increased incomes and high price inflation resulted in a significant increase in household expenditure, following a similar trend to that of debt and income. Median expenditure increased more than 100 per cent over the last year, from TRY 2,560 to TRY 5,926 for ESSN recipients, compared with TRY 2,500 to TRY 6,053 for non-recipients (Figure 24).

Figure 24. Median expenditure (TRY) over time (June 2020 to July 2022)
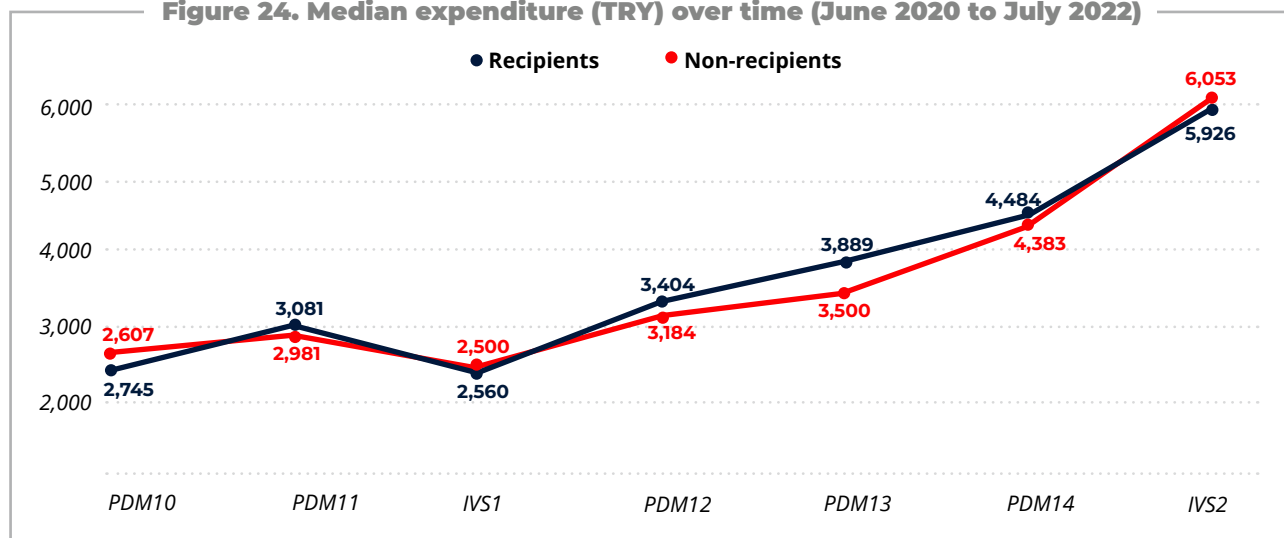
Similarly to IVS-1, households spend most of their income on the most basic goods and services. On average, nearly 80 per cent of income expenditure is allocated to food, shelter, energy, education and hygiene items, which is exactly the same share as reported in the last PDM exercise (*ESSN*, 23 August 2022). Education expenditure has increased considerably compared with 2021, probably due to the cost of the return to school after COVID-19 (transport, equipment, uniforms, etc.).

The most important increase in expenditure is on food commodities, which doubled over the last year. This is very likely due to inflation, which led to a 116 per cent annual increase in food basket costs between June 2021 and June 2022. Energy expenditure is now nearly equal to housing costs and has also doubled since 2021, also most certainly due to price increases (54 per cent increase between January and June 2022, according to Türkiye's *Consumer Price Index* of 2022). Hygiene expenditure has also risen compared with 2021. Expenditure has increased slightly for all other items, moderately when compared with food, education, hygiene and energy; however, this is most probably due to households' prioritization of expenditure on critical items.

Expenditure value for the five top items is generally higher in the Istanbul and Marmara and Aegean regions, especially food expenditure. This can be explained by the higher inflation as well as higher earning power in Istanbul compared with the rest of the country. Typical median food expenditure is the same for all groups (TRY 2,143), but mean food expenditure differs somewhat and is higher for non-eligible households (TRY 2,603) than for C-ESSN (TRY 2,380) and ESSN (TRY 2,520) recipients. Median total expenditure for the top five items is TRY 3,883 for non-eligible, TRY 4,163 for C-ESSN and TRY 4,240 for ESSN households.

Expenditure variations

Ninety-five per cent of households indicated that energy prices vary depending on the season. The most important overall expenditure increase is expected between October and March each year, due mainly to heating expenses but also to food and electricity (50 per cent) and clothes (38 per cent). Highly vulnerable households reported more variations in prices over the year compared with the non-vulnerable, especially for food, clothing, medical expenses, water and hygiene items.

LIVING STANDARDS

This section summarizes the ability of the households interviewed to meet their basic needs, i.e., to access or obtain basic goods or services essential to guarantee decent living standards. The overall ability to meet basic needs is calculated using an index based on three values: household durable items ownership; the dependency ratio; and expenditure-based poverty level. The resulting living standard index is a sub-index of the overall IVS-2 severity index used to categorize the severity and vulnerability of refugee households in Türkiye.

- Overall, 13 per cent of interviewed refugees face severe difficulties in meeting all their basic needs; 47 per cent face moderate difficulties; 34 per cent face stress; and only 6 per cent are comfortable in meeting their needs. The overall ability of households to meet their basic needs has improved slightly compared with 2021, probably due to the end of the COVID-19 restrictions and wage increases that led to households' raised income. This is also corroborated by slightly better asset ownership. While the situation has improved, 60 per cent of the assessed refugee population still has to face suboptimal living standards on a daily basis and in a difficult economic environment.

- Meeting basic needs is easier in Istanbul and the Marmara and Aegean region compared with the South-east and Black Sea and Anatolia regions, mostly due to important differences in income levels. The percentage of households facing moderate to severe difficulties in meeting basic needs is much higher for ESSN households (74 per cent) compared with C-ESSN recipients (63 per cent) or ineligible households (26 per cent), indicating more precarious conditions and more difficult living conditions for ESSN recipients, who do not benefit from the additional cash assistance offered by the C-ESSN programme. Unsurprisingly, more than half of the highly vulnerable households face severe difficulties in meeting their basic needs, while none of the non-vulnerable households do.

- Fifty-nine per cent of households interviewed reported living in housing of poor quality, especially the most vulnerable. Ninety-six per cent of households rent their house, and less than 1 per cent own their dwelling. Thirteen per cent of households share their house with other families, especially in Istanbul (23 per cent) and the Marmara and Aegean region (20 per cent). Electricity is widely available as well as separate kitchens, safe water, sanitation facilities and waste management. As expected, non-vulnerable households have more durable assets compared with vulnerable ones.

- Only 7 per cent of households reported they are comfortable enough to meet food, housing, energy, education and hygiene needs, which account for 80 per cent of households' average monthly expenditure. Eighteen per cent often have to prioritize expenses, and 1 per cent report not being able to meet their basic needs at all. Seventy-three per cent can barely meet those five needs with their current income. Housing rental costs being the least adjustable expense, households tend to deprioritize first food, education and energy expenses. Across the five items measured, 5 per cent of the highly vulnerable absolutely cannot meet their basic needs, and 41 per cent often have to prioritize other expenses, compared with only 1 per cent of the non-vulnerable households.

Ability to meet basic needs

The overall ability of households to meet their basic needs has slightly improved since the end of COVID-19. While the percentage of people facing severe difficulties in meeting basic needs has not changed since 2021 (13 per cent), the proportion of people facing moderate difficulties has decreased by eight percentage points, and the households facing no difficulties have increased from 2 to 6 per cent. This can be explained by the end of the restrictions and the minimum wage increases that led to households' raised income (Figure 25).

Figure 25. Percentage of households by living standard index class, comparison IVS-1 and IVS-2

	Normal	Stressed	Moderate	Severe
IVS 1	2%	30%	55%	13%
IVS 2	6%	34%	47%	13%
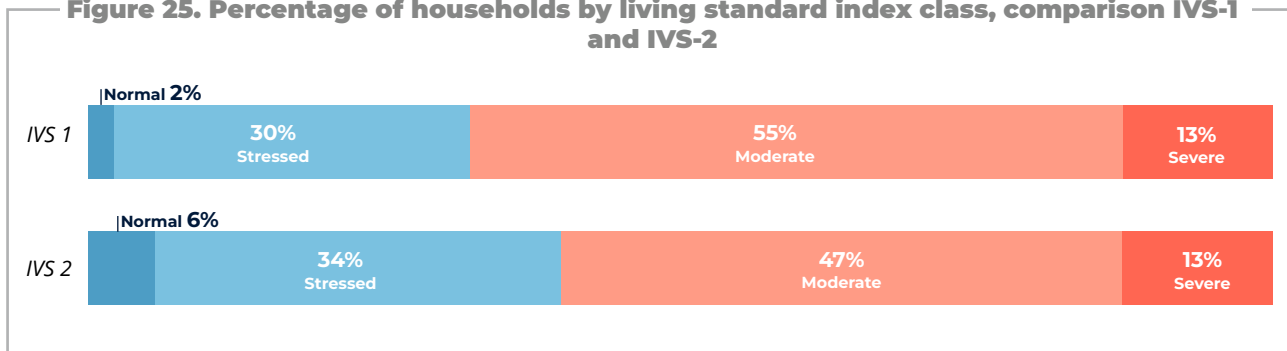
Important differences between regions are observed. The highest proportion of households facing severe difficulties in meeting basic needs is found in the South-east (17 per cent), Black Sea and Anatolia (14 per cent) and Mediterranean (13 per cent) regions. Both Istanbul and the Marmara and Aegean region report 8 per cent of households facing severe difficulties in meeting their basic needs. Istanbul has the highest proportion of households facing no difficulties in meeting basic needs (10 per cent), while the South-east and the Black Sea and Anatolia have the lowest (4 per cent for both) (Figure 26).

Figure 26. Percentage of households by living standard index class and IVS geographical region

	Normal	Stressed	Moderate	Severe
Black Sea & Anatolia	4%	28%	54%	14%
Istanbul	10%	42%	40%	8%
Marmara & Aegean	6%	43%	43%	8%
Mediterranean	6%	31%	50%	13%
South-east	4%	33%	47%	17%
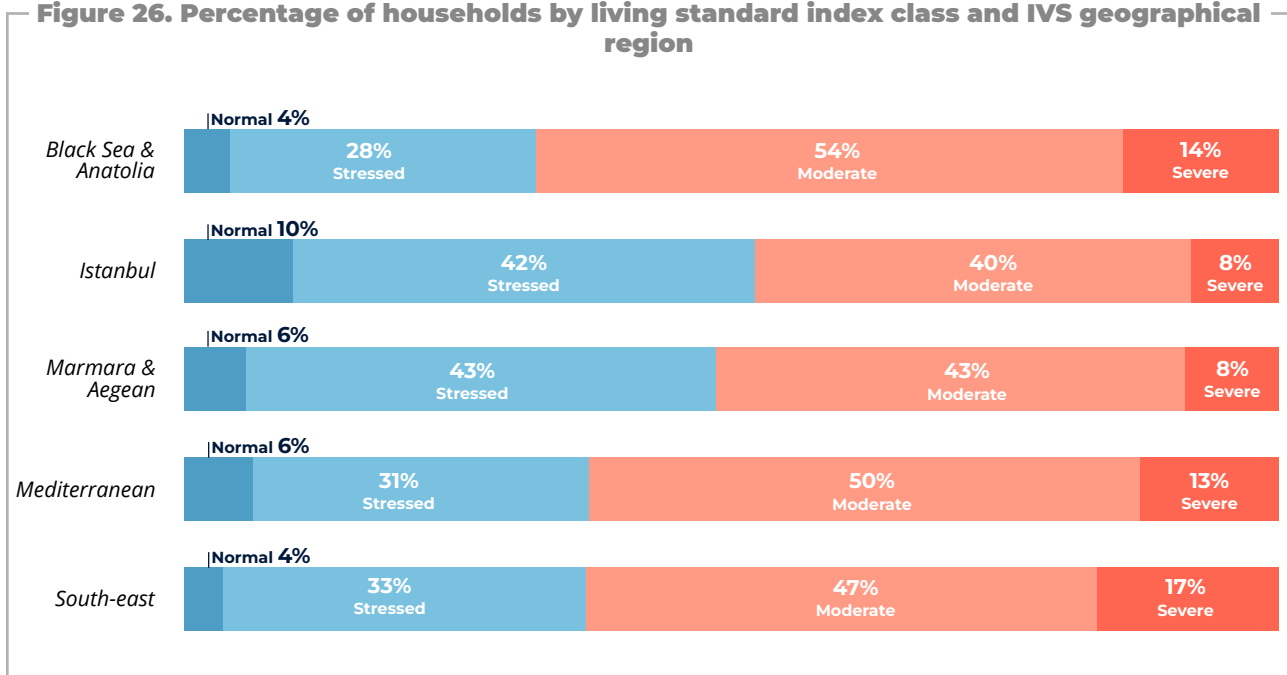
Differences between recipient and non-recipient groups are also observed. Unsurprisingly, eligible households (C-ESSN and ESSN) have a higher proportion of households facing severe difficulties in accessing basic goods and services (16 per cent for both groups compared with 2 per cent of the ineligible households). In addition, ineligibles have roughly half as many households with moderate difficulties as eligible households, and 17 per cent facing no difficulties in meeting their basic needs, compared with only 1 per cent of ESSN households and 5 per cent of C-ESSN households (Figure 27).

Figure 27. Percentage of households by living standard index class and eligible group
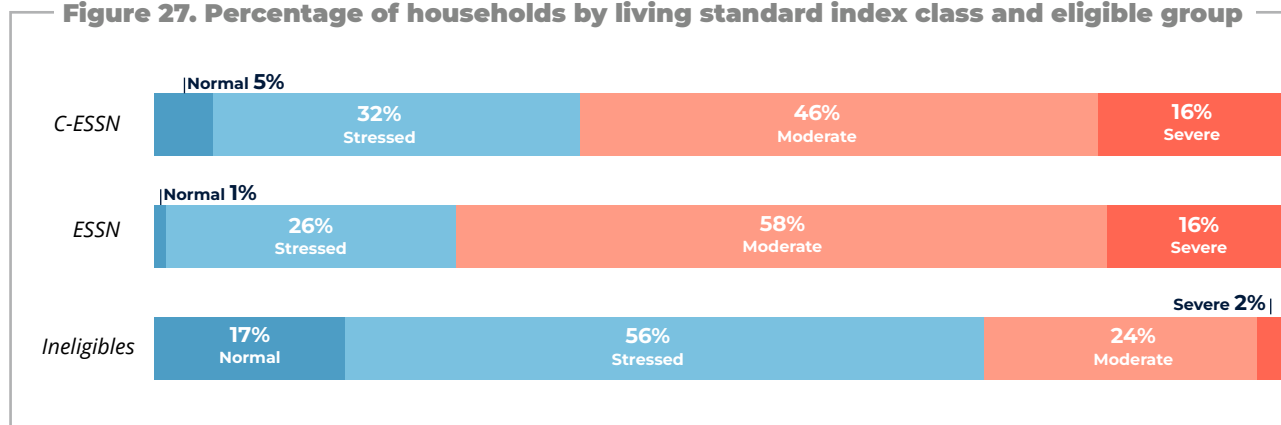
	Normal	Stressed	Moderate	Severe
C-ESSN	Normal 5%	32% Stressed	46% Moderate	16% Severe
ESSN	Normal 1%	26% Stressed	58% Moderate	16% Severe
Ineligibles	17% Normal	56% Stressed	24% Moderate	Severe 2%

More than half of the highly vulnerable households face severe difficulties in meeting their basic needs, while two-thirds of non-vulnerable households face no difficulties at all, and less than 30 per cent fall in the stressed category. None of the non-vulnerable households face moderate or severe difficulties in meeting basic needs (Figure 28).

