WFP
World Food Programme
SAVING LIVES
CHANGING LIVES

In-Camp Electronic Voucher Programme in Türkiye

Market Price Monitoring (PMM),
On-Site Monitoring (OSM), and Protection Report

Quarter 3
(July — September)
2022

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HIGHLIGHTS

- The food basket cost has increased by **127 percent** from TRY 213 to TRY 484 between September 2021 and 2022.
- The **inflation rates are at the highest level since 1998**; the annual inflation rate in September 2022 is 84 percent and the food inflation is even higher at 93 percent.
- As the prices go up, the gap between the camps with the most and least affordable food basket costs reached TRY 47.
- The purchasing power of beneficiaries deteriorated, despite the contracted markets offering the cheapest prices and the cheaper prices in the summer season. The sales of vegetables and fruits decreased in this period.
- The camp beneficiaries have had fewer employment opportunities in this summer than they usually had in previous years.
- The increase in the cost of agricultural inputs compel farmers to produce less and limit the number of daily workers.
- WFP-TK e-voucher programme included Ukrainian refugees that recently arrived and located in the Elazig camp.
- The call centre received 173 calls majority of which were about household information updates (91 calls).
- Outreach activities mainly included 94,780 SMSs, 3000 BIM card brochures distributed in six camps, and 2000 brochures distributed in the Elazığ camp.

Q3 2022 CONTEXT

- In Q3 2022, Syrian refugees were located in camps and the Presidency of Migration Management continue their registration. WFP and TK delivered market vouchers (BIM Cards) to 1,453 unregistered refugees upon their arrival to the camps and quickly included them in the next payment cycle of Kizilaykart programme. WFP and Türk Kızılay continue to assist the newcomers by providing them with BIM cards until they become eligible for the e-card assistance (Kizilaykart).
- As of 19 September 2022, WFP has extended the in-camp e-card programme to 2397 Ukrainian refugees by supporting the Elazığ Aşağıdemirtaş camp, which hosts around 2,500 Ukrainians under GoT protection.

	JULY	AUGUST	SEPTEMBER
BENEFICIARIES	43,084	42,499	45,709
TOTAL VALUE OF ASSISTANCE (TRY)	6,462,600.00	6,374,850.00	7,222,350.00

MONITORING ACTIVITIES

The monitoring activities have been successfully implemented throughout the third quarter of 2022, thanks to the close collaboration between WFP and Turkish Red Crescent (TK) as well as the cooperation of the camp management and contracted market managers. Through the on-site monitoring visits, the field teams gather information about recent developments in the camps and visit contracted markets to assess market conditions and food availability. In addition, WFP field teams conducted 378 post-distribution monitoring surveys in the reporting period

MONITORING ACTIVITIES—Q3 2022

Month	JULY	AUGUST	SEPTEMBER
Price-Market Monitoring (PMM)	20	20	21
Camp On-Site Monitoring Visits	10	10	10
Post Distribution Monitoring	136	124	118
TOTAL	**166**	**154**	**149**

OBJECTIVES

Objective: This report presents the main findings of in-camp monitoring activities from April to June 2022. The market monitoring aims to:

1) Evaluate the partially* restricted e-voucher program's performance;

2) Provide information on important issues that were reported and addressed in stores throughout the reporting period;

3) Compare price changes in WFP-TK contracted and non-contracted shops over time.

The report also includes data on protection referrals, complaint and feedback channels, and outreach activities that took place during the reporting period.

Market Price Monitoring: WFP and TK (Türk Kızılay–Turkish Red Crescent) jointly collect item prices from the contracted shops once a month as well as from non-contracted shops located nearby the camps for comparison purposes. This enables WFP and TK to monitor the programme closely, ensuring that shops follow their contractual obligations and that product pricing in camps is in line with local market trends.

On-Site Monitoring: On-site monitoring activities are conducted every month during camp visits to keep the programme informed about issues of importance relevant to refugees and could have an influence on the programme.

Protection referrals: Since 2017, a protection referrals system has been in place to help refugees with their protection needs. WFP field teams identify cases that require particular attention during camp visits, as well as TK staff based in the camps and/or Camp Managements. WFP refers identified cases to relevant agencies or persons for resolution.

Complaint and feedback mechanism: Three Arabic speaking operators of Türk Kızılay's 168 Call Centre are dedicated to the in-camp programme. The Call Centre has been receiving complaints and feedback from the in-camp residents since August 2019 and has been addressing them to ensure smooth and effective implementation.

* Since December 2019, 80 percent of the assistance provided is restricted for food and 20 % is non-restricted .

METHODOLOGY

WFP field teams visit the camps every month without prior notice. Visits are usually scheduled during the week in which payments are made. WFP staff consider the following factors during the shop visits:

- overall shop condition;
- availability of food items;
- quality of food items;
- prices of food items;
- issuance of itemized receipts to beneficiaries;
- shop staff practices/behaviour towards beneficiaries;
- visibility of programme information material/ posters;
- compliance with programme rules;
- programme awareness of shop employees;
- beneficiary feedback.

In Q3 2022, 61 market monitoring activities have been conducted. WFP and Türk Kızılay (TK) continued to collect market prices at different times from the contracted markets while WFP staff also reached out to the non-contracted markets to compare the food basket costs.

The table below shows the number of contracted and non-contracted shops monitored during the reporting period.*

NUMBER OF SHOPS MONITORED—Q3 2022

Month	CONTRACTED SHOP	NON-CONTRACTED MARKET	TOTAL
July 2022	10	10	20
August 2022	10	10	20
September 2022	10	11	21
TOTAL	**30**	**31**	**61**

1. Market Price Monitoring

Price monitoring exercises contribute to the calculation of the average food basket cost. The food basket delivers 2,100 kcal per person/day aligned with Sphere requirements and is composed of certain commodities selected based on the refugees' food consumption preferences (for more information on the methodology, please see 'In-Camp PMM and OSM Report Q1 2018').

