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# Employment of Blue-Collar Workers in Organized Retail Sector: The Case of Turkey

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## Abstract

This study provides an outlook on employability of blue-collar workers in the organized retail sector as a case study of Turkey. The employment conditions of blue-collar workers are different from the employment of the white collars. Internal and external factors affect development of organized retail sector. Besides working university students has an important share in the employment. The paper is organized in three chapters. Firstly, the development process and segmented structure of retail sector is discussed based on the Trade Law. The firms of organized and unorganized retail sector as commercial firms are subject to the Trade Law. The tradesmen firms have traditional structure and it has two sub segments such as TESK and informal sector. The basic characteristics in the employment of blue-collar workers are discussed and interpreted within the second chapter. The high turnover rate of blue-collar workers is a distinguishing feature. The paper is based on an analytical study. The main findings and recommendations are provided in chapter three. Organized retail sector is an area that needs to be investigated. Data are insufficient. The sources are publications of organized retail sector, legal complications and public research reports. Additionally, English and Turkish literature were surveyed.

**Keywords:** Turkey, organized retail sector, high turnover rate, blue collar workers

## Introduction

Starting with 1960's, it is observed that the share of the retail sector has increased in economic activities in Turkey. As the result of the social-economic development process, the structural transition from traditional retailing to organized retailing sector has started in Turkey in 1990s. This process was accelerated by the entry of international companies in Turkey's market by globalization (CSGB, 2017:14). Beside this rapid social-economic development of İstanbul which has important effects on Turkey's economic and social life.

The retail sector has segmented structure in Turkey. First distinction is based on Trade Law as commercial firms and tradesmen firms in the retail sector (Trade Law, 2011). The firms of organized and unorganized retail sector as commercial firms are subject to the Trade Law. The unorganized retail sector and tradesmen firms as the retail sector mainly consist of small privately–owned single stores that largely depending on family labor. Tradesmen firms have

taken place in the traditional retail sector. This sub sector has a dual structure as registered and unregistered. The registered part of traditional retail sector has been organized in the scope of

TESK (Confederation of Turkish Tradesmen and Craftsmen) by the Law No. 5362 in 2005. As of February 2020, while number of tradesmen and craftsmen was 1,693,357; the number of workplaces was 1,824,014 in the scope of Law No.5362 (TESK, 2020:1).

**Figure 1.** The Structure of Retail Sector in Turkey
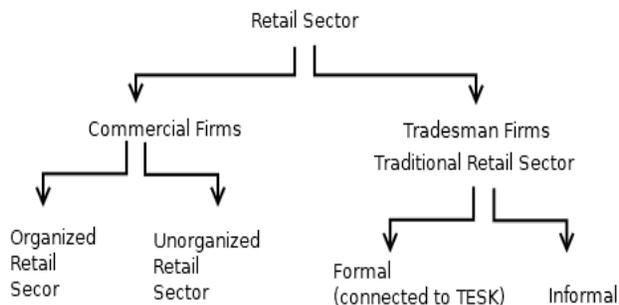


The unregistered part of traditional retail sector has the big share in the distribution of employment in the whole sector. The share of traditional retailers was 67%, while the share of organized retailers is 33% in 2018 (TAMPF,2018:1). In the unregistered traditional retail sector, the number of unregistered traditional firms and the rate of unregistered employment are unknown. Informality is widespread in economic activities and employment in Turkey. While the informal employment rate is 34,52% in Turkey, this rate is 22,55% in the service sector (SGK,2020:1) and the rate of informality is 20% in the retail sector. It has the second highest informal rate following construction sector (KPMG,2020/01:22). The segmented structure of retail sector in Turkey is described in the Figure 1 below.