Figure 28. Percentage of households by living standard index class and vulnerability status

	Normal	Stressed	Moderate	Severe
Not vulnerable	72% Normal	28% Stressed		
Slightly vulnerable	10% Normal	53% Stressed	31% Moderate	Severe 1%
Moderately vulnerable	Normal 1%	22% Stressed	63% Moderate	14% Severe
Highly vulnerable		Stressed 3%	42% Moderate	54% Severe
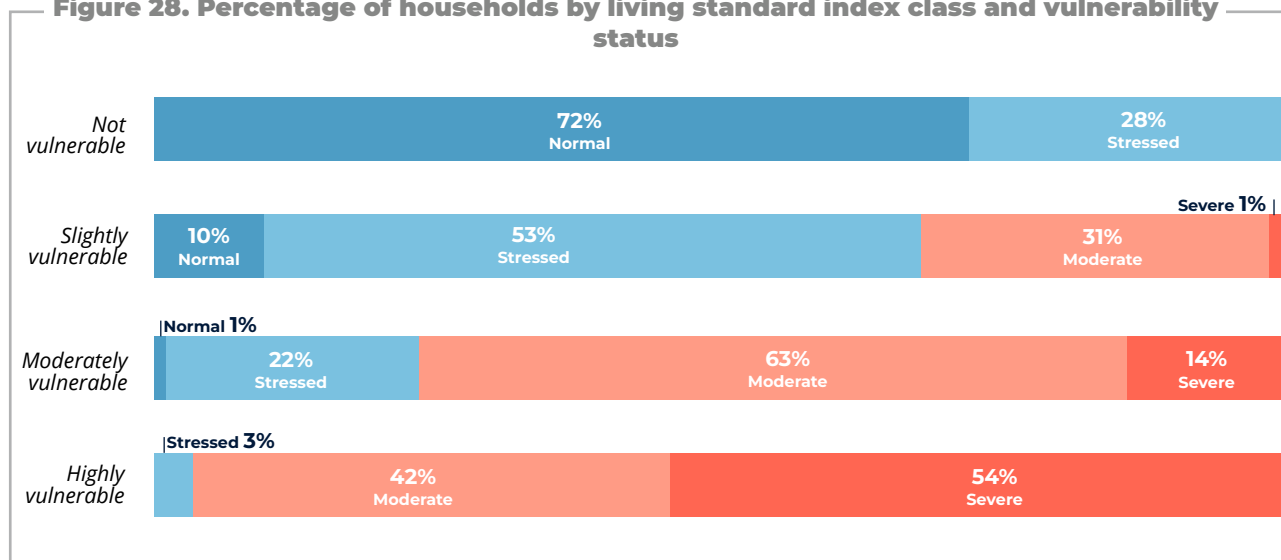
Minimum expenditure basket

Due to inflation and price changes, the value of the minimum expenditure basket (MEB) per capita in Türkiye has evolved considerably over the last few months, from TRY 858 in January 2022 up to TRY 1,083 in July 2022. Using this last value as a reference, the TRC and IFRC estimated that 76 per cent of the refugee households interviewed cannot afford the MEB in Türkiye. The highest proportion of people below MEB level is found in the Black Sea and Anatolia region (82 per cent), and the lowest in Istanbul (60 per cent) and the Marmara and Aegean region (68 per cent). More ESSN households are below MEB level (77 per cent) compared with C-ESSN (76 per cent) and non-eligible (72 per cent) households.

Housing

Fifty-nine per cent of refugees live in houses of poor quality and 3 per cent in unfinished buildings. Only one-third of households interviewed report living in good-quality houses. Habitat in the Black Sea and Anatolia region seems to be better, as only 44 per cent of interviewees there report living in houses of poor quality. ESSN recipients have less access to good-quality houses, with 62 per cent reporting living in poor-quality houses compared to 55 per cent of C-ESSN recipients and 52 per cent of ineligibles. Understandably, most vulnerable households tend to live in housing of poorer quality: 70 per cent of highly vulnerable households live in poor-quality houses compared with only 23 per cent of non-vulnerable households. Luxurious houses are only accessible to the non-vulnerable (19 per cent) and slightly vulnerable (3 per cent) groups. Highly vulnerable households also tend to rely on alternative shelter, such as unfinished buildings (6 per cent), barns (2 per cent) and stores (2 per cent) (Figure 29).

Figure 29. Percentage of households by housing quality, disaggregated by vulnerability status

	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Total
Bad quality	23%	51%	64%	70%	59%
Good quality	57%	43%	29%	17%	34%
Unfinished	1%	2%	4%	6%	3%
Luxurious	19%	3%	1%	0%	2%
Other	0%	1%	1%	3%	1%
Barn	0%	0%	1%	2%	1%
Store	0%	1%	0%	2%	1%
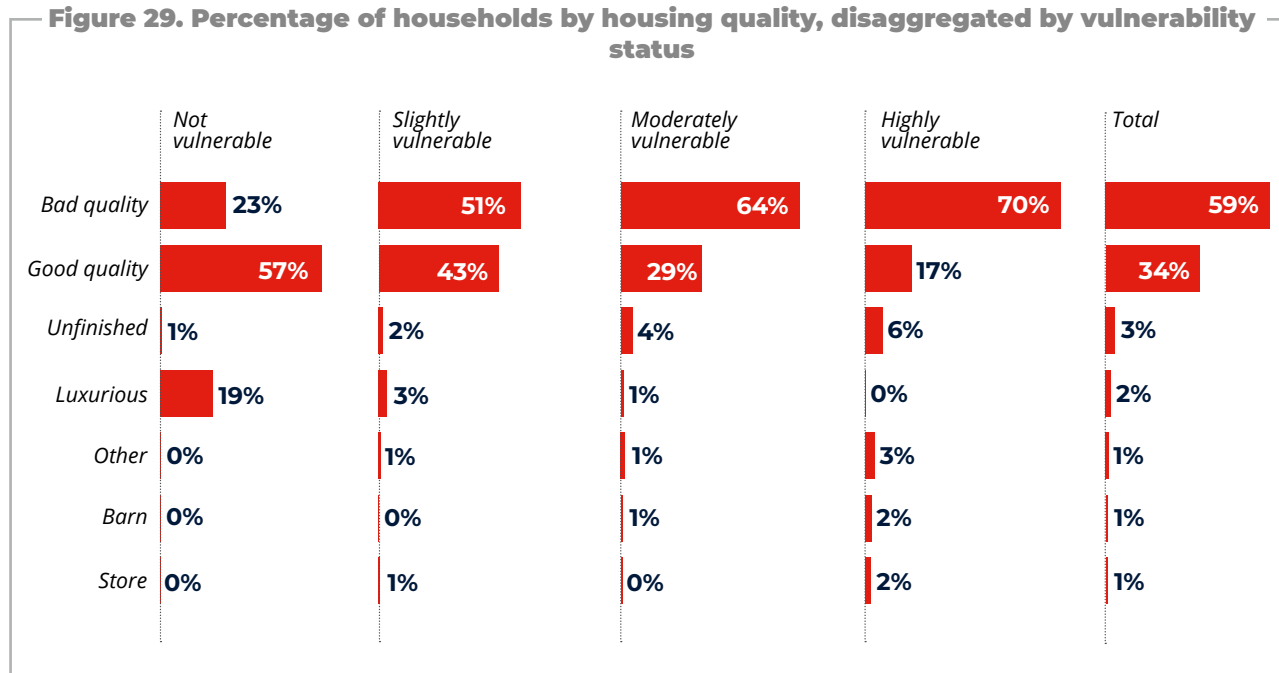
Ninety-six per cent of households rent their house, and 3 per cent have houses provided by relatives or philanthropists (mostly in the South-east region). Only 0.3 per cent of refugees own their house, all of whom are categorized as non-vulnerable.

Thirteen per cent of households share their house with other families, especially in Istanbul (23 per cent) and the Marmara and Aegean region (20 per cent), compared with only 8 per cent in both the Mediterranean and South-east regions. This is mostly due to the high cost of rent in the former two regions. For instance, according to the Economic and Societal Research Centre at Istanbul's Bahcesehir University, housing rents in Istanbul showed an annual increase of 112 per cent to March 2022, a significantly higher rate of increase than in any other major cities (e.g., 107 per cent in Ankara and 75 per cent in Izmir) (*BalkanInsight*, 9 June 2022). Sharing houses is more frequent for ESSN beneficiaries (11 per cent) compared with C-ESSN (16 per cent) and ineligible households (15 per cent). Eighty-two per cent of those sharing houses are slightly or moderately vulnerable, and 16 per cent are highly vulnerable, indicating a coping strategy largely aimed at reducing expenditure. Ninety-eight per cent of houses include a separate kitchen, and highly vulnerable households tend not to have separate kitchens. Moreover, the average number of bedrooms available ranges from 2.4 in the Black Sea and Anatolia region down to 1.9 in the South-east region. The average number of bedrooms decreases depending on the vulnerability class households fall into. The greater the vulnerability, the lower the number of bedrooms available.

Energy

Regarding access to energy, 99.5 per cent of households use electricity for lighting, demonstrating appropriate access to electricity over the entire country. The type of cooking fuel used varies greatly between regions. Propane tube and natural gas are mostly used across the country; however, gas is used by only 6 per cent of households in the Mediterranean region, where electricity (28 per cent) and portable propane tube (8 per cent) are used in addition to propane tube (54 per cent). In Istanbul, gas is used by 78 per cent of households and charcoal by only 2 per cent.

Highly vulnerable households tend to use charcoal more frequently (7 per cent), after portable propane tube (11 per cent), gas (19 per cent), electricity (23 per cent) and propane tube (40 per cent). The fact that municipalities and national social welfare include charcoal in their in-kind assistance can partly explain why this is mostly used by highly vulnerable households, as they would receive it for free in some areas of the country. Nearly 10 per cent of the highly vulnerable report not having access to sufficient cooking fuel (Figure 30).

Figure 30. Percentage of households by energy source, disaggregated per region

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Propane tube	43%	20%	44%	54%	45%	43%
Gas	49%	78%	49%	6%	15%	32%
Electricity	3%	0%	3%	28%	24%	15%
Portable propane tube	1%	0%	2%	8%	12%	6%
Wood charcoal	4%	2%	2%	4%	4%	3%
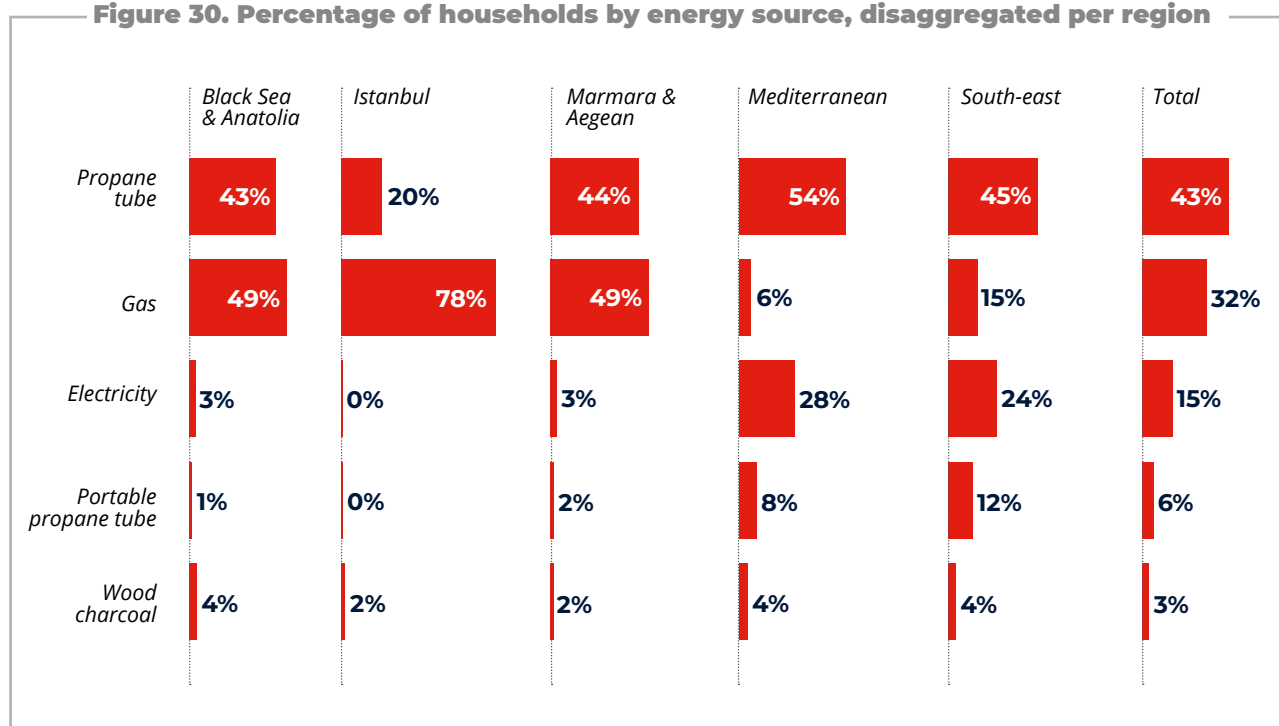
Water, sanitation and waste management

Access to drinking water is reported to be sufficient by 99 per cent of households, with most sources of water being adequate and safe. Indeed, 53 per cent of households use tap water for drinking, considered safe to drink by the Turkish government; 25 per cent filter their tap water; and 18 per cent purchase water bottles.

Drinking water sources vary considerably between regions. Istanbul households rely more often on filtered (53 per cent) and bottled (32 per cent) water than households in any other region. Nearly two-thirds of households in the Black Sea and Anatolia, Mediterranean and South-east regions rely on tap water. While only one-third of non-vulnerable households use tap water for drinking, the proportion rises to two-thirds for the highly vulnerable, who do not have the means to purchase filtration systems or bottled water. Despite overall adequate access to water, access to hygiene items remains unequal, as nearly 10 per cent of highly vulnerable households report not having sufficient access to hygiene items. Waste management is reported by respondents to be adequate, as 97 per cent have their waste collected regularly by the municipality (Figure 31).