WFP monitors the food baskets cost every month at four levels: The WFP and TK field staff collect the data from (1) the contracted shops (blue line in Figure 1) where refugees redeem their e-vouchers; (2) the non-contracted shops (orange line) near the camps, which serves as a reference point for comparison with the contracted shops in the camps. This report traditionally includes (3) the Turkish national level (grey line) and (4) the Southeast regional level food basket (yellow line) data that are retrieved from the Turkish Statistical Institute (TurkStat)** However, the latest available data is from April 2022 since TurkStat is updating its methodology.

MONTHLY FOOD BASKET

Items	Quantity	Unit
Bread	7.5	Kg
Rice	3	Kg
Bulgur	1.5	Kg
Beans	1.5	Kg
Eggs	30	Pieces
Yoghurt	1.5	Kg
White Cheese	1.5	Kg
Tomatoes	0.9	Kg
Cucumber	0.9	Kg
Sunflower Oil	0.75	Lt
Sugar	1.5	Kg
Salt	0.15	Kg
Tea	0.15	Kg

* The Elazig camp is excluded from the market analysis in this report and monitored separately as it hosts Ukrainian refugees with different migration status, whereas the current camps host Syrian and Iraqi refugees who have Temporary or International Protection status.
** WFP price data is collected for the commodities selected by refugees - usually the cheapest brands available, whereas in its methodology, Turktat collects data from better quality products that reflect Turkish preferences.

Food prices and the food inflation continue to increase, resulting in high food basket costs. The inflation rate hit a record of 24 years at 84 percent in September 2022. After reaching 95 percent in August 2022, the food inflation actualized at 93 percent in September, severely affecting the prices in the markets. Even though the contracted shops offer a lower food basket cost than the noncontracted shops (TRY 543), the food basket cost in contracted shops increased by 127 percent from TRY 213 in September 2021 to TRY 484 in September 2022. The purchasing power of camp beneficiaries continues to deteriorate; the adequacy of the assistance decreased from 58 percent in September 2021 to 31 percent in September 2022, which has been the lowest rate since the beginning of the e-card programme. When the portion that is allocated for the non-food items (20%) is removed, the assistance covers only one-fourth (25%) of the food basket cost.

FIGURE 1: FOOD BASKET PRICE (TRY) TRENDS BETWEEN SEPTEMBER 2021 – SEPTEMBER 2022

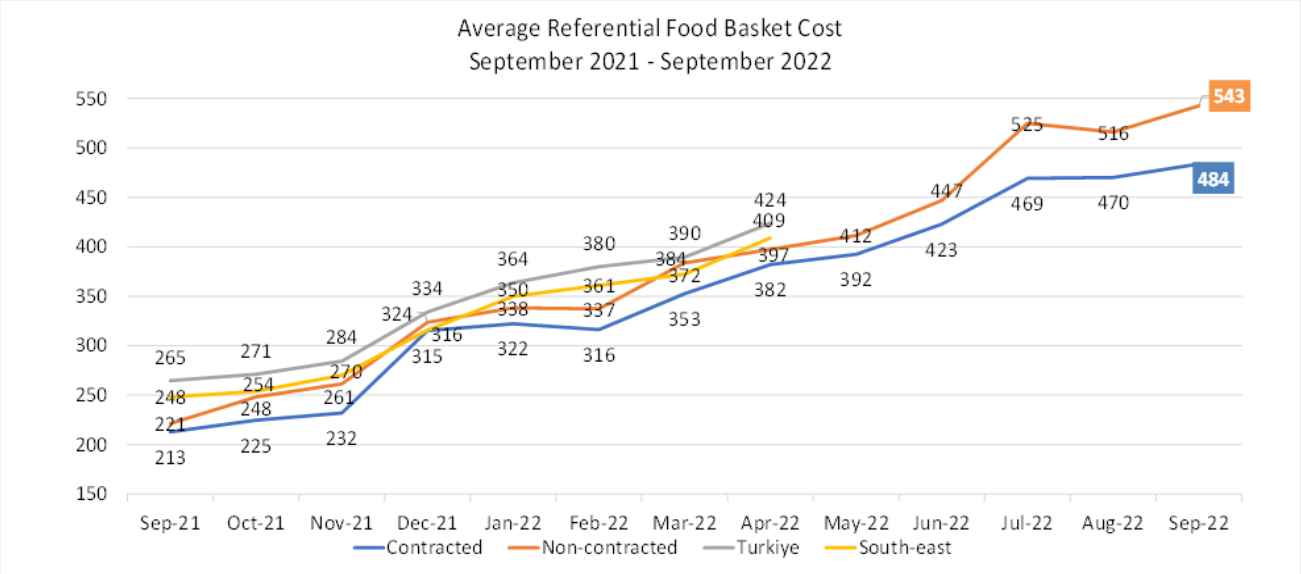
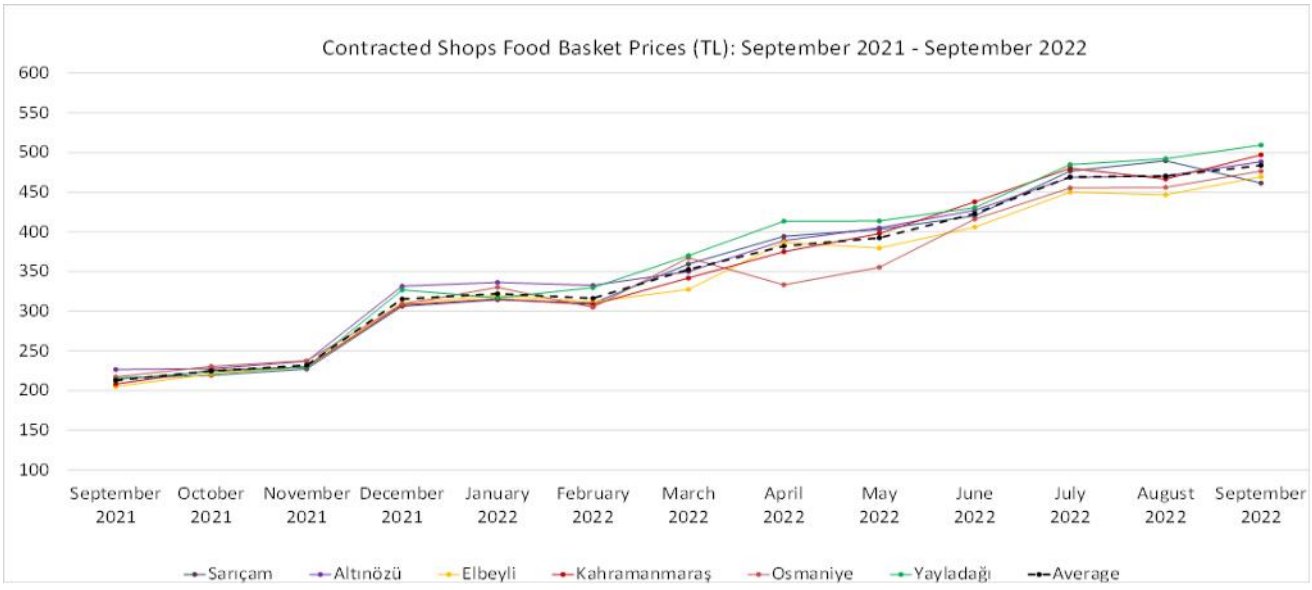