**Literature Review**

Today, organized retail sector is undergoing a process of renewal and reconstruction. In spite of this, it is said that the share of the traditional retail sector in the food sector is 70% in total as the result of consumers' traditional consumption habits in Turkey (TAMPF, 2016:59). It is seen that shopping centers and national local chain markets provide a transition from traditional retail sector to organized retail sector in Turkey (KPMG, 2019:58). Working conditions were researched at national and local chain market by Ministry of Labor and Social Security (ÇSGB, 2017). Working conditions were researched at national and local chain market establishment by the inspector of labor in 2017. The results of research provide information about employment in organized retail sector in Turkey. It was applied a questionnaire in 17 provinces across Turkey by the labor inspector. In this context, 155,480 workers in 3005 market, 20292 stores owned by 177 employer were in the scope of this research. Working conditions were researched at national and local chain market establishment by this research. The results of research have provided information about the organized retail sector in Turkey. It can be accepted that the results of the research including national and local chain markets give an idea about the realities of the employment in the organized retail sector in Turkey. We can observe that the features of employment in the national and local chain market reflect the structural characteristics of employment in the organized retail sector in Turkey.

New structuring in the organized retail sector is also seen such as market type retailing at the fuel stations. It is emphasized that gas stations of fuel companies have turned into retail marketing points in Turkey. This change started in the 1990s in Turkey (Capital, 2021:1). The Oil Industry Association (PETDER) has nearly 13,000 dealers in Turkey and the fuel stations have turned into shopping centers where retailing has developed (PWC, 2017:11). The fuel distribution sector with the station network has important contribution to the employment in the organized retail sector. The direct contribution of the oil industry by the retail marketing points to the employment of organized retail sector is given in the Table 1 below.

**Table 1.** Contribution of the Oil Industry to the Employment of Organized Retail Sector

| Occupation | Number of workers |
|---|---|
| Distribution staff | 10000 |
| Station workers | 45000 |
| Station front line workers | 95000 |

*Source.* PWC, 2017

On the other hand, it is observed that satisfaction has been achieved regarding shopping centers. There is a strong trend that new shopping centers will not be opened after 2023 in Turkey (PWC, 2020: 28). It is anticipated that firm density in the sector will shift from the big cities to smaller cities and smaller settlements other then big cities. It is estimated that this shift and new structuring as market type retailing in the fuel station will create demand for blue collar workers in the small settlements. It is thought that shifting of retailing as economic activity will contribute to the employment of the workers in the local labor market. It will continue to the social-economic development of small settlements.

Globalization process as an external factor is affecting the future of organized retail sector and the employment of blue collar workers. The entrance of foreign firms to the sector is perceived as a threat. It is thought that the state should take protective measures for probable negative effects of globalization on the sector. Today share of e-commerce in Turkey is 34% in the total trade and it is low compared to developed countries. In future, online shopping is considered as a threat for physical store sales and it affects negatively employment of blue collar workers. It shows that consumers' shopping behavior is important for the creation of demand for the blue-collar workers.

In 2017, the share of the service sector in total employment is 53% while the share of the retail sector in service sector is 27% and the share of retail sector in the total employment is 11% (TAMPF, 2018.02:9). In this process the retail sector as a whole introduces a diversified labor force, going beyond its role as a mere provided of employment in the economy (PWC, 2019:8). Organized retail sector has served as an entry point into the labor market for university students and women seeking flexible hours and conditions. The retail sector has employed a large proportion of young people aged 15-24 years particularly student as common trend in global level and same trend has been observed in Turkey. Turkey had a share of 18.6 % for the 15-24 age cohorts and the share of young women in 15-24 age group employed in the retail sector was 30.6% for the period of 2009-2013 (ILO, 2015:7). These figures show that retail sector as a whole has important share in the employment of young people in Turkey. Retail sector has traditionally served as an entry point into the labor market and it has employed a large population of young people, particularly students (European Global Union, 2020:4). Although, there is no data available, it is understood from in-sector publications part- and full-time employment of

university students as a blue-collar worker have an important share in the total employment of sector in Turkey.