Figure 31. Percentage of households by drinking water type, disaggregated by region

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Tap water	63%	13%	43%	60%	66%	53%
Filtered water	11%	53%	31%	22%	19%	25%
Bottled water	18%	32%	23%	15%	11%	18%
Fountain	8%	1%	2%	1%	1%	2%
Well water	0%	1%	2%	1%	4%	2%
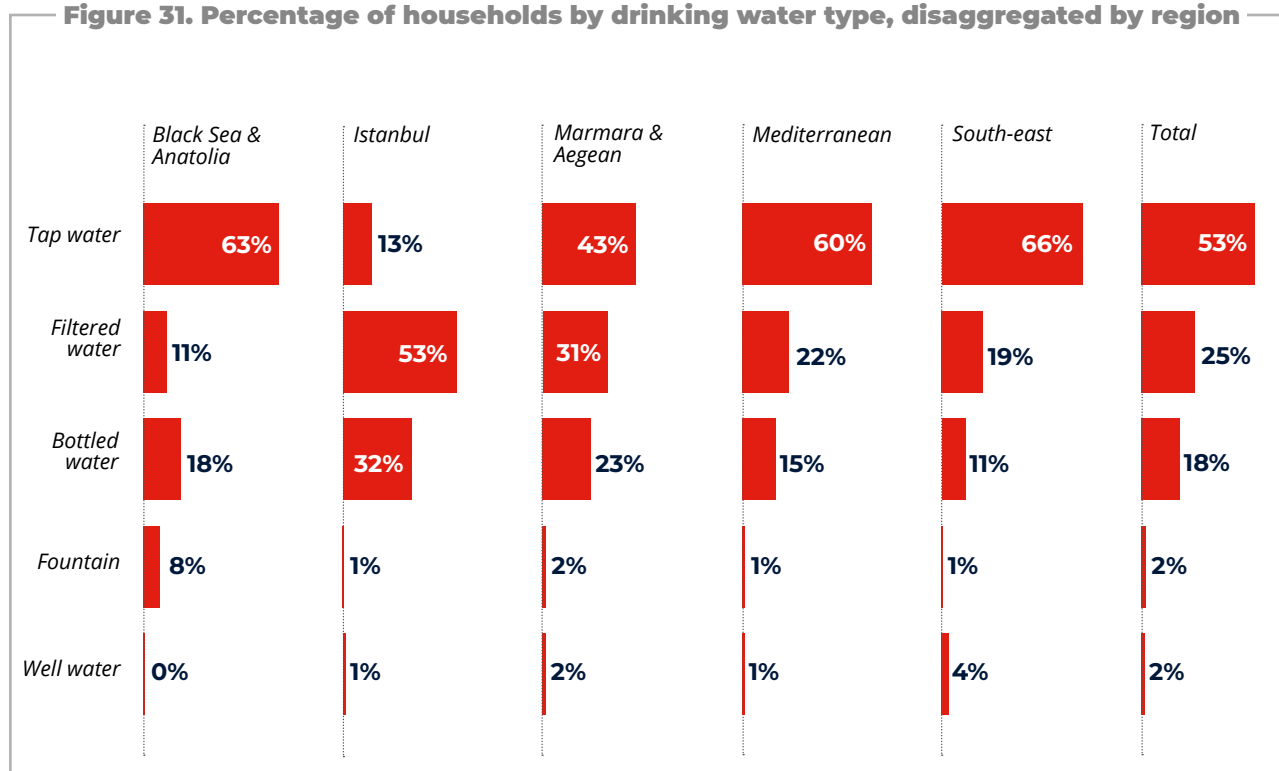
Likewise, sanitation is generally appropriate for most refugees responding to the survey. Ninety-two per cent of households interviewed have access to toilets inside their house, and only 8 per cent use outside toilets (16 per cent in the South-east region). No household reported using open defecation. Ten per cent of ESSN households use toilets outside their house compared with 5 per cent of C-ESSN recipients and 4 per cent of non-recipients. Highly vulnerable households are more likely to use toilets situated outside. While in general each household has its own toilet, one in three households share toilets in Istanbul.

Ability to meet the five most expensive basic needs

As highlighted above, households report that on average nearly 80 per cent of income expenditure is allocated to food, shelter, energy, education and hygiene items. Households were also asked to indicate whether they are able to meet each of these five needs on a scale ranging from "absolutely cannot meet or afford the need" to "can largely meet the need, even for more people if necessary".

Overall, few households (7 per cent) reported being comfortable enough to meet the five selected basic needs, while most have to prioritize expenditure. This represents an increase of four percentage points compared with IVS-1, demonstrating a slight improvement for some households. Eighteen per cent often have to prioritize expenses, and 1 per cent report not being able to meet their basic needs at all. Seventy-three per cent can barely meet these five needs with their current means.

The South-east and Mediterranean are the two regions with the highest percentages of households who can meet their needs without difficulties (11 per cent and 9 per cent respectively), while Istanbul is the region with the highest percentage of households who often have to prioritize other expenditure (25 per cent). The percentage of households who have to prioritize expenses is very similar among both ESSN and C-ESSN recipients (19 per cent and 18 per cent); however, 14 per cent of ineligibles also report having to prioritize expenses (Figure 32).

Figure 32. Percentage of households able to meet the five most expensive basic needs

	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	Total
Education commodities	23% / 72%	32% / 64%	31% / 63%	21% / 72%	76%	22% / 69%
Energy	21% / 74%	27% / 68%	22% / 74%	24% / 72%	74% / 21%	72%
Food commodities	21% / 75%	25% / 70%	23% / 73%	19% / 72%	77%	19% / 74%
Hygiene commodities	19% / 76%	22% / 72%	78%	18% / 72%	76%	75%
Housing	77%	19% / 75%	80%	72%	76%	76%
Total	19% / 75%	25% / 70%	20% / 75%	19% / 72%	76%	18% / 73%

Colour Legend:

- Absolutely can't meet/afford this need since a long time
- Can't always meet/affort this need and often have to prioritize other expenditure
- Can barely meet/afford this need, or just enough
- Can meet/afford this need
- Can largely meet/afford this need, even for more people

Unsurprisingly, the proportion of households unable to meet these basic needs increases with vulnerability status. Across the five items measured, 5 per cent of the highly vulnerable absolutely cannot meet their basic needs, and 41 per cent often have to prioritize other expenses, compared with only 1 per cent of the non-vulnerable households (Figure 33).

Figure 33. Percentage of households able to meet their needs, per severity and type of need, disaggregated by vulnerability status
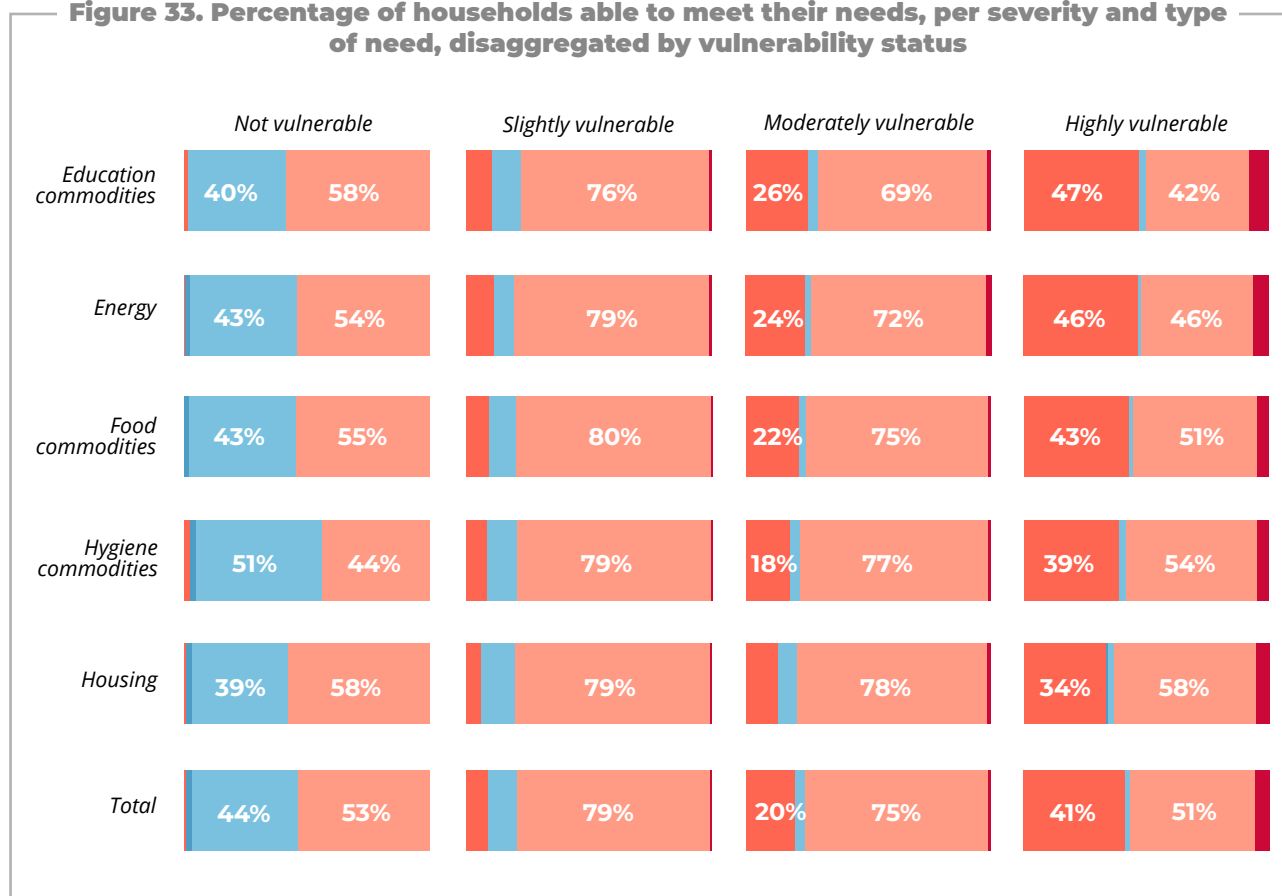
Durable asset ownership. Analysis of durable asset ownership reveals that nearly all households own a smartphone (98 per cent), a refrigerator (91 per cent) and a washing machine (87 per cent). These figures have all increased by a few percentage points since IVS-1 (respectively 6, 6 and 5), corroborating the finding that the situation has improved slightly compared with 2021. Only 0.5 per cent own a van or a truck, 5 per cent a computer or a car, and 6 per cent air conditioning (especially households in the Mediterranean and South-east regions). Seven per cent of households own a motorcycle (especially in the Mediterranean region). Only 8 per cent own a dishwasher. Thirty per cent have access to central heating/natural gas, with the proportion rising to 71 per cent in Istanbul. According to Reuters, household natural gas prices have risen by 174 per cent since 2021 and could thus become an important household expenditure item as winter approaches (*Reuters*, 1 September 2022).

As expected, non-vulnerable households have more assets compared with vulnerable ones. Thirty-one per cent own a computer (vs 1 per cent for the highly vulnerable), 28 per cent air conditioning (vs 2 per cent) and 36 per cent a dishwasher (vs 3 per cent). All non-vulnerable households have winter clothes available, while only 29 per cent of highly vulnerable households have any (Figure 34).

Figure 34. Percentage of households owning durable items, disaggregated by vulnerability status, region and affected group

	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Black Sea & Anatolia	Istanbul	Marmara & Aegean	Mediterranean	South-east	C-ESSN	ESSN	Non-Recipients
Smart phone	100%	98%	98%	94%	97%	97%	98%	98%	98%	97%	98%	98%
Refrigerator	98%	96%	90%	76%	93%	92%	92%	91%	90%	93%	90%	94%
Washing machine	100%	94%	86%	67%	87%	88%	90%	84%	89%	87%	87%	88%
Wifi (home)	98%	87%	79%	66%	83%	91%	88%	82%	71%	83%	79%	85%
Oven/Cooking stove	100%	87%	75%	60%	88%	84%	87%	74%	70%	81%	75%	83%
Bed	96%	86%	72%	57%	80%	70%	73%	71%	84%	77%	75%	80%
Sufficient blankets	99%	88%	70%	43%	72%	65%	68%	79%	80%	76%	72%	79%
TV	92%	78%	67%	47%	65%	73%	70%	64%	74%	67%	69%	71%
Heating stove	45%	63%	71%	76%	62%	29%	56%	87%	79%	63%	73%	59%
Winter clothes	99%	84%	59%	29%	57%	60%	64%	71%	71%	69%	61%	74%
Sofa	86%	71%	54%	41%	69%	76%	66%	59%	45%	67%	54%	69%
Satellite dish	73%	66%	58%	38%	55%	42%	51%	60%	74%	57%	61%	57%
Internet via phone	94%	69%	52%	45%	63%	57%	61%	52%	61%	51%	59%	65%
Matresses	87%	60%	42%	26%	58%	60%	50%	49%	34%	51%	42%	60%
Mobile phone (Basic)	25%	28%	32%	38%	19%	35%	23%	38%	33%	28%	33%	30%
Central heating	60%	39%	26%	16%	45%	71%	43%	5%	17%	39%	23%	38%
Table	63%	32%	17%	6%	22%	28%	23%	23%	18%	24%	17%	32%
Chair	66%	31%	17%	6%	22%	27%	21%	24%	19%	24%	17%	32%
Dishwasher	36%	12%	6%	3%	7%	13%	7%	6%	10%	11%	6%	11%
Motorcycle (up to 125cc)	6%	7%	7%	4%	6%	2%	2%	11%	7%	5%	7%	7%
Air-conditioning	24%	9%	5%	2%	1%	2%	3%	12%	8%	5%	5%	10%
Car	28%	8%	4%	1%	3%	3%	4%	8%	6%	5%	4%	9%
Computer	31%	9%	2%	1%	7%	5%	3%	4%	6%	5%	3%	10%
Van/truck	3%	1%	0%		0%	1%	0%	0%	1%	0%	0%	1%

COPING MECHANISMS

This section summarizes the ability of the households interviewed to cope with challenging living standards. The extent to which households can cope with deprivation in basic goods and services is calculated using an index based on two values: the reduced Food Coping Strategy Index (rCSI) and the Livelihood Coping Strategy Index (LCSI), which have been consistently used in the refugee context in Türkiye since the beginning of the ESSN programme. The resulting Coping Strategy Index is a sub-index of the overall IVS-2 severity index used to categorize the severity and vulnerability of refugee households in Türkiye. The results from the PDM exercises conducted since 2018 are also used to compare the evolution of the rCSI and the LCSI over time (Figure 35).

- The proportion of households engaging in moderate to severe coping strategies has increased slightly over the last year (from 16 to 18 per cent).

- The rCSI scores are at their highest historical level for ESSN, C-ESSN and non-recipients, especially in Istanbul and the Marmara and Aegean region. Despite higher incomes, refugee households rely increasingly on negative food coping strategies to cope with high food prices. Compared with IVS-1, the rCSI rose by 30 per cent for eligible households and by 35 per cent for ineligible households.

- Relying on less preferred or less expensive food was the most frequently adopted strategy, followed by reducing the portion size of meals, reducing the number of meals eaten per day, restricting adult portions, and borrowing food or money to buy food

- While highly vulnerable households have to rely on all possible food coping strategies, one-third of households considered non-vulnerable also have to rely on less preferred or less expensive food.

- Surprisingly, the severity of the livelihood coping strategies adopted by refugees has reduced over the last year and is currently slightly greater for non-recipients compared with recipients. Buying food on credit, borrowing money from non-relatives and selling productive assets are the main strategies adopted.