Figure 2 indicates the food basket cost trends in the contracted markets by camp location. While all six camps indicate similar trends of price increase, the gap between the camps is expanding. The food basket cost in the Yayladagi camp is the highest at TRY 509, TRY 47 higher than the food basket cost in the Adana Sarıçam camp (TRY 462). This gap represents almost one-third of the current assistance amount (TRY 150) and raises equality concerns among the e-card beneficiaries. On the positive side, 40 percent of the beneficiaries live in the Adana Sarıçam camp, whereas the Yayladagi camp hosts the lowest number of beneficiaries across all camps

FIGURE 2: FOOD BASKET PRICE (TRY) TRENDS IN CONTRACTED SHOPS IN ALL CAMPS, SEPTEMBER 2021– SEPTEMBER 2022



2. On-Site Monitoring

A. Administrative/ management issues

CAMP OVERVIEW

In July, the PMM initiated an exercise to relocate irregular migrants, living across Türkiye, in Temporary Accommodation Centers (TACS/ camps). These individuals, of which an overwhelming majority are single males, are located in the designated neighbourhoods. The camp managements temporarily provided three hot meals to the newcomers.

Moreover, they are provided with BIM cards (TRY 150 per person) to ensure their immediate needs are met. In August and September, those who received their temporary IDs became e-card beneficiaries while others continued to receive BIM cards. The security staff accompany the BIM cardholders to the camp markets for shopping. The camp managements designed safe areas where irregular migrants meet with their friends and relatives from outside of the camp. From September on, irregular migrants are allowed to leave the camps to join their families upon submitting an official marriage certificate.

For the upcoming months, the Apaydin camp is prepared to host irregular migrants if needed. Meanwhile, the Elazığ camp started to receive Ukrainian refugees. As of the reporting period, the assistance provided in the Elazığ camp for the Ukrainian refugees include hot meal distribution by the Camp management and the WFP-TK e-voucher.

WFP field staff occasionally observe or being reported about misinformation spread regarding camp closures, deportation of camp residents, and transfer value amount. Camp managements, TK, and WFP personnel put efforts to refute such fabricated information.

In July, some Turkmen-origin Syrian families (around 100 people total) in Osmaniye camp moved out of the camp to seek better employment opportunities in the city centre. They stated that moving in summertime is relatively easier and affordable and allows children to settle in their new environment before school starts.

WFP teams continue to visit relevant authorities including PDMM, camp managers, TK offices to exchange information and update each other on recent developments regarding their interventions.

ISSUES WITH ACCOMMODATION

In Kilis camp, beneficiaries complained about decays in their containers and ineffective insecticides. It is reported that water runs weakly that beneficiaries have difficulty in handling their daily needs including washing dishes, bathing, and cleaning.

In Adana camp, the problem with the water wells became more distinct in summer times. To provide water supply to all, the management allowed water flow 3 times a day. Beneficiaries have to fill buckets to use during the water cut.

SCHOOLING AND EDUCATION

Since school opening, school-aged children are not allowed to leave the camps until around 2.00 pm. However, in Kilis Elbeyli camp, with the decision of the Ministry of Education and permits of the families, students are allowed to go to high schools in the city centre. They leave the camp with a permit and use the school shuttle for transportation.

E-CARD RELATED ISSUES

There is no e-card-related issue detected during the reporting period.

B. Shop regulations, conditions, and maintenance

The contracted markets were clean, and tidy, and had adequate services during the reporting period. The markets are somewhat busier in the first few days after the upload and they are almost empty for the rest of the month as beneficiaries use up the assistance in one week after the upload which used to last for the entire month previously.

In August, an incident of a child shopping with an e-card occurred in the Kahramanmaraş market. The market management was informed and requested to be vigilant for such incidences.

C. Food Availability

Overall, the markets have a variety of products available in the reporting period. However, it was detected in the Adana camp that the green products were not looking fresh. The market staff stated that the items go bad faster these days because of the hot weather (above 40 °C) and there is less circulation of vegetables and fruits because of the decreased demand and therefore sales. Markets do not have cooling systems for the vegetable and fruit stands due to distribution from central storages.

In Kahramanmaraş camp, a WFP field staff detected stale bread sold in the market. The issue was solved by the market management immediately.