On the other hand, the retail sector comes after the insurance and banking sector in the world wide with the partial employment opportunities for the female labor force (ÇSGB, 2017:16). As for the rates of part time and female employees, the retail sector ranks third in the world wide in the diversity of employees, after the insurance and banking sector (PWC, 2019:29). The employment of female labor force in retail sector increased by 11% in 2017 compared to the previous year, while male labor force employment increased by 8% in Turkey (ÖZERKEN, 2018:22). It is estimated that the implied rate of informality of at least 95% for the employment of refugees in Turkey (OECD, 2018.47). Beside this, 40,000 Syrian refugees had been granted official works permits by March 2018 in Turkey (OECD, 2018:47). So, it is thought that informal employment of refugees in the organized retail sector is a realty of the sector. There have been an increasing number of Syrian workers employed in retail sector without registration (European Global Union, 2020:186)

### *Seven Characteristics of Blue-Collar Workers' Employment in the Organized Retail Sector*

White- and blue-collar workers' employment in the organized retail sector shows different characteristics. The organized retail sector is a specific labor market with the complicated problems related to the employment of blue-collar workers. Therefore, analysis of the blue collars workers' employment in the organized retail sector should be considered as a separate study. In this framework, organized retail sector can be named as a special labor market with high turnover rate, lack of qualified labor force, insufficient wage and little or no benefits. The long and dense working hours, working on public holidays, the absence of week break, transportation difficulties are also effective in this predication. With the other words, insecure and temporary jobs are main characteristics of sector. Internal and external factors affecting the development of organized retail sector are the decisive on the employment of the blue-collar workers. In this process the organized retail sector introduces a diversified labor force, going beyond its role as a mere provided of employment in the economy (PWC, 2019:8). The characteristics of employment of the blue-collar workers in the organized retail sector have been taken in the following paragraphs.

### *The High Turnover Rate of Blue Collar Workers*

The turnover rate is high for blue collar workers compared to the executive group in the sector. So, we can say that main feature of employment of blue-collar workers in the organized retail sector focuses on high turnover rate. The high turnover rate is a structural characteristic of the sector and it is accepted that as an obstacle to the development of the sector (PLAT, 2018:1). It is possible to explain current situation with an example. TEKZEN is a national store in the organized retail sector that sells building materials and furniture. As of 2019, 3000 workers are employed in this store. While the turnover rate was 8% for the white-collar workers; this rate is 35% for the blue-collar workers in 2019 (RETAIL, 2019: 23). High turnover rate related to blue collar workers in organized retail sector can be explained by the following reasons.

It shows that working in the organized retail sector has been accepted as a temporary work by blue collar workers. It is said that the retail sector is not considered as an area to make long term

career place except some firms in Turkey (European Global Union, 2020:191.) Working as sales staff is not considered as a profession. It is considered as a step-in transition to a different sector in the labor market. The high turnover rate is explained by employers with the working conditions of the retail sector (PWC, 2019:31). These conditions are also length of the daily working hours, the absence of the week holiday and low average wage (ÇSGB, 2017:37).

The weekly working times is 45 hours in Turkey. It should be reminded that the weekly working time is 50 hours and more in Turkey (T.C. Kalkınma Bakanlığı, 2018:29). The employees in the retail sector generally work for minimum wage and low wage than minimum wage. It is accepted as another reason of the high turnover rate (KPMG, 2018/01:10). Beside this, sales staffs have little freedom of choice and flexibility in working (PWC, 2019:1). All of these are considered to be causes of high turnover rate of the sales staff in the sector.

The high turnover rate of university students as the blue-collar workers has been explained with the current legal regulation by the employers. The university's students' scholarships are cut off by the state because of they have been employed in the sector. It was said that the employment of the university students in the organized retail sector has been prevented by this regulation. On the other hand, it is said that the scholarships of students are not interrupted in the İŞKUR's project (Özerken, 2018:12) and it is desired to apply the same application in the retail sector by the state. It is expected that this proposal will reduce the high turnover rate of the university's students as the sales staff in the sector (Özerken, 2018:9).

### *The Lack of Qualified Labor Force*

Due to face-to-face contact with the costumer, qualified of labor force is important in the organized retail sector. In spite of this, the lack of qualified labor force is the weakness of the sector (KPMG, 2020: 24). In the global level, the lowest skilled workforce in the retail sector is in Italy and Turkey ranks second (PWC, 2019:31). As the result lack of qualifications, it is the main problem of sector (European Global Union, 2020:191). The lowest skilled of labor force is one of the reasons for high the turnover rate of blue-collar workers in the sector.