Figure 35. Percentage of households by severity class of the Coping Strategy Index, IVS-1 vs IVS-2
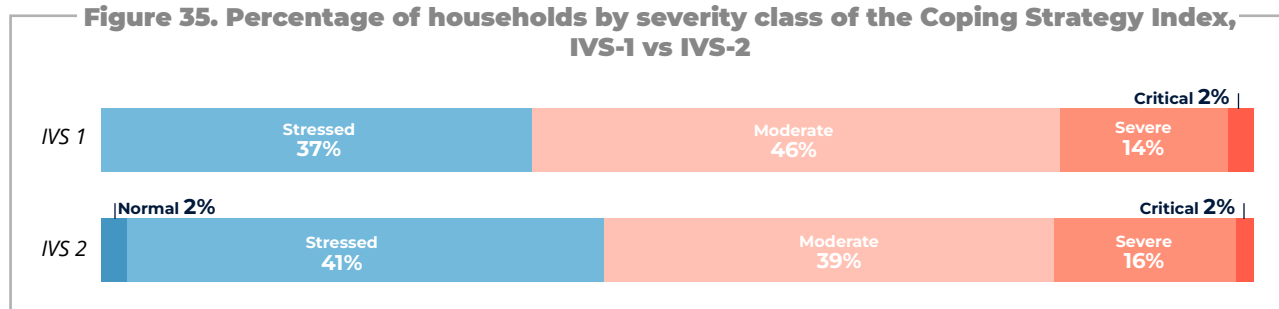
The severity of coping strategies has evolved slightly since 2021, especially on both extremes of the scale. Two per cent of households are now not using any negative coping mechanisms, compared with none in 2021. The proportion of households falling in the severe and critical categories of the index rose from 16 per cent in 2021 to 18 per cent in 2022, showing a slight worsening of the situation. The proportion of stressed households rose by 4 per cent, suggesting that some households in the moderate class in 2021 were able to reduce their use of negative coping strategies and moved down one class in the index.

The South-east (55 per cent) and Black Sea and Anatolia (50 per cent) regions have the lowest percentages of households engaging in negative coping strategies or stressed strategies. In these areas, only 11 per cent and 13 per cent of households respectively fall into the severe and critical severity categories, compared with 22 per cent in Istanbul and 21 per cent in Marmara and Aegean and the Mediterranean region (Figure 36).

Figure 36. Percentage of households by severity class of the Coping Strategy Index, disaggregated by region

Region	Normal	Stressed	Moderate	Severe	Critical
Black Sea & Anatolia	1%	49%	37%	13%	
Istanbul	1%	31%	46%	22%	
Marmara & Aegean	1%	35%	43%	20%	1%
Mediterranean	2%	36%	41%	21%	0%
South-east	4%	51%	33%	11%	0%
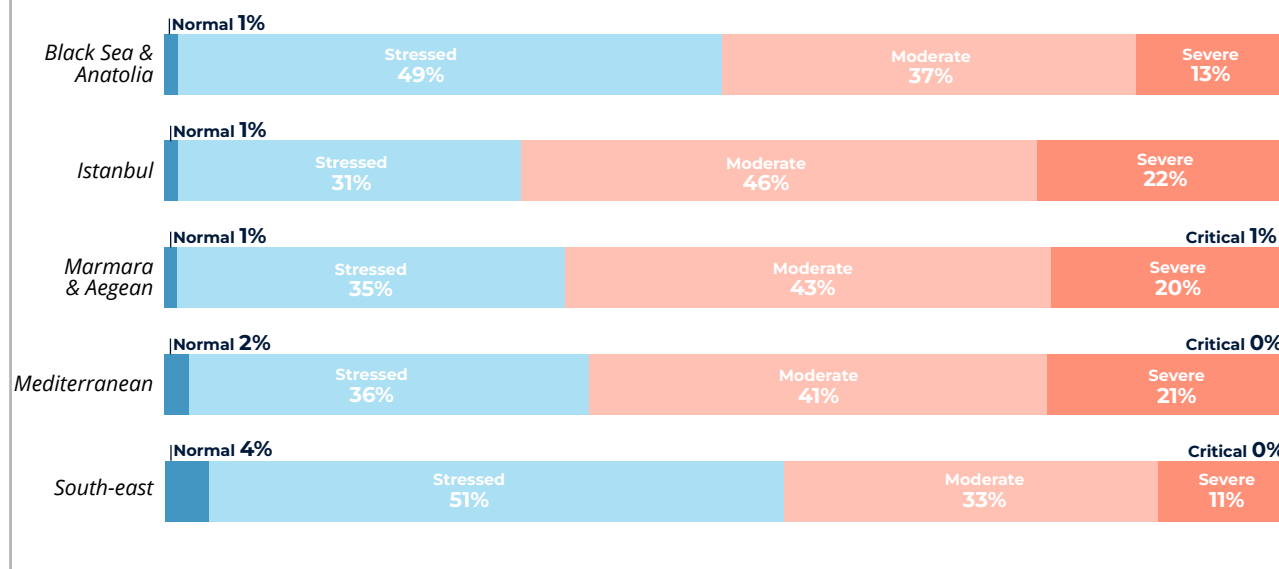
Both ineligible and eligible households engage in negative coping strategies. Half of ineligible households fall in the moderate and severe categories of the index, compared with 59 per cent of ESSN recipients and 55 per cent of C-ESSN recipients. This demonstrates that, although ineligible households have better living standards (see section above: 17 per cent have decent living standards, and 56 per cent are stressed), they still need to rely on negative coping strategies to maintain these living standards (Figure 37).

Figure 37. Percentage of households by severity class of the Coping Strategy Index, disaggregated by affected groups

Group	Normal	Stressed	Moderate	Severe	Critical
C-ESSN	4%	41%	39%	16%	0%
ESSN	1%	39%	40%	19%	0%
Ineligibles	4%	46%	37%	13%	0%
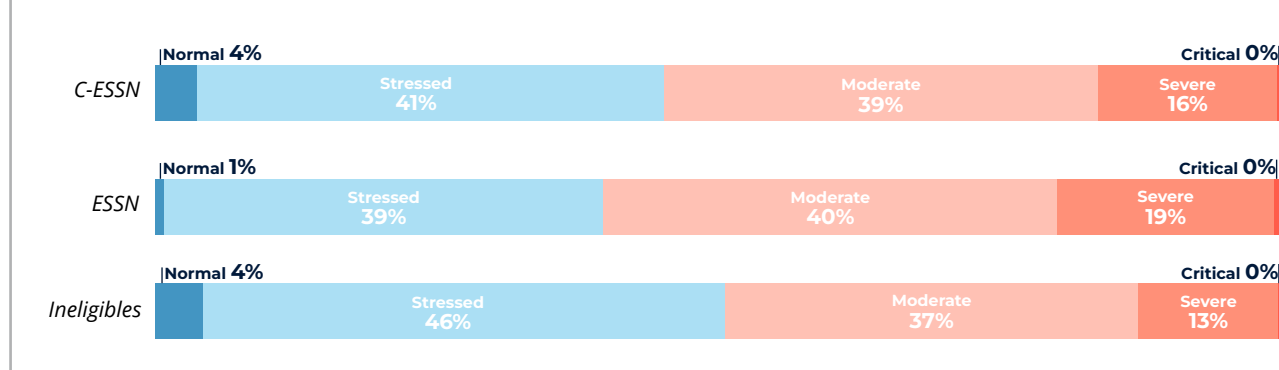
Unsurprisingly, 30 per cent of the non-vulnerable households do not use any coping strategies, and 70 per cent are stressed. On the other hand, only 2 per cent of the highly vulnerable are stressed, and 72 per cent fall in the severe and critical classes of the index (Figure 38).

Figure 38. Percentage of households by severity class of the Coping Strategy Index, disaggregated by vulnerability status

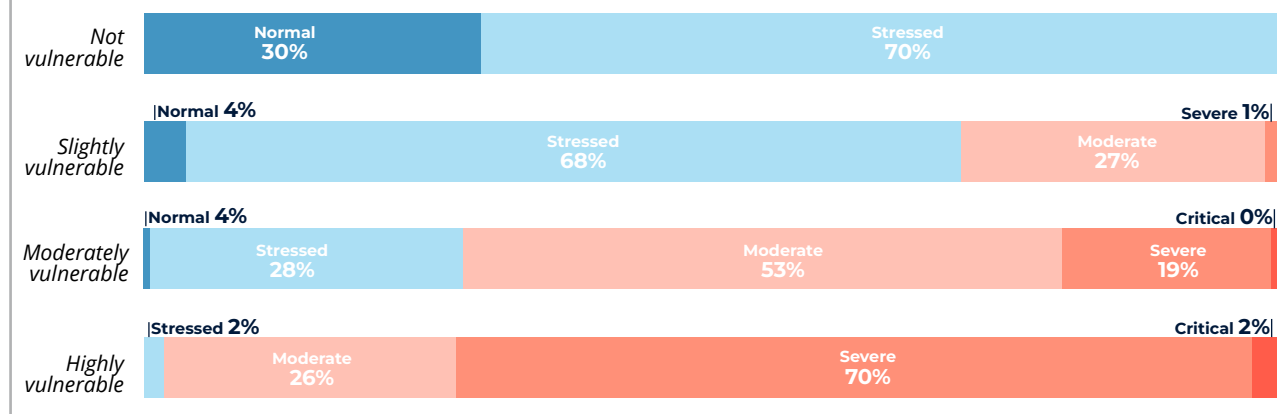| Vulnerability status	Severity classes				
Not vulnerable	Normal 30%	Stressed 70%			
Slightly vulnerable	Normal 4%	Stressed 68%	Moderate 27%	Severe 1%	
Moderately vulnerable	Normal 4%	Stressed 28%	Moderate 53%	Severe 19%	Critical 0%
Highly vulnerable	Stressed 2%	Moderate 26%	Severe 70%	Critical 2%	

Reduced Food Coping Strategy Index

The reduced Food Coping Strategy index (rCSI) is at its highest historical level for both eligible and ineligible groups, demonstrating how price increases of the food basket are pushing both groups to rely increasingly on food-based coping strategies. Compared with IVS-1, the rCSI rose by 30 per cent for eligible households and by 35 per cent for ineligible households (Figure 39).

The use of food coping strategies across regions is significantly different, with the highest rCSI score in Istanbul and the Marmara and Aegean region. The lowest scores are found in the South-east region.

Figure 39. Evolution of rCSI score over time (June 2020 to July 2022)
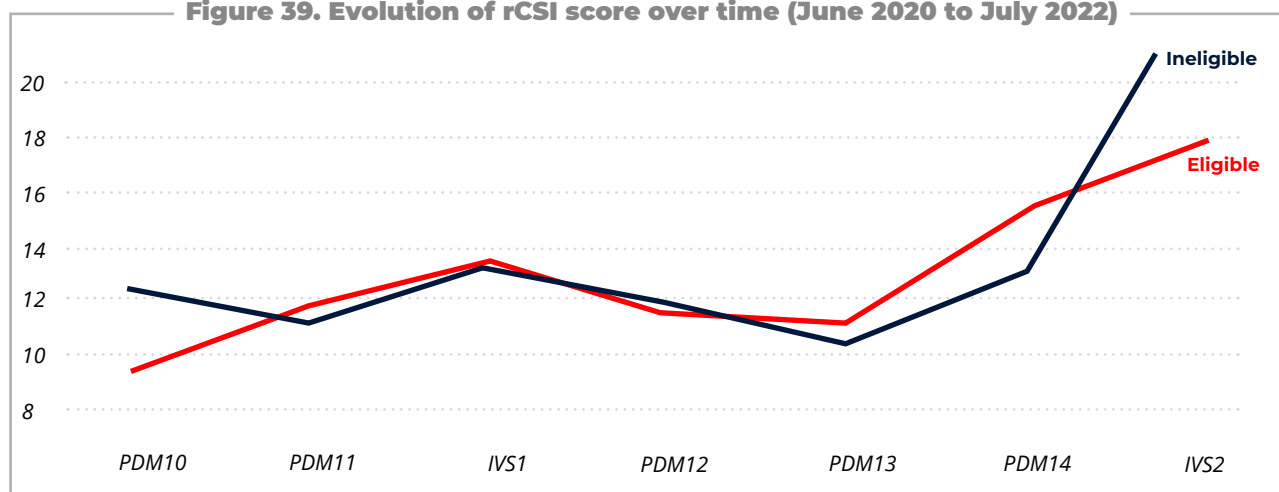
Relying on less preferred or less expensive food was the strategy most frequently adopted by ESSN recipients (87 per cent), non-recipients (82 per cent) and C-ESSN recipients (81 per cent). After a slight improvement from September 2020 to December 2021, the percentage of households relying on less preferred food is now increasing again and back to pandemic levels. PDM data show similar results, with 74 per cent of respondents opting for less preferred or cheaper food (ESSN, September 2022).

Other coping strategies used all week and reported during IVS-2 include reducing the portion size of meals (27 per cent of households), reducing the number of meals eaten per day (27 per cent) and restricting adult portions (23 per cent). Only 4 per cent borrow food or rely on help from relatives seven days a week. Overall, the proportion of ESSN households engaging in negative food coping strategies is slightly higher than the proportion of C-ESSN recipients or ineligible households (Figure 40).

Figure 40. Percentage of households using negative food coping mechanisms by number of days per week
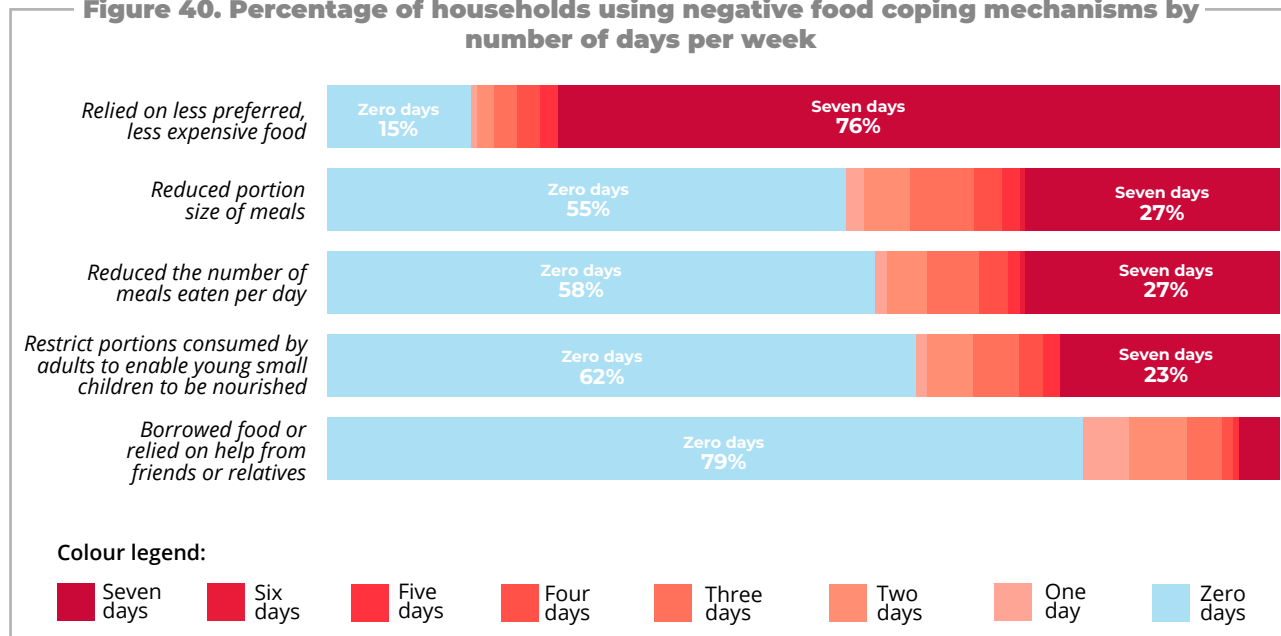
Ninety-four per cent of highly vulnerable households reported they relied on less preferred or less expensive food all week long, compared with nearly one-third of non-vulnerable households. Highly vulnerable households are more likely to use the full spectrum of negative food coping strategies, including 16 per cent who reported being fully dependent on food or help provided by friends or relatives. Non-vulnerable households, on the other hand, never have to restrict adult portions, or rely on help from friends. Exceptionally, some non-vulnerable households would reduce the size of the meals or reduce the number of meals per day (Figure 41).