D. Purchasing Power

AFFORDABILITY AND CONSUMPTION OF FOOD ITEMS

The beneficiaries reported a change in their consumption behaviours due to lack of economic capacity. They state that they are not able to purchase meat and chicken for a long

time and used to eat eggs to compensate for meat. However, they have recently started to reduce their egg consumption as well. According to the camp market staff, the sales of milk and legumes in Altınözü and sunflower oil in Adana decreased significantly along with meat, chicken, and eggs. In Osmaniye, the market staff stated that vegetables are homegrown thus relatively more affordable compared to fruits provided by retailers.

In the Adana camp, beneficiaries particularly mentioned high bread costs. While 600 grams of Arabic bread was TRY 4.30 a few months ago, currently a 300 grams Arabic bread is sold for TRY 5.00. Many women in Adana camp also reported that they used to buy vegetables in bulk to prepare some food items such as tomato paste to consume in winter, but due to the high price increases, they are not able to do such winter preparation this summer.

FEWER EMPLOYMENT OPPORTUNITIES

The camp beneficiaries rely on daily work during the summer in agricultural fields to save money to be spent during the winter season to cover their expenses. However, due to the slowdown in agricultural production activities, the labour demand decreased significantly compared to the previous years, leading to limited opportunities for camp residents. The families, including children who are on summer break, are involved in daily agricultural work whenever they can. The opportunities in the agricultural fields were higher in Kilis and Kahramanmaraş, where the camp residents were paid around TRY 100-150 daily yet they reported **not** being able to save enough for the upcoming months.

Beneficiaries expect an increase in the e-card assistance, saying that the assistance is hardly enough to cover the bread cost of their households. The e-card is no longer considered to be a source of income for many beneficiary households.

EDUCATIONAL COSTS

In September, many beneficiaries with school-aged children expressed their concerns over the high costs of school uniforms and stationery items. This was more challenging for those who have multiple children going to school. In the Osmaniye camp, one female-headed household said that she exchanged sunflower oil and sugar that she bought with the e-card to buy notebooks for her children.

Another complaint is about the exclusion of the household members from the e-card programme when they leave for college. Families stated that these children still depend on their families for living and they requested that the assistance should continue for these children who moved out of the camp for university education. To support these children, families purchase durable food items with the e-cards and send them along with their children and reduce their household consumption to cover their education expenses.

3. Protection and Referrals

As of Q3 2022, in total 197 cases with protection requirements have been identified in the camps and referred to the relevant protection actors.* The cases are identified either by WFP monitoring teams during camp visits or are referred by TK staff based in the camp and/or Camp Managements. Among all, 52 percent of the protection cases were raised by men and 48 percent of them were raised by women. Being the most populated camp, the Sarıçam camp has the highest number of protection referrals (81%), followed by the Kahramanmaraş camp (17%). Except for the two cases in Kahramanmaraş that have Iraqi nationalities and 1 Ukrainian in Elazığ, all the protection cases were uttered by Syrians.

Medical equipment requests (143), and access to medicine and health services (25) are the most common referral reasons. Camp residents have difficulty in accessing high-cost medical equipment which are not covered by governmental health care. PDMM related referral reasons include registration and obtaining Temporary Protection IDs (Figure 4).

During this reporting period, one protection case regarding document accreditation was identified and referred by WFP.

FIGURE 3: REFERRALS BY CAMPS AS OF Q2 2022

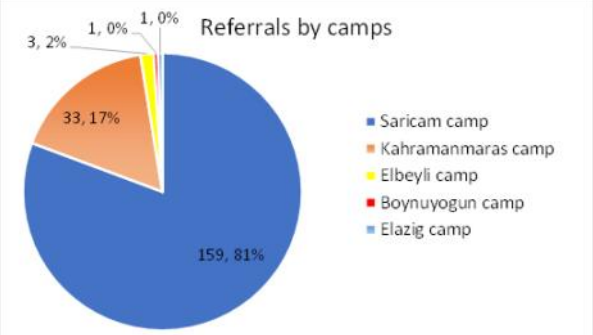
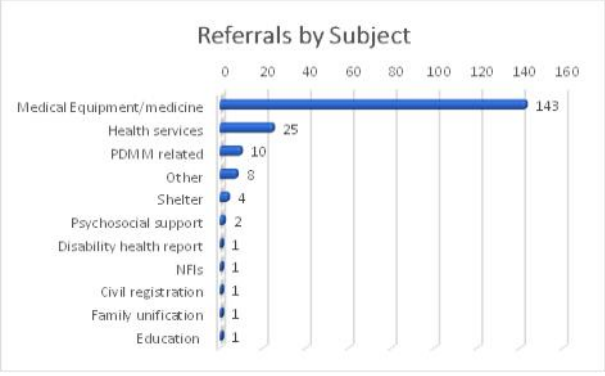


FIGURE 4: REFERRALS BY SUBJECTS AS OF Q2 2022



* Ukrainian refugees in the Elazig camp are included in the protection and AAP section as the referral mechanism works the same for all refugees.

4. Accountability to the Affected Population

In Q3 2022, along with the regular AAP and outreach activities, TK and WFP prepared posters, brochures, SMSs, and announcement texts providing information regarding transfer value, 168 call centre, how to use e-cards, how to update beneficiary information, how to make complaints and provide feedback etc. to sensitize the newly included Ukrainian beneficiaries.

A. Received calls by the 168 Call Centre

During the reporting period, the 168 Call Center received and responded to 173 calls. Despite the inclusion of Ukrainian refugees in the programme, the number of calls received decreased by 46 percent compared to Q2 2022. Ukrainians made 26 calls to the call centre during the reporting period.

The highest decrease (from 219 in Q2 2022 to 91 in Q3 2022) was observed in the category of household information updates. Among these, 19 calls were received from Ukrainian refugees in the Elazığ camp.