This feature of the sector indicates the importance of the professional competence of the blue collar workers in the retail sector in Turkey. Most firms in the organized retail sector offer their employees training programs through their terms of employment (PWC, 2019:31). It is requested to expand the working initiated on the sales staff and consultancy training. The employers attach more importance to practical knowledge and work experience than diploma (Perakende, 2020:1).

The vocational training is given in Turkey since 1931 with Law Number 1867 in Turkey. Today, the sales staff and consultancy training is given in 226 vocational high schools which are marketing fields as a department in Turkey (www.mesleklisesi.net, 2020:1). It aims to offering employees the opportunity to develop their own potential and knowledge through training and developments programs (ILO, 2015:15). As a first step, vocational high school students can realize their internship in firms and they may advance in their careers in firms of organized retail sector. Labor supply and demand of graduated the sales staff and consultancy training in the organized retail sector may be determined by a research. The findings will reveal the sustainability of vocational training related to the organized retail sector.

## The High Non-Wage Cost of Labor

The high non-wage cost of blue-collar workers can be explained by the following factors. Firstly, the interruption of scholarship is accepted as a reason of high none-wage costs of students. It can be said that If the scholarships of students are not interrupted by the state because they work, it will decrease the resigns and the cost of in-service training.

Secondly, according to the Law 6111, vocational high schools and high education institutions have to pay the occupational accident and diseases premiums in compulsory internships. In spite of this, in the organized retail sector, the general health insurance premiums of the university students employed have been paid by the students. It is considered as another factor for increasing turnover rate of university students. The general health insurance's premium of the university students can be paid by the state or higher education institutions in the organized retail sector. Thirdly, the low productivity of women labor force based on low education level is also a problem for increasing in the non-wage cost of labor force. It is not expected to be solved in the short time in Turkey.

Fourthly, the employer-paid training programs have been observed in the organized retail sector and it increases the high non-wage cost of employees for the employers. There are some courses specific to the retail sector and graduate / post graduate from other streams are required. By this way, the organized retail sector contributes to increase the productivity of the blue-collar workers. Therefore, this approach raking at working place may be supported by public incentives.

## The Collective Labor Agreements

The trade union organizing movements and collective labor agreement has been seen in the organized retail sector. It is observed that a group of blue-collar workers in the sector realized to be organized in a union. The Koop-İş Union affiliated to Turk-İş Confederation is the leading in this trend. In the collective bargaining process, 45 hours of work per week and two days weekend break were demanded. As the result the demands of union were accepted and collective labor agreement was signed between Koop-İş Union and TAMPF (Federation of Shopping Centers and Retailers). It covers approximately 2800 blue collar workers and it has been signed for the period of 1 June 2019 – 31 December 2021 (PERAKENDE, 2019:1). The five firms are organized in the scope of TAMPF as the federation structure in Turkey (ÇSGB, 2017:15). It is not a sectoral collective agreement so, the worker union has not much power on changing working conditions in the organized retail sector. The effect of unions will be very limited, mostly within specific firms and the sides see each other as temporarily in the sector and this situation is an obstacle for the unionisation in Turkey (European Global Union, 2020:191).

## Failure to Comply With the Labor Legislation

The employment of blue-collar workers in the organized retail sector must comply with the labor legislation. In the application, it fails to comply with the legislation and some problems have been observed in the employment of blue-collar workers in the national chain markets.

One of these problems is related to the payment of the wage. It is understood that actual wage and registration wage are applied in the firms. It can be said that full and partial informality is

observed in paying wage and social security premiums in national and local chain market establishments in Turkey (ÇSGB, 2017:46). It is seen that young people generally are employed informally and in irregular jobs in Turkey (T.C. Kalkınma Bakanlığı, 2018:24) and the share of university students is important in the total employment in this sub sector. On the other hand, full and partial informal employment can be observed related to the employment of sales staff. It can be interpreted a reason for high turnover rate related to the blue-collar workers in the sector. It is observed as a negative trend in the proportion of insured employees in terms of wages was 9.3% in 2011, this rate is 9.1% in 2015 in the organized retail sector (PERAKENDE, 2019:30). On the other hand, it is said that the organized retail sector is struggling with the informality in Turkey (PWC, 2020:24). In the certain legal framework, some problems are observed. It shows that there are violations and deficiencies in the application of legal regulations in the employment in national and chain markets as the sub sector of organized retail sector (ÇSGB, 2017:44). It is possible to say that the results of research reflect the realities in the organized retail sector in Turkey.