Figure 41. Percentage of households using negative food coping mechanisms (days per week), disaggregated by vulnerability status
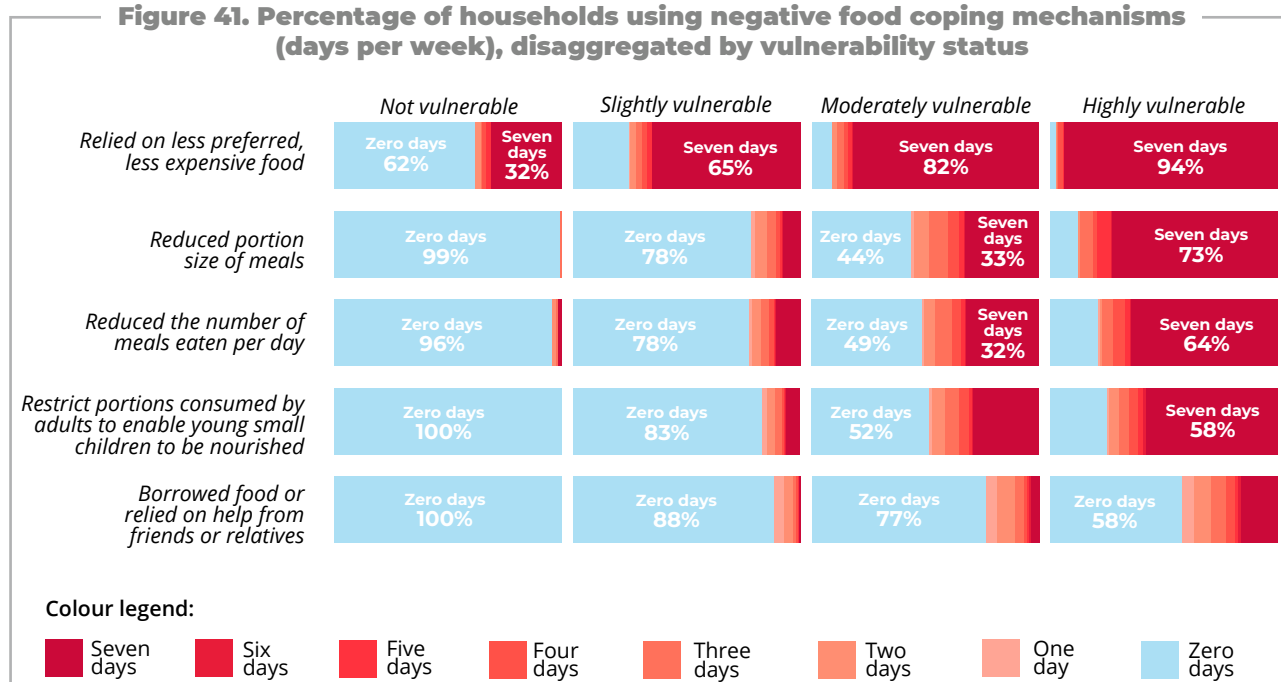
Livelihood coping strategies

The severity of the livelihood coping strategies adopted by refugees in Türkiye has reduced slightly over the last year and is currently greater for non-recipients compared with recipients (Figure 42).

Figure 42. Average LCSI scores across studies (June 2020 to July 2022)
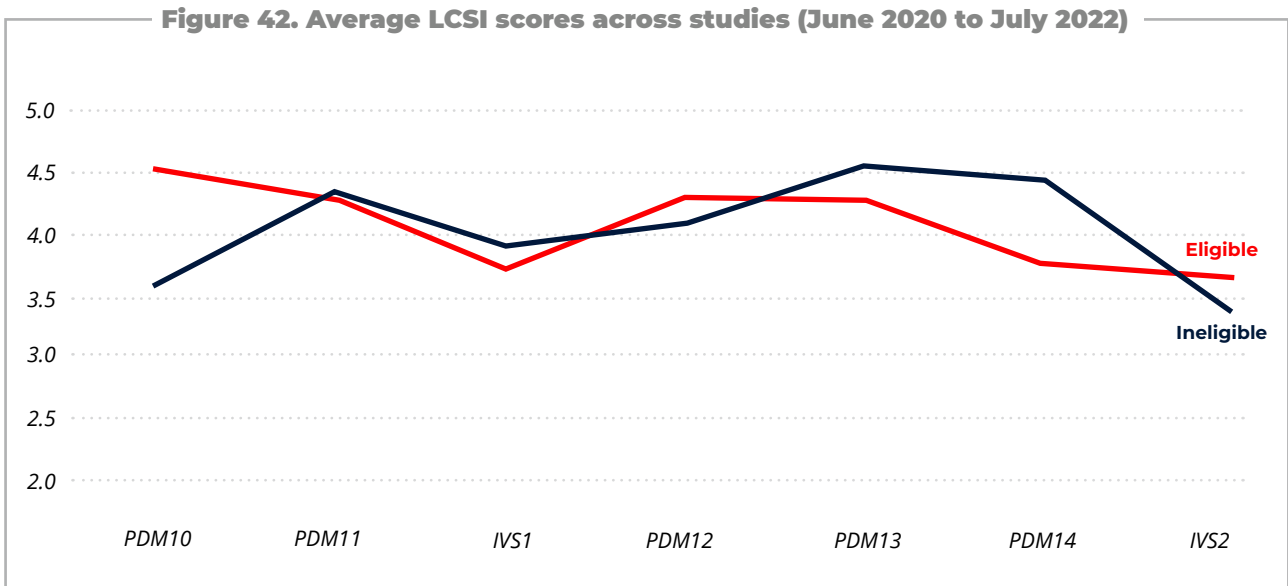
Buying food on credit (66 per cent), borrowing money from non-relatives (64 per cent) and selling productive assets (45 per cent) are the most frequently used strategies across all groups. Recent PDM data also show that buying directly from shops on credit is the main livelihood strategy (_ESSN_, August 2022). The types and proportions of livelihood coping strategies used by refugees are similar across regions.

Highly vulnerable households use negative coping strategies more frequently than any other groups, including buying food on credit (84 per cent compared with 20 per cent of non-vulnerable households), borrowing money (71 per cent vs 31 per cent of non-vulnerable households) and selling productive assets (60 per cent vs 4 per cent of non-vulnerable households). Other coping strategies include reducing non-essential expenditure (15 per cent; an additional 12 per cent report they are unable to use this coping strategy any more), selling households goods or assets (19 per cent; an additional 8 per cent report they have exhausted this possibility), removing children from school (18 per cent) and involving children in income-generating activities (12 per cent).

PHYSICAL AND MENTAL WELL-BEING

This section summarizes the physical and mental ability of the interviewed households to carry out their daily activities. The Physical and Mental Well-Being Index is calculated based on three values. The first is a measure of disability, using a household-level adapted version of the Washington Group on Disability Statistics question sets. The two other measures are proxies for the general mental state of households. One indicator is related to the social integration of the household and based on household members' written and spoken level of Turkish. The second indicator is a measure of stress tested during IVS-1, based on households' self-rating of their ability to meet basic needs.[12] The Physical and Mental Well-Being Index is a sub-index of the overall severity index used in IVS-2. Since the indicators composing the index are entirely different from the ones included in IVS-1, no comparison is proposed between IVS-1 and IVS-2.

- Physical and mental health difficulties continue to be relatively present in the daily lives of refugee households, mostly among children and women. One in four households reported having at least one person with difficulties carrying out daily activities, due to physical or mental problems, with the highest proportions found in the Mediterranean region and in the Marmara and Aegean region, where the refugee population is generally older. Nine per cent of households include at least one person living with a mild or severe form of disability ("a lot of difficulties" or "cannot carry out daily activities at all"). Of those, 79 per cent suffer from physical disability, 19 per cent from mental disability and 2 per cent from both. The likelihood of mental problems is higher in children (22 per cent) compared with adults (18 per cent), and mental health issues are more frequent in girls (23 per cent) compared with boys (16 per cent). The burden of disability is very high among vulnerable households, with nearly half of these having disabled members, compared with only 7 per cent of non-vulnerable households.

- Nearly 70 per cent of respondents indicated that one of their household members had been sick in the 30 days prior to the survey. Ninety-seven per cent reported they were able to access healthcare, and only 2 per cent reported the service received did not meet their needs, indicating very good access to healthcare. Those who lacked access struggled mostly with the cost (healthcare and transportation) but also with the quality of services and due to language barriers.

- Regarding social interaction incidents, 7 per cent of households interviewed reported they had suffered from verbal or physical assaults, a very similar finding to IVS-1 and in line with the existing literature showing generally good cohesion between refugees and host communities.

- When asked about their current and forecast well-being, non-vulnerable households mostly project an improvement, while the most vulnerable households mostly project a worsening of their situation.
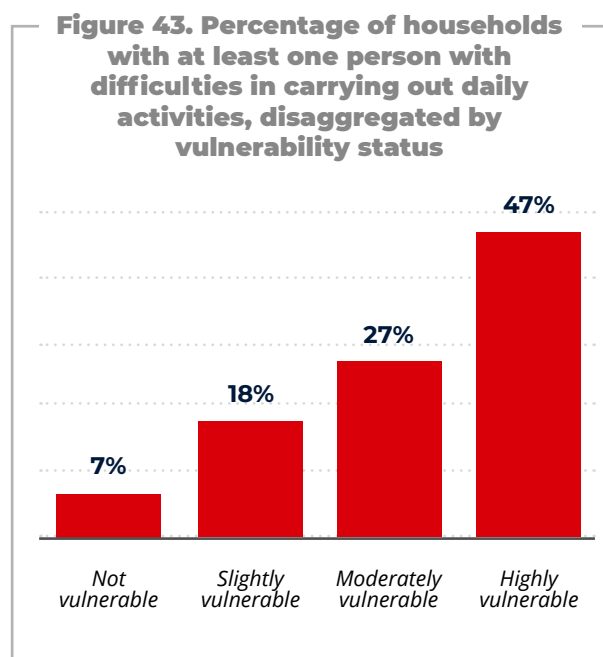
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12 • Psychosocial measures of stress were tested during the IVS-2 pilot but discarded due to their sensitivity for the refugee population.

Physical and mental disability

Twenty-five per cent of households interviewed reported having at least one person with difficulties carrying out daily activities due to a physical or mental health problem, an increase of three percentage points compared with IVS-1. High variations between regions are observed. The proportion of households with at least one member living with physical or mental disability rises to 32 per cent in the Mediterranean region (most likely due to its older population), 30 per cent in the Marmara and Aegean region and 27 per cent in Istanbul, compared with 13 per cent in the Black Sea and Anatolia region and 23 per cent in the South-east.

Forty per cent of C-ESSN households have at least one member living with physical or mental disability, compared with 22 per cent of ESSN households and 20 per cent of ineligible households. This matches the results expected, as C-ESSN recipients include households with people suffering from disabilities and households composed only of people aged over 60 and under 18 years old. C-ESSN households are more likely to include older people, who are more likely to suffer from disabilities.

Only 7 per cent of non-vulnerable households have at least one member with physical or mental disability, compared with 47 per cent of highly vulnerable households. Highly vulnerable households consider 9 per cent of their members to have a mild or severe disability, compared with only 1 per cent of the non-vulnerable. This highlights the excessive burden that disability places on households, as well as the negative consequences on living standards and the severity of the coping strategies adopted (Figure 43).

Figure 43. Percentage of households with at least one person with difficulties in carrying out daily activities, disaggregated by vulnerability status

Overall, 95 per cent of all the individuals comprising the IVS-2 sample can perform daily activities without any difficulties. Three per cent have some difficulties; 1 per cent have many difficulties; and 1 per cent cannot do it at all. However, 9 per cent of households include at least one person with a mild or severe form of disability ("a lot of difficulties" or "cannot carry out daily activities at all"). Of these, 79 per cent suffer from physical disability and 19 per cent from mental disability. Two per cent suffer from both. The likelihood of mental health problems is higher in children (22 per cent) than in adults (18 per cent), an inversion of the results compared with IVS-1 and a likely consequence of COVID-19 restrictions also observed in other countries. Mental health issues are more frequent in girls (23 per cent) than in boys (16 per cent). Literature shows that, among refugees, women and children are usually more prone to mental health disorders due to gender-based and domestic violence, which occurred during the Syrian war or in temporary shelters, and due to a lack of healthcare (*Kahiloğulları et al.*, November 2020; *Cloeters and Osseiran*, January 2020) (Figure 44).

Figure 44. Percentage of individuals reported with mild or severe disabilities, disaggregated by age group and gender
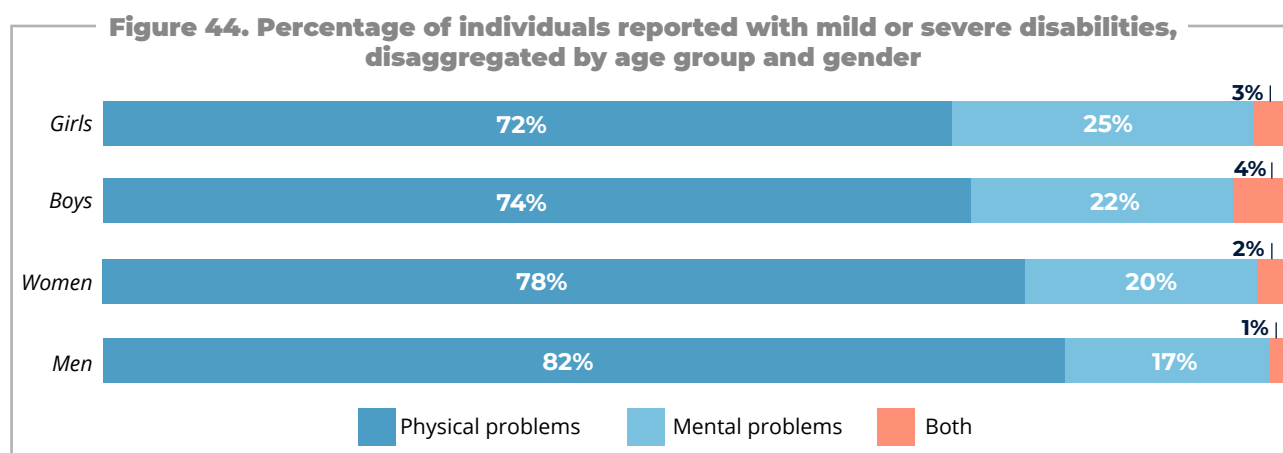
Sickness and medical care

Sixty-nine per cent of households reported that at least one of their members had been sick in the last 30 days and was in need of medical attention, without any significant differences between eligible or ineligible households. Percentages obtained from IVS-1 in 2021 were very similar. Families in the Mediterranean region (where the highest proportion of individuals above 60 years old is found) report more illnesses (74 per cent) compared with households in Black Sea and Anatolia (65 per cent) or Istanbul (67 per cent). Highly vulnerable households reported needing medical attention more frequently (73 per cent) than non-vulnerable households (56 per cent).