The majority of the calls were received from the Sarıçam camp (46%), followed by Elazığ (16 %) and Elbeyli camps (13%) respectively. Household information updates remains the main reason for calls (62%), followed by card issues (30%), information requests (6%) and complaints (2%).

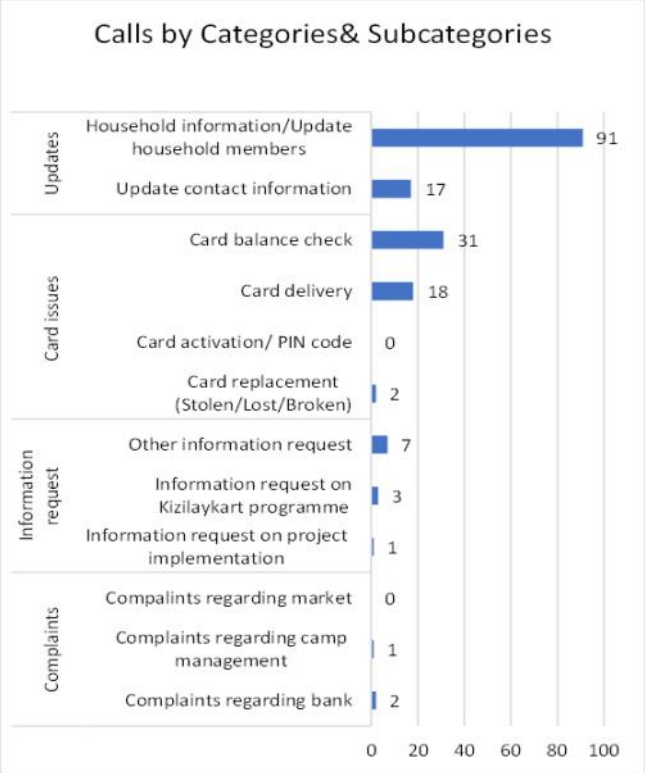
More than half (64%) of the calls were made by men. The percentage of calls made by women has slightly increased compared to the previous reporting period (from 33% to 36%) due to Ukrainians living in the Elazığ camp, majority of whom are women.*

Information requested in this reporting period included application process and eligibility criteria, additional assistance for disabled people holding health reports, and card distribution.

Only 3 complaint calls were received regarding card delivery and household information updates in the camp residency system.

No fraudulent cases have been observed.

FIGURE 5: CALLS BY CATEGORIES Q3 2022



B. Outreach Activities

During the reporting period, 94,780 SMSs have been sent to the camp residents.

WFP and TK provided BIM cards to the newly arrived refugees who go through the registration process until they become eligible for the e-card programme with their official temporary protection statuses. BIM Card brochures were designed, and 3000 copies were distributed to the newcomers to sensitize them on how to use their cards and who to contact if they have any issues.

Moreover, in this reporting period, 2000 brochures and 40 posters in Turkish and Ukrainian languages were designed to inform Ukrainians living in the Elazığ camp. During the card distribution period, the posters were put up at various locations in the camps that are visible to the camp residents. Brochures were distributed to all families when they received their cards. WFP field teams together with TK field staff sensitized all beneficiaries (around 750 HH) in groups (6 to 10 people), explaining how to use their cards, their entitlements, and how to use the complaint and feedback mechanisms in place, including the Call Centre (168). In addition to the visibility materials, SMSs have been translated into Ukrainian. SMSs will be shared with Ukrainian beneficiaries once the camp management updates the residents' contact information.

FIGURE 6: SMS SENT BY CATEGORY IN Q3 2022

SMS Sent by Category – Q3 2022	
Category	Number of
Dormant account - swept	20,436
Dormant account - warning	20,520
Upload	22,835
Coronavirus sensitization	22,835
Eligibility - bank branch information	481
Discrepancy related	51
Complaint related	4
ATM-Balance Check	7,618
Total	**94,780**

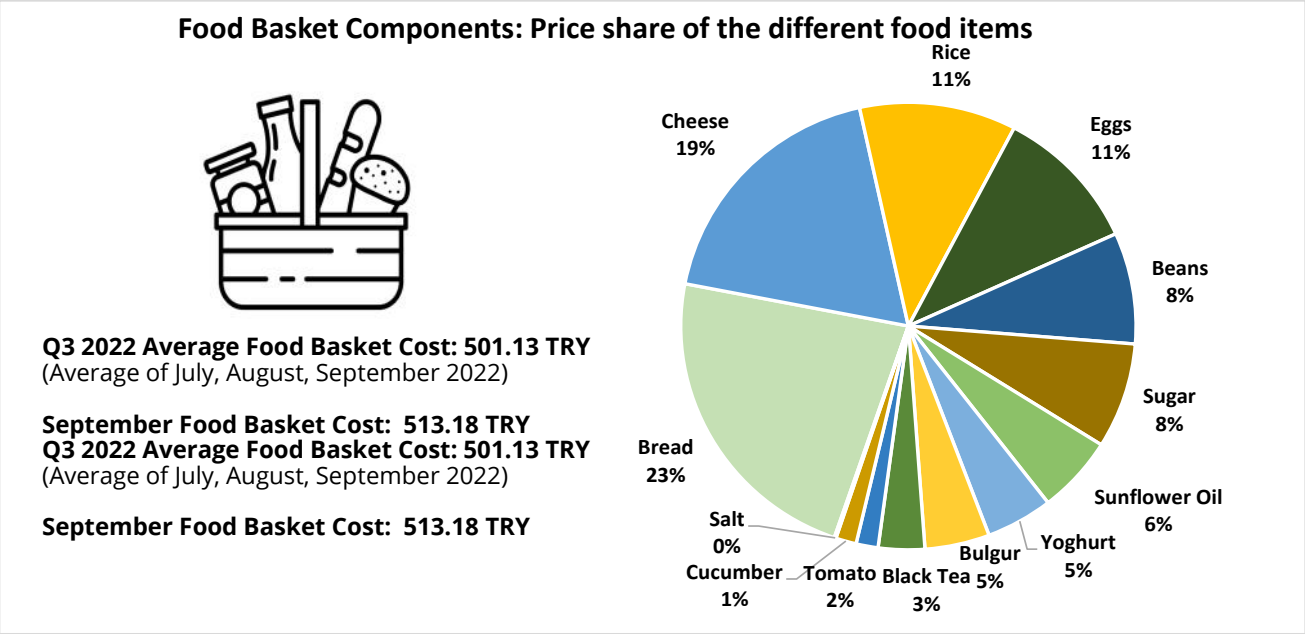
* 65% of the calls received in the Elazig camp were made by women beneficiaries.