### *Different Wage Systems and Working Times*

It is observed that different wage systems have been applied in national and local chain markets as the sub sector of organized retail sector in Turkey. According results of research has realized by the ÇSGB gives the idea related to wage system in national and local chain market of organized retail sector in Turkey (ÇSGB,2017:36). While 37.1% of workers receive minimum wage; 46.4% of workers receive wages over the minimum wage. It is seen that 8.2% of the workers work with hourly wages and 8% of them work with daily wage. It is observed that share of workers with hourly wages is small in total. We can say that workers' wages must be paid, at least minimum wage and 0.3 % of workers' wages model are unknown in this sub sector. As a working times and their organization has been accepted as a key element of the changes in the retail sector (ILO,2015:10). The organization of working time is much more important in retail sector in comparison to the other sectors. It is said that an hourly working model is needed in the organized retail sector (PLAT, 2018:3). It is considered that working conditions and quality of the labor force in the retail sector are considered suitable for working at an hourly rate (PWC, 2019:31).

**Table 2.** Distribution of Workers by Wage in the National and Local Chain Markets in Turkey

| Wage Type | Workers % |
|---|---|
| Minimum wage (monthly) | 37.1% |
| More than minimum wage (monthly) | 46.4% |
| Hourly wage | 8.2% |
| Daily wage | 8.0% |
| Unknown | 0.3% |

*Source. Ç.S.G.B.,(2017)*

**Figure 2.** Distribution of Workers by Wage in the National and Local Chain Markets
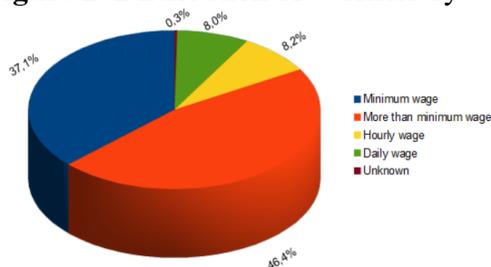
*Need of Temporary Labor Force*

The need of temporary labor force in the organized retail sector increases from time to time such as in the seasonal transition periods and holidays. Organized retail sector has difficulty in finding temporary and part time labor force in these periods. Temporary work has been accepted as a major impact on employment trends in the retail sector (ILO, 2015:12). It can be said that the firms aim to win the financial flexibility by the temporary employment. The temporary work has been interpreted as a measure of competition policy in order to decrease cost of labor force in the organized retail sector. This demand enables the firms to control the labor cost. Temporary workers' employment is accepted as a costly strategy by the firms (EYCK, 2003:33)

Positive effects of this employment type is limited with the vocational qualified of the external labor force. The lack of work experience of the additional labor force may mean high non-wage cost. In this situation, employment of temporary labor force has low productivity causes additional financial loads to the firms. It is said that the current legislation doesn't meet the sector's demand for temporary worker by the private temporary employment agencies (TAMPF, 2018, 2:16). It aims to reduce restrictions on hiring workers on a non-permanent basis by the legal regulations.

## Conclusion

This study is aimed to introduce the features of blue collar workers' employment in the organized retail sector in Turkey. It is limited by the end of the year 2020. The findings of this paper may provide meaningful policy suggestion for the firms in the organized retail sector. The findings and recommendations are provided in below.

*Discussion*

The limited data related to the employment of blue collar workers is the major limitation of this study. This study based on two basic resources. Firstly, the public research carried out by the relevant ministry is the main research on this subject. The findings of research related to national and local chain markets will clarify the main characteristics of blue collar's employment determination of wages in the whole organized retail sector in Turkey. Secondly it is based on data obtained from the sector's publications.