Of those who needed medical assistance, 98 per cent reported that they were able to access healthcare and 2 per cent that they were unable to do so. The main reasons reported for not being able to receive medical attention were the cost of medical assistance (34 per cent), the poor quality of the assistance available (25 per cent, mentioned only by Syrian households and no other nationalities), the cost of transportation (10 per cent) and the language barrier (7 per cent). Refugees under international protection (and not covered by universal healthcare) were more likely not to receive medical care (e.g., Iranians, Azerbaijanis and Afghans) compared with those under temporary protection. Regarding the language barrier, recent surveys have shown that, while many hospitals host interpreters who speak Arabic, interpretation is not available for languages such as Persian, Dari or Pashto. In addition, medical appointments are mostly booked over the telephone, while call centres operate almost exclusively in the Turkish language (*ESSN*, May 2022; *AIDA*, May 2021). Of those who received medical attention, only 4 per cent declared it did not meet their needs, with a higher rate in the Mediterranean region (5 per cent, compared with 2 to 3 per cent in other regions). A higher proportion of highly vulnerable households were unable to receive medical assistance (5 per cent) compared with non-vulnerable households (2 per cent).

COVID-19 vaccination

Seventy-six per cent of household members above 12 years old were vaccinated against COVID-19. While the vaccination ratio is lower among ESSN recipients (74 per cent), it is higher among non-recipients (80 per cent). Vaccination prevalence was lowest in the Mediterranean region (72 per cent). Those who were not vaccinated mostly reported believing that the vaccination had side effects (32 per cent), that they did not need to get vaccinated (20 per cent) or that their children were too young (19 per cent) as reasons for not getting vaccinated. These findings are supported by an ESSN survey from May 2021, which revealed that 53 per cent of respondents did not want to get vaccinated. Among those, 28 per cent did not want to receive a vaccine due to lack of trust or hesitancy, and 58 per cent because they did not believe it to be necessary (*ESSN*, 18 May 2021).

Verbal and physical assaults

Ninety-three per cent of households had not experienced verbal or physical assault in the three months preceding the interview, and 90 per cent had never heard of this type of incident in their neighbourhood. This corresponds with the findings of the secondary data review conducted by the IFRC in 2022 regarding social cohesion between refugees and host communities, which shows that refugees are generally well integrated in the country, with very few incidents overall (*ESSN*, May 2022). These findings are quite similar to those of IVS-1, where 8 per cent of households reported incidents.

Four per cent of households reported having rarely experienced assault (up to once every month), 1 per cent sometimes (about once every two weeks), 1 per cent often (once every week) and 1 per cent very often (twice a week). The proportion of violence reported is nearly double in Istanbul and the Marmara and Aegean region compared with the Black Sea and Anatolia and South-east regions, a finding similar to IVS-1 in 2021. The region with the least reported violence is the Mediterranean region. Highly vulnerable households report suffering more frequently from verbal or physical assaults (9 per cent) compared with non-vulnerable households (3 per cent) (Figure 45).

Figure 45. Percentage of households indicating experiencing verbal or physical assault in the last three months, disaggregated by region

Region		
Black Sea & Anatolia	94%	4%
Istanbul	89%	5% 3%
Marmara & Aegean	90%	6%
Mediterranean	97%	
South-east	93%	4%
Grand total	93%	4%

Colour legend:

- ■ Very often (twice a week or more)
- ■ Often (once every week)
- ■ Sometimes (once every two weeks)
- ■ Rarely (once every month)
- ■ Never (not once in the last 3 months)
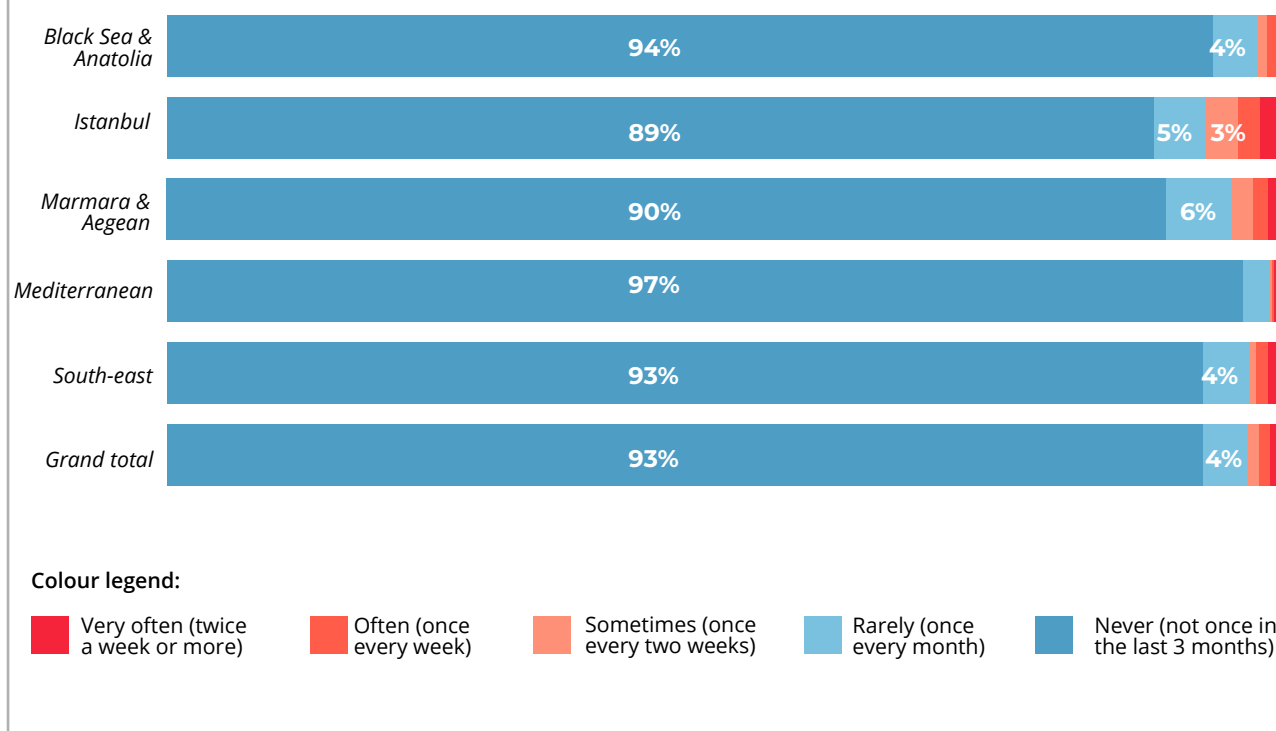
Twenty-one percent of assaults were physical, 56 per cent were verbal, and 23 per cent included both types. Physical assault is more frequently reported in the Black Sea and Anatolia and Mediterranean regions (46 per cent) compared with other regions (41 to 43 per cent). Non-eligible households face slightly fewer assaults than eligible recipients, probably because they are less exposed and better integrated. However, 56 per cent of the highly vulnerable reported having suffered from physical assaults in the three months preceding the survey, compared with only 11 per cent of the non-vulnerable (Figure 46).

Figure 46. Percentage of households experiencing assaults in the last three months by type, disaggregated by vulnerability status

Status			
Not vulnerable	89% Verbal assault		11% Both
Slightly vulnerable	60% Verbal assault	18% Physical assault	22% Both
Moderately vulnerable	58% Verbal assault	20% Physical assault	22% Both
Highly vulnerable	33% Verbal assault	29% Physical assault	27% Both
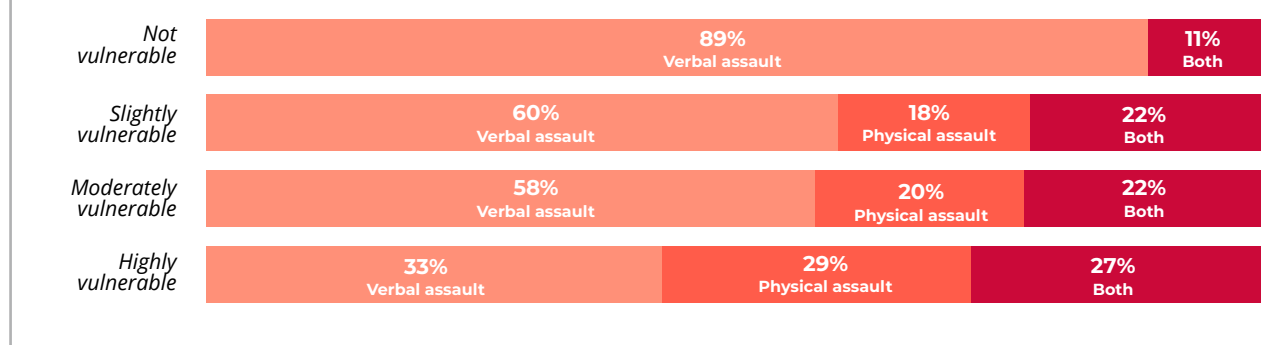
Subjective well-being

Households interviewed were requested to rate their overall well-being at the time of the interview and their forecast well-being in a year's time. They were requested to position themselves on a ladder or scale of ten levels, with 0 being the worst possible situation and 10 being the best. Results were then recorded from "dreadful" to "difficult", "acceptable" and "perfect".

As highlighted previously, the results show how the current conditions have deepened the inequalities between least and most vulnerable, but also how this influences their perception of the future. The general trend is for households living in good conditions to project an improvement and for households in worse conditions to project a worsening of their situation. This is particularly the case in Istanbul (12 percentage points increase reported for the category "dreadful"), the Marmara and Aegean region (10 percentage points increase) and the Mediterranean region (9 percentage points increase). There are no significant differences in results between eligible and ineligible people, although

the variations reported by ineligible households seem to be less steep at the extremes when compared with eligible households, suggesting less fear of dramatic changes and greater resilience.

Highly vulnerable households are generally pessimistic about the future and rarely project any improvement. While 54 per cent of the most vulnerable report being in a terrible situation at the time of the interview, the proportion increases to 60 per cent when projecting for the following year. Non-vulnerable households are more optimistic about the future; 55 per cent report they should be in an "acceptable" to "perfect" situation next year, compared with 30 per cent considering themselves in such situations at the interview date. Of particular concern are the moderately vulnerable households. While the lower segment might be able to improve their conditions and "jump down" one category into the "acceptable" class, the higher segment is worried that their conditions might worsen. The percentage of households in the "dreadful" category is projected (by the households themselves) to increase by 8 percentage points (Figure 47).

Figure 47. Percentage of household self-rated general well-being, current vs in one year's time, disaggregated by vulnerability status
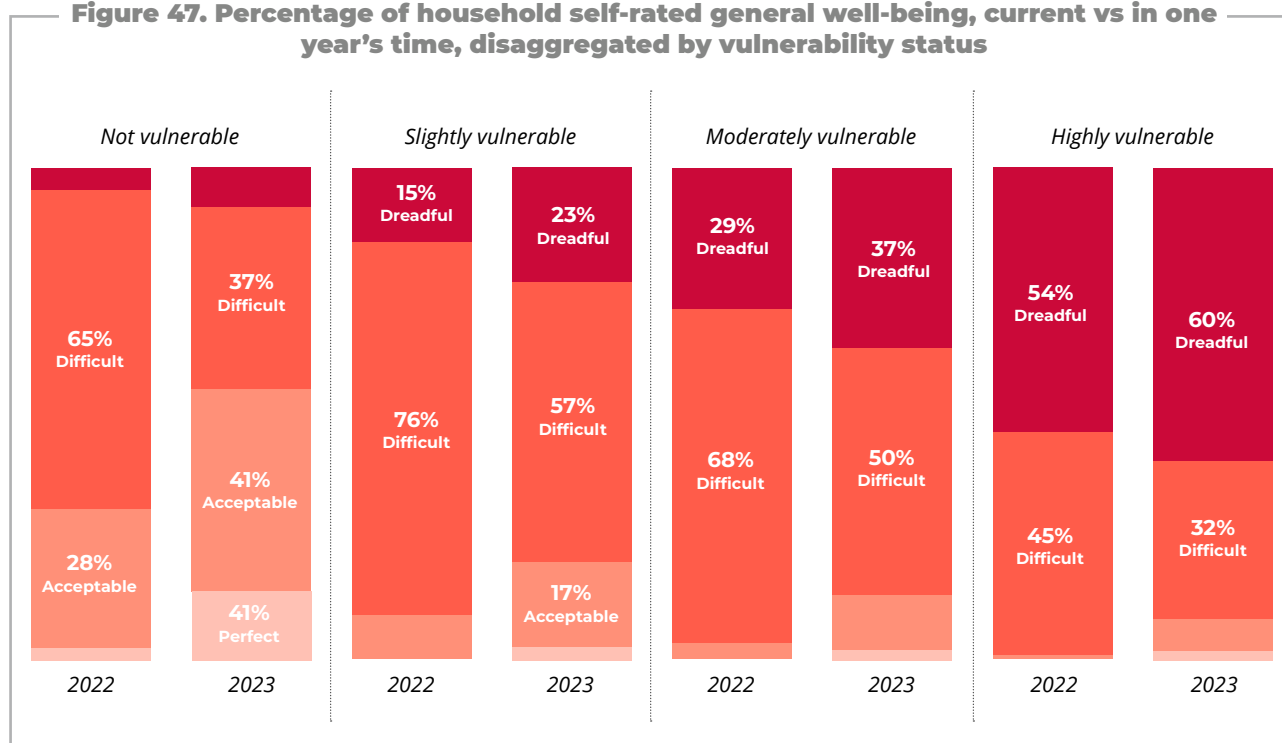
4. PRIORITY NEEDS AND PREFERRED INTERVENTIONS

- Similarly to the IVS-1 findings, respondents identified housing (ability to access good-quality housing or sustain rent costs over time), food and energy as priority issues in 2022. However, food concerns are more important this year than in 2021, a consequence of the high prices of the food basket and its major share of household expenditure.

- Cash transfer is by far the most preferred type of intervention, a logical finding in a situation where income levels are the main driver of humanitarian conditions and vulnerability.