OUTREACH SNAPSHOT

ANNEX 1

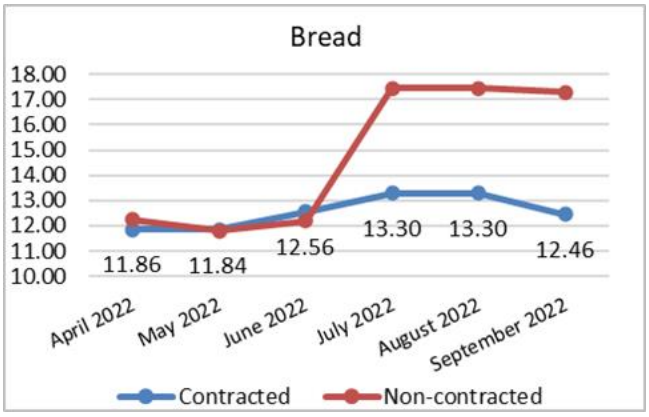
The food basket is designed to be nutritionally balanced, in line with the food consumption habits of the refugees in Türkiye, and at the lowest feasible cost. The food basket components are shown in Figure 7. Bread has the highest share in the food basket, reaching 23 percent for the first time due to high quarterly increases in prices and having the highest weight (7.5 kg/per person) in the monthly food basket. Cheese remained the second most expensive item followed by rice and eggs, and beans. Due to the sharper increase in egg prices, the share of eggs increased from 9 percent to 11 percent between Q2 2022 and Q3 2022.

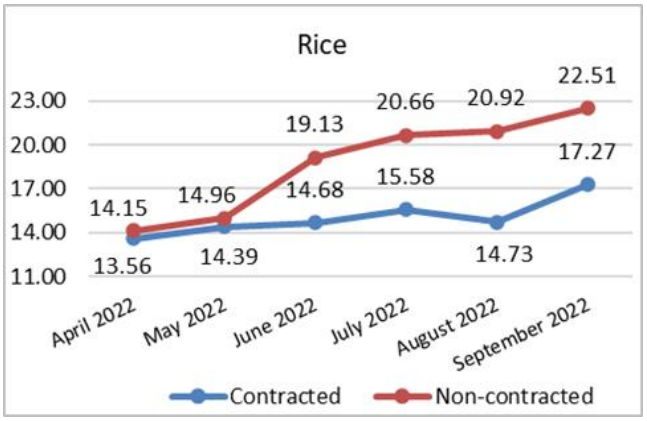
FIGURE 7: PERCENTAGE OF FOOD BASKET COMPONENTS AND TOTAL FOOD BASKET COST

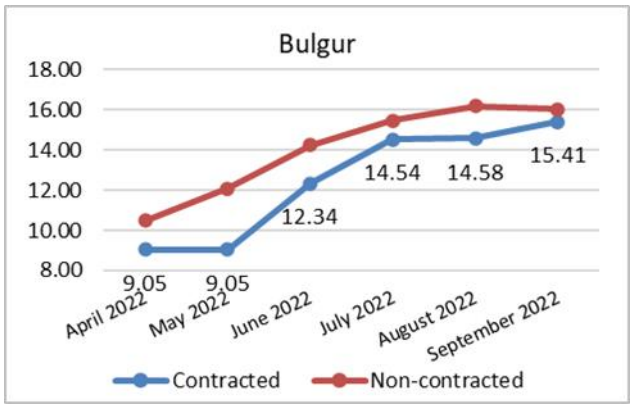


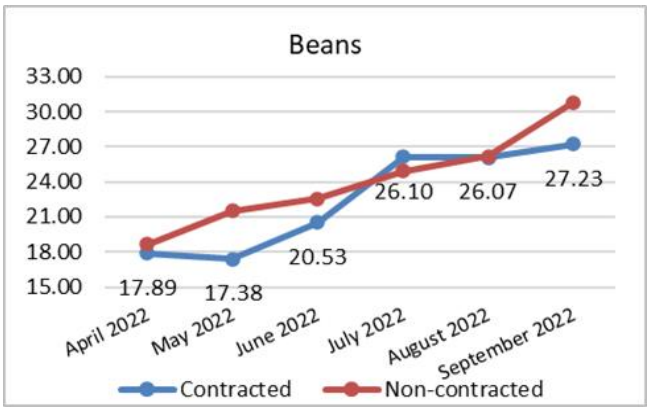
The price trends for each food basket item in Q3 2022 are depicted in Figure 8. All items have significant price increases, except for green vegetables due to seasonality. The price increases are particularly high for eggs, beans, sugar and bulgur. In the contracted markets, the 30-piece egg container prices doubled from TRY 31 in Q2 2022 to TRY 60 in Q3 2022. The kilogram price of beans increased from TRY 21 to TRY 27 in the same period. The cost of sugar increased from TRY 22/ kg to TRY 25/kg after a sharp increase in Q2 2022 from TRY 16/kg. Bulgur prices increased by 30 percent from TRY 12 to TRY 15.