The scope of the study concentrates on the following chapters. The first chapter begins by providing a macro view of retail sector's segmented structure in Turkey. The firms of organized and unorganized retail sector as commercial firms are subject to the Trade Law. Tradesmen firms have taken place in the traditional retail sector. This sub sector has a dual structure as registered and unregistered. The registered part of traditional retail sector has been organized in the scope of TESK (Confederation of Turkish Tradesmen and Craftsmen) by the Law No. 5362 in 2005. Unregistered traditional retail sector is still predominating over the registered trade sector. The number of unregistered traditional firms and the rate of unregistered employment are unknown. Each of them differs in terms of firm sized, rate of informality and working conditions.

Second chapter shows analysis of the blue collar employees' employment in the organized retail sector. The female workers, university students and refugees with especially Syrian national workers have attracted attention among the blue collar workers. The university students are the

most strategic labor group in the sector. Organized retail sector can be accepted as the secondary labor market with high turnover, low pay and usually part-time or hourly or temporary work for blue collar workers. As the result of high turnover rate, working in the organized retail sector as being sales staff is not considered as a profession by the blue collar workers.

The lack of qualified labor force is a problem in the sector. It is aimed to increase the productivity and employability of the workers with the employer-paid training programs. This method increases the high non-wage cost of employees for the employers.It is observed that different wage systems have been applied such as minimum wage, wage over the minimum wage, daily and hourly wage for the blue collar workers in national and local chain markets as the sub sector of organized retail sector in Turkey.

Public research shows that there are violations and deficiencies in the paying of the wage. It is observed that partial informality in the paying of wage. Beside this, it is seen full and partial informality for the social security premium.Future of the organized retail sector will be determined by two factors. Market type retailing based on the net work of gas station is spreading. Beside this, it is commented that the number of shopping centers is sufficient and opening of new one can not be planned. It can be interpreted as an indicator that weight in the organized retail sector will shift from big cities to small cities and small residential areas in Turkey. It is estimated that this shifting has the positive effect on the local labor market.

The temporary work is a measure of competition policy in order to decrease cost of labor force in the organized retail sector. Realizing of temporary work must be accompanied by the efforts to ensure worker's rights and protection. Under the labor market conditions in Turkey, temporary work is an insecure form of the work. As the result, we can say that it is not possible to meet the demand of firms in organized retail sector by the private temporary employment agency in the short period.The group collective agreement has been realized in the organized retail sector and it is important step for the trade unionism. It is thought that it will contribute positively to the regulation of working conditions in the sector in the long period.

### *Recommendations*

The specific training programs to enable the unskilled workers to get employment in the organized retail sector should be promoted by the state. It should be carried out in collaboration with organized retailers as a public private partnership model.

In vocational high schools, the training given about sales and retail sector should match the demands of the organized retail sector. It may be demonstrated with a research at firm level. It will also reveal that vocational training on this subject is a sustainable employment project in Turkey. The vocational high school students can do internships in the sector. A joint study can be conducted within the scope of state and private sector cooperation between vocational high schools and firm in the organized retail sector. It is thought that this cooperation will support to the matching demand and supply of vocational high schools' students in the organized retail sector. It is suggested that the sector has a duty in this regard.

It is understood from sector's publication that employment of university students has a strategic importance for the sector. It is said that providing scholarships to the university students

increases the turnover rate and non–wage cost of university students for the employers. Legal regulations should be made to support employment of university students in the sector by the state. Making necessary arrangements will increase the labor supply of this group towards to the sector. Beside this it will decrease the non-wage cost of labor force for the sector.

It is seen that the general health insurance premiums of the university students employed as the blue collar labor force have been paid by the students. This regulation limits supply of the university students as the labor force to the sector. The offering of the employers must be accepted. So, the scholarships of university students employed in the sector must be continued and general health insurance premium of students must be paid by the university or state as in İŞKUR's projects. Fluctuation in the level of blue collar workforce employment in the sector makes it difficult to collect data and analyzing sectoral employment. Education level, gender distribution, seniority and satisfaction of the blue collar workers can be investigated. It is recommended to conduct a field study involving 2800 workers covered by group collective bargaining agreement in the organized sector. It is thought that Federation of Shopping Centers and Retailers (TAMPF) can lead in this matter. Findings on workforce satisfaction will be a guide for the employers and employees. The field studies will eliminate uncertainties in blue collar employment and will determine the employment policy to be followed in the organized retail sector.

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