IVS-2 respondents were requested to rank the issues of greatest concern to them. Housing (the ability to rent good-quality housing or to sustain rent costs over time), food and energy were overwhelmingly identified as priority issues across the five regions assessed. The ranking has changed compared with the 2021 IVS results, which placed food in third place, after housing and energy, indicating that food commodity prices are a greater concern this year.

Similarly to the IVS-1 findings, there is no significant variation of priority results depending on eligibility status or even respondent gender. Housing in 2022 is more frequently mentioned as a priority in Istanbul and the Mediterranean region, most likely due to higher rental prices. Food is ranked as the first priority in the Black Sea and Anatolia region. Even households who are not considered in need have prioritized housing as a key issue. These results appear logical, as together these three items represent 64 per cent of households' monthly expenditure. Communication, transport and healthcare needs are the least prioritized issues. Clothes were also prioritized more frequently in the South-east region, which stands out as the region where households spend the least on clothes compared with other regions, most likely to prioritize other basic goods or services (Figure 48).

Figure 48. Priorities as expressed by the assessed population[13]

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13 • Priorities in IVS are calculated using the Borda count methodology. A darker red colour in the heat table indicates a higher priority level given by respondents.

When asked which type of assistance would best support households in meeting their current needs (without mentioning what options are available), the response was overwhelmingly cash assistance, followed by better services (Figure 49). No significant differences were detected between regions, eligibility status or respondent gender. However, highly vulnerable households tend to request more frequent cash assistance than non-vulnerable households, and the latter tend to favour better services. No details were gathered on the specific services requested, but the highly vulnerable prioritized education and healthcare issues slightly higher than other vulnerable groups.

Figure 49. Preferences as expressed by the assessed population[14]

	Not vulnerable	Slightly vulnerable	Moderately vulnerable	Highly vulnerable	Total
Cash					
Services					
In kind					
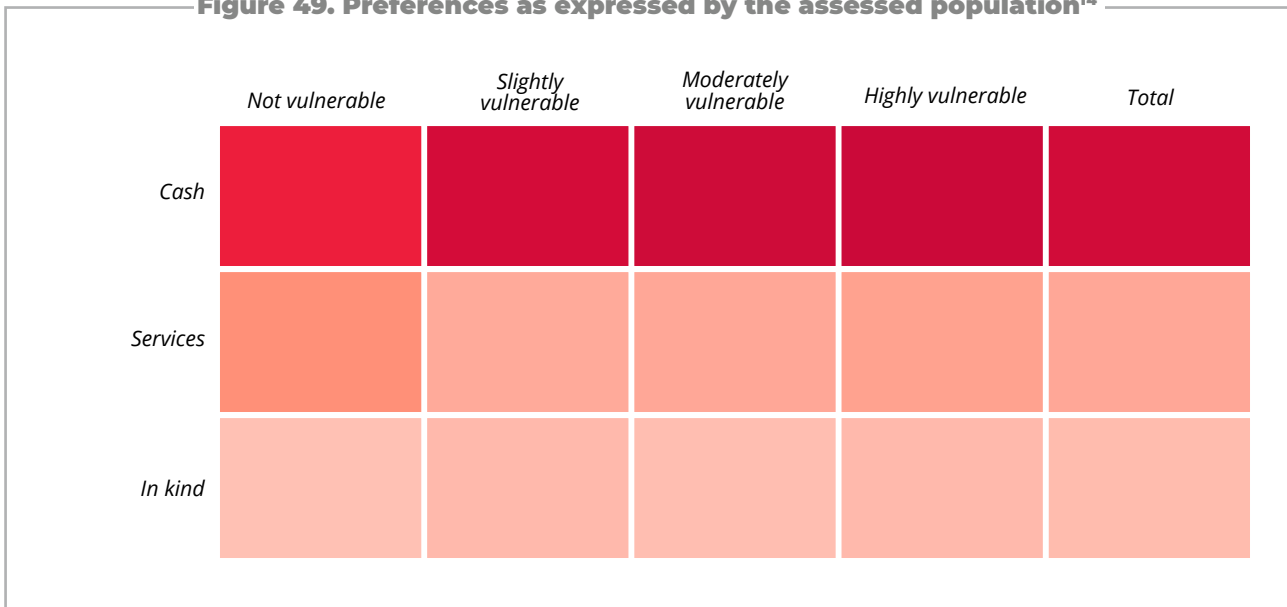
CONCLUSION

The economic situation in Türkiye in 2022 has caused difficulties for both eligible and ineligible refugee households, including high inflation and rising costs for basic necessities such as food, energy, rent and household items. Both eligible and non-eligible households have experienced an increase in median income due to government measures, including minimum wage increases, and have reported using various sources of cash income such as paid work, loans from friends or relatives, and cash assistance from the ESSN programme. Household debt levels have remained similar to 2021, with an average of two months' salary owed. Household expenditure has significantly increased over the past year, with nearly 80% of income being allocated to necessities such as food, shelter, energy, education and hygiene items. Education expenses have also increased due to the cost of sending children back to school after the COVID-19 pandemic. Overall, household expenditure has doubled compared to the previous year.

Study findings suggests that the majority of refugees in Türkiye are facing difficulties in meeting their basic needs. The ability to meet basic needs has slightly improved compared to the previous year, probably due to the end of COVID-19 restrictions and to wage increases. Most households live in bad-quality housing and rent their housing, with a small percentage owning their dwellings. A significant proportion of households share their home with other families, particularly in Istanbul and the Marmara and Aegean region. Electricity, separate kitchens, safe water, sanitation facilities and waste management are widely available, with non-vulnerable households generally having more durable assets. Only a small percentage of households reported being comfortable enough to meet their food, housing, energy, education and hygiene needs, which make up 80 per cent of average monthly expenditure. The majority of households can barely meet these five needs with their current income and tend to deprioritize food, education and energy expenses due to high rents for housing.

To maintain minimum living standards, refugee households increasingly resort to coping strategies. The proportion of households using these strategies has slightly increased over the past year. Food-related coping strategies are particularly common and are being used more frequently despite higher incomes due to high food prices. The most common food coping strategy is relying on less preferred or less expensive food, followed

by reducing the portion size of meals, reducing the number of meals eaten per day and restricting adult portions. Highly vulnerable households are more likely to use negative coping strategies, such as buying food on credit, borrowing money from non-relatives and selling productive assets, compared to non-vulnerable households. Other coping strategies used by highly vulnerable households include reducing non-essential expenditure, selling household goods or assets, removing children from school and involving children in income-generating activities. The severity of livelihood coping strategies has slightly decreased over the past year and is currently slightly greater for non-recipients of assistance than recipients, possibly due to the positive effect of cash assistance received by recipients.

Physical and mental health issues are prevalent among refugee households in Türkiye, particularly among children and women. One in four households reported having at least one person experiencing difficulty completing daily activities due to physical or mental health problems, with higher proportions in the Mediterranean and Marmara and Aegean regions. Almost one in ten households have at least one person with mild or severe disability. The prevalence of physical disabilities is four times greater than that of mental disabilities. Mental health problems are more common among children than among adults, and more common among girls than boys. Highly vulnerable households are particularly affected by disability, with nearly half of these households having members with disabilities. Almost all respondents have access to healthcare. Lack of access to healthcare is mostly due to cost and transportation issues, as well as poor quality of services and language barriers.

The study shows that the proportion of people with severe or critical needs has reduced slightly since the end of the COVID-19 pandemic. The percentage of households facing severe conditions is nearly zero in IVS-2, indicating a normalization of extremes after the severe deprivations suffered by some refugee households during COVID-19. On the other hand, the proportion of refugees in stressed conditions has increased in comparison of IVS-1, and the proportion of respondents in normal conditions has decreased, most likely due to high inflation, soaring prices of basic commodities and increased expenditure.

RECOMMENDATIONS

The authors of this report make the following recommendations:

1. Continuously assess the vulnerability of refugees living in Türkiye to provide evidence-based support for their basic needs by:

a. Revising the ESSN criteria to include more vulnerable households to alleviate the severity of their conditions. Although the targeting criteria have recently been revised to cover more households, there is still a need to include more people in the programme. A comprehensive review of the ESSN assistance framework, particularly regarding targeting, is imperative to ensure that the most vulnerable are reached.

b. Implementing recurring cycles of additional ESSN payments as part of a comprehensive recovery plan to help households meet their basic needs. Many households struggle to make ends meet with their current income, and tend to prioritise housing over food, education and energy expenses. Seventy-nine per cent of households cannot afford the minimum expenditure basket in Türkiye. Implementing multiple cycles of additional payments, through both the ESSN (Social Assistance and Solidarity Foundation Discretionary Allowance) and other assistance programmes, is crucial to mitigate hardship amid the current economic deterioration.

2. Invest in education for long-term resilience and socioeconomic stability. Education levels and vulnerability status are closely related. Most vulnerable groups have only a primary school education or are illiterate, making it difficult for them to access job opportunities. Sixty-seven per cent of refugee households have school-age children, but some face the risk of not being able to send their children to school. The high cost of sending children back to school after COVID-19 (transport, books and stationery, uniforms, etc.) has prevented 11 per cent of households from doing so. Withdrawing children from school is a negative coping strategy, and 7 per cent of working individuals are children. Multiple approaches may be undertaken to address this issue, including the provision of Turkish language education, the dissemination of information, support for credential recognition for individuals with existing diplomas and offering guidance for those who have yet to complete their studies.

3. Prioritise food security to combat food-related negative coping mechanisms. Food-related coping mechanisms, such as relying on less preferred or less expensive food, reducing meal portions and eating fewer meals per day, are at an all-time high among ESSN and C-ESSN recipients and non-recipients. This puts people, especially children, at risk of health problems. In addition to the current cash assistance (ESSN, C-ESSN and Conditional Cash Transfer for Education), in-kind food and school feeding should be adopted to combat the inadequate intake of essential nourishment necessary for the proper growth, development and health of children.

4. Monitor the availability of affordable and safe housing to ensure proper living conditions. The study forecasts a 90 per cent increase in accommodation costs over the next six months, which puts added pressure on household expenses. A market analysis of rental housing in major cities should be conducted, and the results should be shared with refugees to ensure access to affordable and safe housing. The possibility of a major earthquake in Türkiye makes it crucial to consider the safety of housing.

5. Address the unique needs of non-Syrian refugees and provide appropriate support. Rising inflation will have a significant impact on the living standards of non-Syrian refugees, who, unlike Syrian refugees, are under international protection and have to pay for services. Access to health services is a particular challenge for non-Syrian refugees, and solutions that meet their needs should be implemented by working together with the relevant authorities.

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ANNEX 1. IVS-2 PROCESS AND METHODOLOGY

The following table describes the activities conducted for each step of the Intersectoral Vulnerability Study, as well as the main outputs.

	September–October 2021 **1. Design & planning**	December–July 2022 **2. Data collection & collation**	July–August 2022 **3. Data preparation & exploration**	September 2022 **4. Analysis & sense making**	October 2022 **5. Reporting & dissemination**
Activities	Definition of objectives and scope, audience, timeframes, depth of analysis, levels of precision	Sampling frame, geographical strata, household selection, replacement rules	Data cleaning and preparation, merge with historical data (PDM, IVS-1)	Descriptive analysis (group, summarize, compare)	Report, charts and maps
	Analytical framework design, data collection and analysis plan	Questionnaire design, piloting, translation	IVS severity index transformations and calculations	Explanatory analysis (correlation, association)	Technical notes, documentation, methods, limitations and caveats
	Severity index indicator selection and aggregation plan	Enumerator training (31 people)	Exploratory analysis (patterns, outliers, trends)	Interpretative analysis (severity profiling, uncertainty, priorities)	Uncertainty communication
	Definition of end products, report template	Data collection (20 Dec. 2021 to 23 Jul. 2022) – 3,580 households interviewed	Secondary data review coding (DEEP)	Anticipatory analysis (risks, scenario, projections, updated priorities)	Safe storage and archiving
	Identification of structured analytical techniques	Secondary data review (DEEP)	Preliminary results and hypotheses, identification of meaningful comparisons	Prescriptive analysis (operational recommendations)	Lessons learned workshop
	Planning, resources and contingencies	Safety and data protection procedures/ measures	Identification of information gaps and strategies to fill them		Presentations, dissemination
Outputs	IVS-2 terms of reference	Sampling plan	Final IVS-2 dataset	Interpretation sheets	Dissemination plan
	Analysis framework	Questionnaire	Preliminary findings and hypotheses to confirm later	Joint analysis workshop results	IVS-2 report and presentations
	Data collection and analysis plan	DEEP repository of secondary data	Disaggregation plan	Key messages	Lessons learnt
	Report template	Training materials	Information gaps list, further research focus list	Problem trees	
		IVS-2 dataset	Assumption checklist	Vulnerability profiles	

ANNEX 2. IVS-2 SEVERITY AND VULNERABILITY INDEX

This annex details the process that led from the original variables to the final severity index. The IVS severity index is a hierarchical composite measure that combines three sub-indices of living standards (LS), coping strategies (CS) and well-being (WB). The index builds on eight indicators, distributed across the three pillars as shown in Figure 50.

Figure 50. IVS severity index structure and indicators

SEVERITY OF HUMANITARIAN CONDITIONS		

LIVING STANDARDS	COPING STRATEGIES	PHYSICAL AND MENTAL WELL-BEING
Durable household item ownership · Expenditure based poverty · Dependency ratio	LCSI · rCSI	Disability status · Turkish language (proxy social integration) · Ability to meet basic needs (proxy stress)
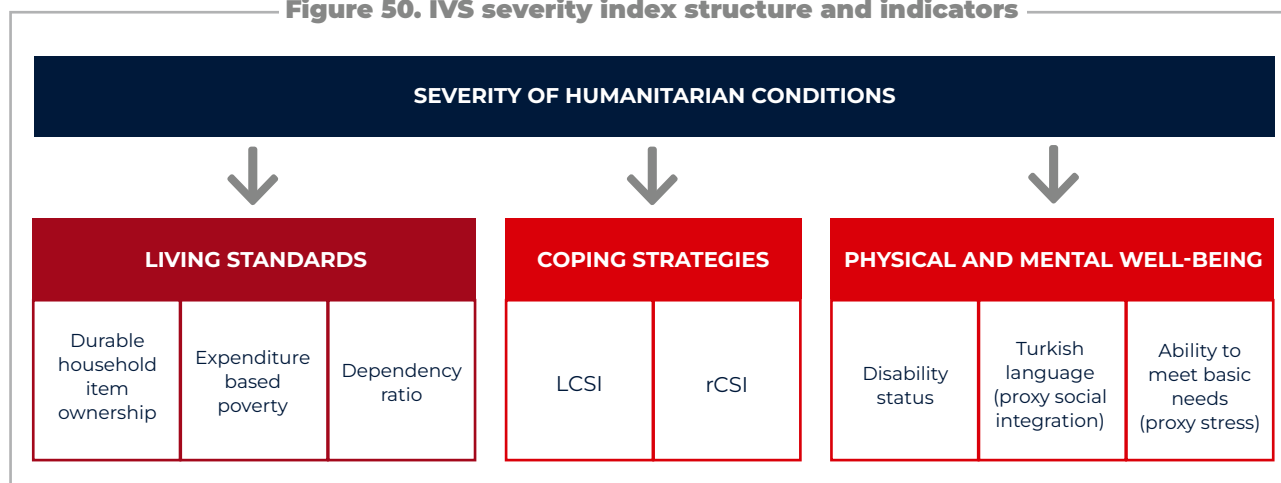
To produce the index, three types of operations were undertaken:

• Transformations of individual variables into base-level indicators.

Transformations were of several types, depending on whether the variables to be transformed were numerical (positive continuous, counts, proportions) or categorical (dichotomous or ordinal). All transformed variables were given a negative orientation, i.e., higher values would make a bigger contribution to the severity of households' situation.

• Amounts (i.e., expenditure and dependency ratio) were rated to adult equivalents (square root of household size).

• Ordinal variables (i.e., level of Turkish and ability to meet basic needs) were transformed into ratio level measures.

• The two coping strategies scores were rescaled to the interval 0–1 by dividing them by their respective maximum.

• The 21 items comprising the durable household goods index were combined using an index-forming function known as the Desai–Shah method (Desai and Shah, 1988).

• Aggregation into sub-indices

The three indicators comprising the LS sub-index were aggregated using the mdepriv command (available in Stata and R) with equal weights (Alperin and Van Kerm, 2009). The same method was used to calculate the CS sub-index, although with a method that ensures equal contribution to the index. To calculate the physical and mental well-being sub-index (three indicators), the mdepriv function was also used; however, the Cerioli–Zani option within mdepriv (Cerioloi and Zani, 1990) was chosen to approximate the respective shares of both the Turkish language and the inability to meet basic needs indicators, as they express the mental strain of precarity and social isolation.

• Aggregation into the final severity score

This was calculated using the arithmetic mean of the three sub-index scores. No weighting scheme was used across sub-indices, and the contribution of the sub-indices is therefore proportional to their means. The density plot in Figure 51 makes it easy to see that the severity index distribution reflects the arithmetic mean of the sub-indices. The severity index is slightly right-skewed; its kurtosis approaches the normal distribution value (= 3).

Figure 51. Kernel density estimates of the IVS-2 severity index and its sub-indices

N = 3,574 households. Kernel = Epanechnikov, bandwidth = 0.03. Higher x-values express more severe conditions; a higher y-value indicates more observations around the x-value.
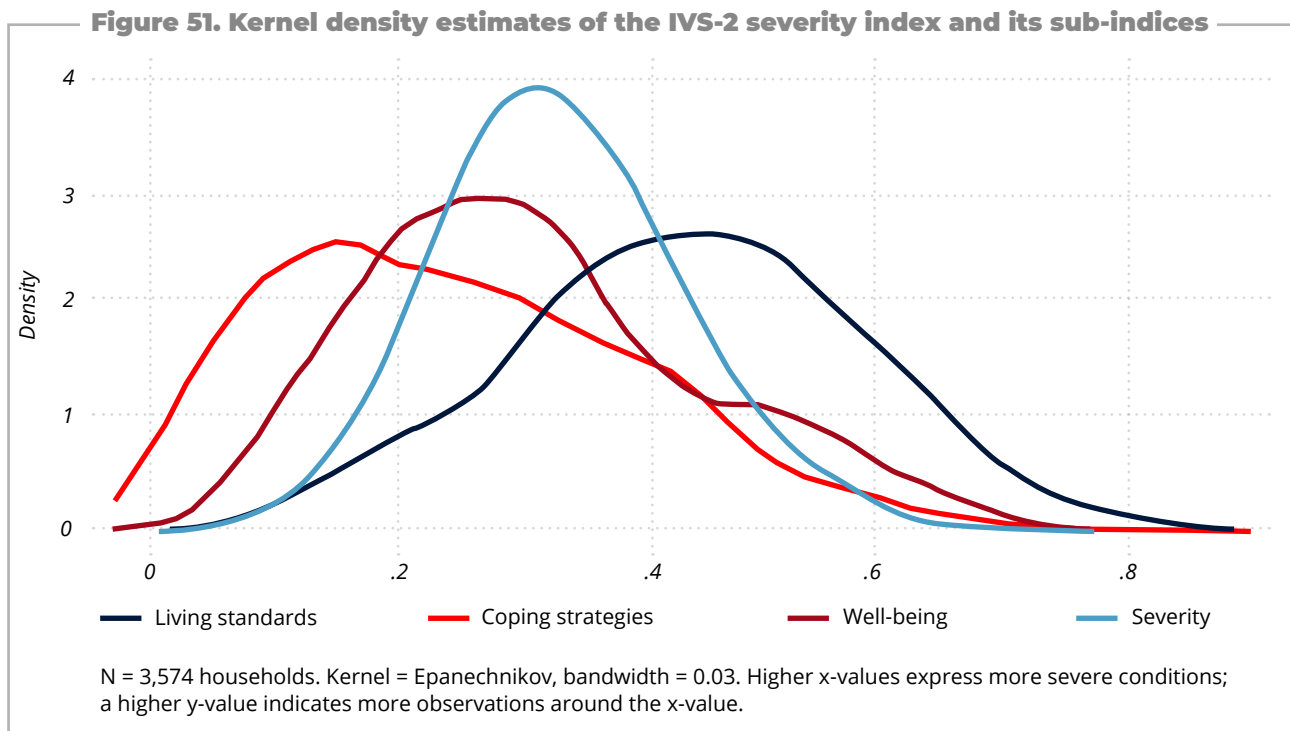
Severity scale

The final index values range from 0 to 1. The IVS-2 severity index enables the categorizing of households in five distinct severity classes: normal, stress, moderate, severe and critical. Each severity class is associated with a specific interval of 0.2 points of the index score. The scale in Figure 52, adapted from the joint intersectoral analysis framework, is used to define each severity class.

Figure 52. IVS-2 severity scale

0.0 - 0.199	0.2 - 0.399	0.4 - 0.599	0.6 - 0.799	0.8 - 1
1. Normal	2. Stress	3. Moderate	4. Severe	5. Critical
• Normal/acceptable living standards • No stressed or negative coping mechanisms adopted • No/low risk of impact on physical/mental well-being	• Medium living standards • Adoption of stressed coping mechanisms • Minimal impact on physical/mental well-being	• Low living standards • Adoption of negative coping mechanisms • Medium impact on physical/mental well-being	• Collapse of living standards • Adoption of crisis and/or irreversible coping mechanisms • High physical/mental well-being impact	• Total collapse of living standards • Coping mechanisms exhausted • Extremely high physical/mental well-being impact

Total population of interest

Affected population

Population in need

Households falling in the categories moderate, severe and critical are considered in need of external assistance.

The severity index is relevant for comparing the results of IVS-1 and IVS-2. Although some of the indicators comprising the index have changed, the concepts attached to each class are still comparable. In 2022, no critical/life-threatening conditions were identified, and only a few cases (10) fall in the severe class. While it is obviously good news and a slight improvement compared with 2021, this drastically reduces the number of classes – from five to three – and consequently the discriminatory power of the classification.

Vulnerability scale

According to severity scale categorization the scores are rescaled by dividing the index value by their observed maximum (0.731), multiplying by five and rounding up to the nearest integer. As only a few cases only fall in the fifth class ("critical"), the categories "severe" and "critical" are merged. This new classification is not an absolute severity classification, but rather indicates who is suffering more or suffering less from deprivation and the burden of physical and mental issues. From a programmatic point of view, and since economic conditions in Türkiye are expected to continue deteriorating, this new classification represents the vulnerability status of refugee households in the face of upcoming financial strain and challenges (see outlook section in the executive summary). The four classes are re-labelled "Not vulnerable", "Slightly vulnerable", "Moderately vulnerable" and "Highly vulnerable" (Figure 53).

Figure 53. Severity and vulnerability index
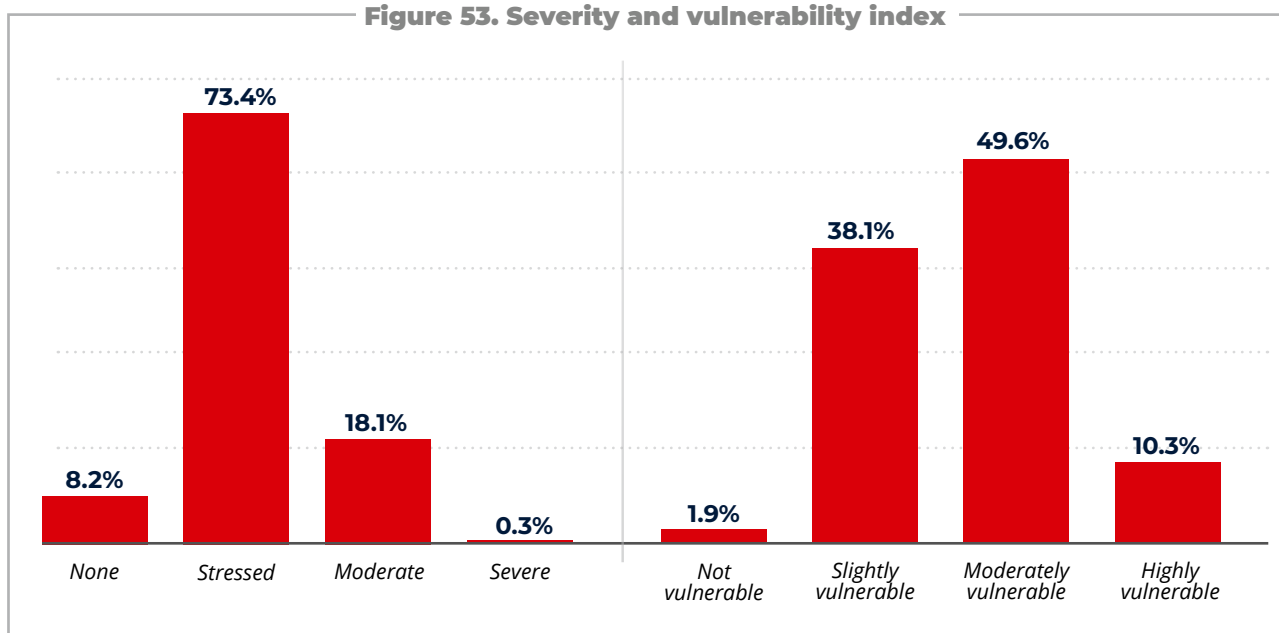
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ANNEX 3. IVS-1 PROBLEM TREE

IVS-1 problem tree and main findings

Priority regions

Severity of humanitarian conditions and vulnerability at similar levels across the five assessed regions.

Priority groups

In total, 2% of the refugee households who applied for assistance in Türkiye are estimated as not vulnerable, 38% slightly vulnerable, 50% moderately vulnerable and 10% highly vulnerable. ESSN recipients are slightly more vulnerable than C-ESSN. Vulnerability is strongly associated with the number of working-age members in households.

Priority issues

Shelter, food and energy are priority needs (64% of expenditure share). Prices of food and energy are expected to increase during the winter. Shelter rent will also increase as soon as contracts end. Cash assistance continues to be the preferred response by households.

Living standards – 13% of HHs face severe difficulties in meeting their basic needs, 47% moderate difficulties, 34% are stressed. Only 6% are always comfortable meeting their most basic needs. A slight improvement in meeting basic needs is observed compared with last year.

- 79% of HHs are below the MEB.
- 98% of HHs have no savings.
- 96% of HHs rent their homes and 59% reported living in poor-quality housing. 13% share their home with other families, especially in Istanbul (23%), and the Marmara and Aegean region (20%).
- Almost all respondents have access to electricity and safe water.
- Only 8% of HHs use an outside toilet.
- 97% of HHs have their waste collected by the municipality.
- 99% of HHS have access to electricity for lighting.

Coping mechanisms – Despite higher incomes, refugee households rely increasingly on negative food coping strategies. rCSI scores are at their highest historical level for all groups, especially in Istanbul and the Marmara and Aegean region.

- Compared with IVS-1, the rCSI rose by 30% for eligible HHs and 35% for ineligible HHs. Relying on less preferred or less expensive food, reducing the portion size of meals, reducing the number of meals eaten per day and restricting adult portions as the main food coping mechanisms.
- Buying food on credit, borrowing money from non-relatives and selling productive assets are the main livelihood strategies adopted.

Physical and mental well-being – 25% of HHs include at least one person with some difficulties (mental or physical). 9% of households include at least one person with a mild or severe form of disability ("a lot of difficulties'" or '"cannot carry out daily activities at all'").

- 79% of people with mild or severe disability suffer from physical problems, 19% from mental problems, 2% from both. Mental health difficulties are more prevalent among children and female members.
- 69% of HHs with at least one person sick in the past 30 days requiring medical care. 97% reported that they were able to access healthcare and only 4% reported the service received did not meet their needs, indicating very good access to healthcare. Those who lacked access struggled mostly with cost (care and transportation) but also due to the quality of services and language barriers.

Impact on people

- 86% of HHs with at least one member working. 7% of the working individuals are children. Low wages and difficult working conditions reported. 93% work informally.
- Median income moved from TRY 1,200 in 2021 to TRY 3,180 for ESSN recipients, and from TRY 1,800 to TRY 4,250 for non-recipients. C-ESSN HHs only report TRY 2,100 income per month. For all groups, the main source of income is paid work, followed by loans from friends or relatives.
- 72% of HHs have debts, especially the most vulnerable. Median HH debt is TRY 3,000.
- 98% of HHs do not have any savings.
- ESSN recipients spend a median of TRY 5,926 per month and non-recipients TRY 6,053. Most important increase in expenditure is food commodities (twice more over the last year). Food, rent, energy, education and hygiene items account for nearly 80% of expenditure.
- 11% did not send their children back to school after COVID-19. High increase of education expenditure due to the return to school.

Impact on services

- 116% annual increase for food basket price, from TRY 196 to TRY 423 (WFP, 23 Aug. 2022).
- 54% inflation from January to June 2022 for energy prices (electricity and gas) (TurkStat).
- Annual housing costs increase of 61% by April 2022.
- Transportation costs increased by 105% annually.
- Communication prices increased by 18% annually (TurkStat).
- MEB value increased from TRY 858 in Jan. 2022 up to TRY 1,083 in Jul. 2022.

Politics

- General elections set for 2023 with growing anti-migrant discourse.
- Increased voluntary repatriation and deportation (from 11% to 53% in 2021). Construction of houses in safe areas of Syria to relocate Syrians.
- Residency permit quotas adopted in Jul. 2022 restrict to 20% the maximum ratio of foreigners per area.
- Restriction on trips back to Syria for religious holidays (May and Jul. 2022).

Economics

- Despite COVID-19 restrictions, GDP went up by 11% in 2021.
- 80% annual inflation by Aug. 2022 (highest rate since 1998).
- TRY depreciation (27% loss against USD in 2022).
- Impact of war in Ukraine on oil/gas, food prices and tourism.
- Unemployment rate fell back from 13,7% in 2019 to 10,6% in 2022 (TurkStat).

Sociocultural

- Only 7% of refugee households have members who experienced physical or verbal assaults in the last three months. Increased social tensions due to political and media anti-migrant rhetoric.
- Host community concerns about refugees' impact on the economy.
- Language and work regulations limit refugees' integration. Only 48% of refugees speak intermediate/advanced level of Turkish language.

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