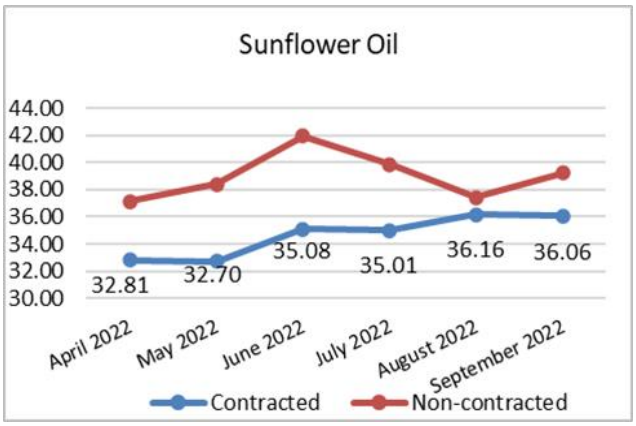
FIGURE 8: DIVERGENT PRICE TRENDS (TRY/KG) FOR WFP REFERENTIAL FOOD BASKET ITEMS IN CONTRACTED AND NON-CONTRACTED SHOPS






Bulgur
18.00
16.00
14.00
12.00
10.00
8.00
9.05
9.05
12.34
14.54
14.58
15.41
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted


Beans
33.00
30.00
27.00
24.00
21.00
18.00
15.00
17.89
17.38
20.53
26.10
26.07
27.23
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted


Sunflower Oil
44.00
42.00
40.00
38.00
36.00
34.00
32.00
30.00
32.81
32.70
35.08
35.01
36.16
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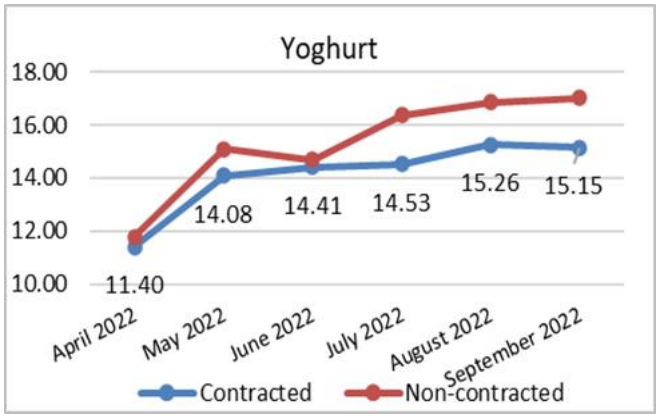
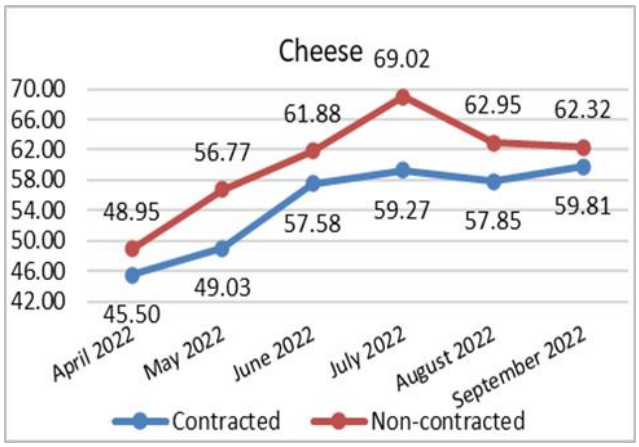
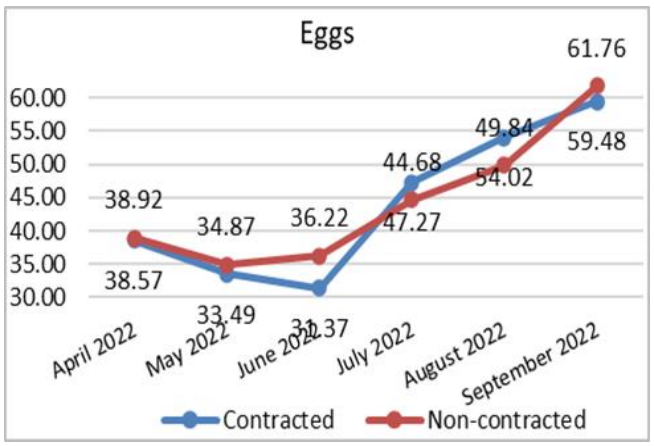
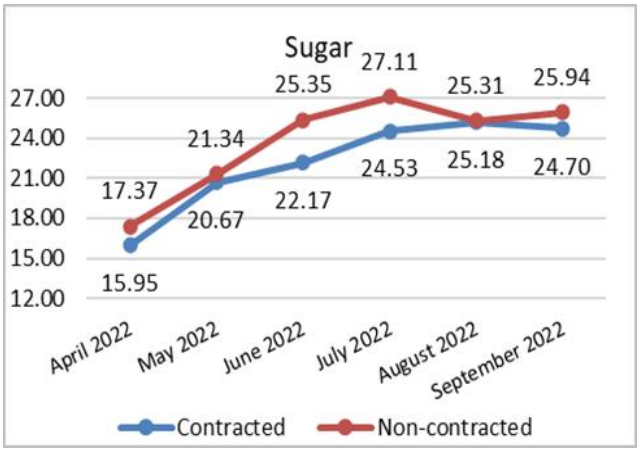
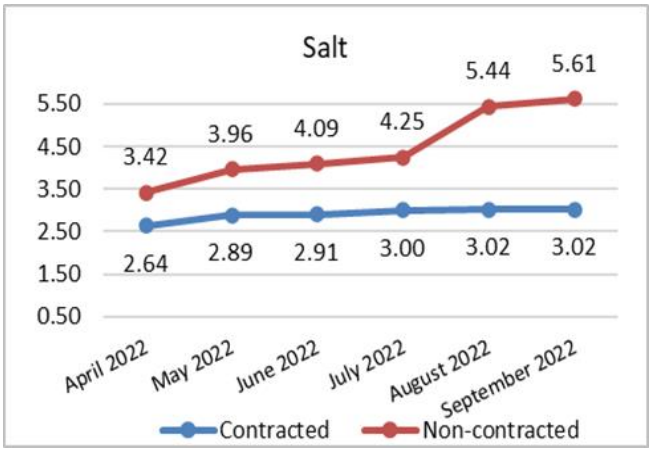
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted

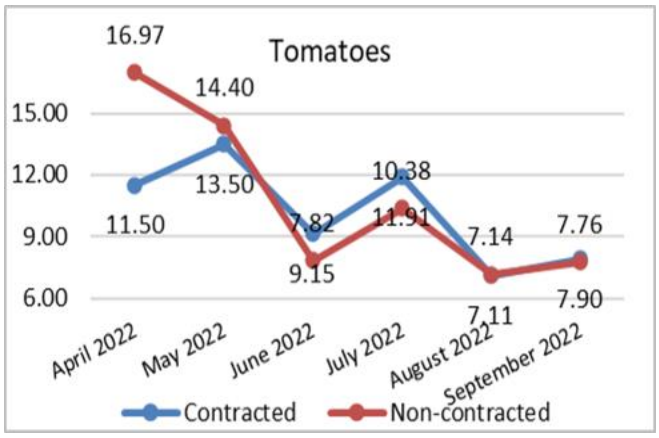

Yoghurt
18.00
16.00
14.00
12.00
10.00
11.40
14.08
14.41
14.53
15.26
15.15
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted

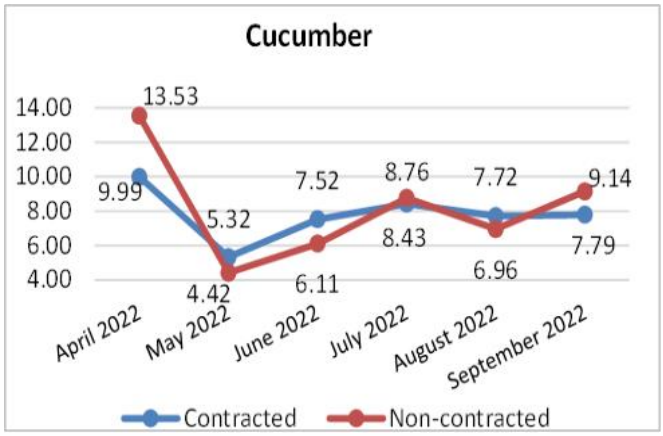

Cheese
70.00
66.00
62.00
58.00
54.00
50.00
46.00
42.00
48.95
56.77
61.88
69.02
62.95
62.32
45.50
49.03
57.58
59.27
57.85
59.81
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted

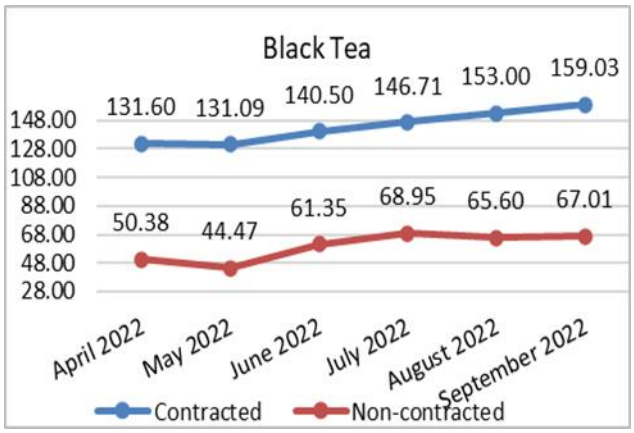

Eggs
60.00
55.00
50.00
45.00
40.00
35.00
30.00
38.92
34.87
36.22
44.68
49.84
61.76
38.57
33.49
31.37
47.27
54.02
59.48
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted


Sugar
27.00
24.00
21.00
18.00
15.00
12.00
17.37
21.34
25.35
27.11
25.31
25.94
15.95
20.67
22.17
24.53
25.18
24.70
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted


Salt
5.50
4.50
3.50
2.50
1.50
0.50
3.42
3.96
4.09
4.25
5.44
5.61
2.64
2.89
2.91
3.00
3.02
3.02
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
Contracted
Non-contracted

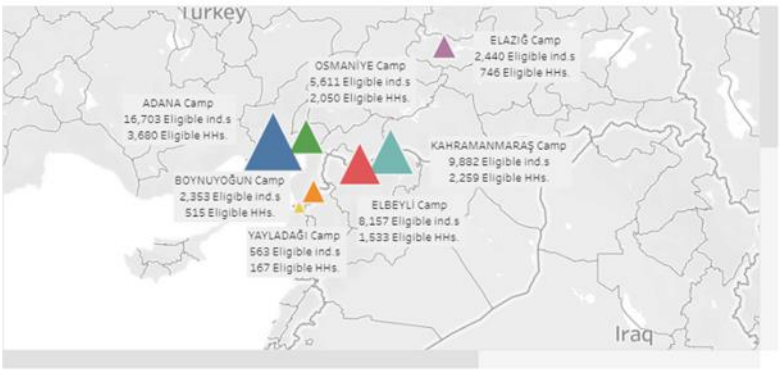




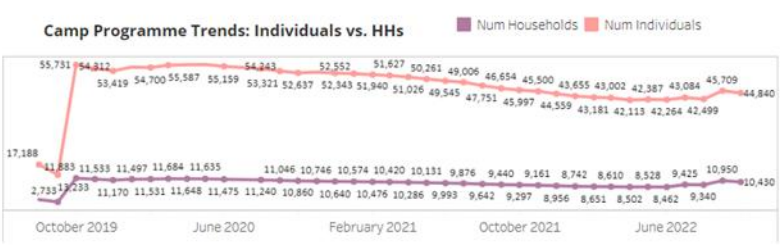


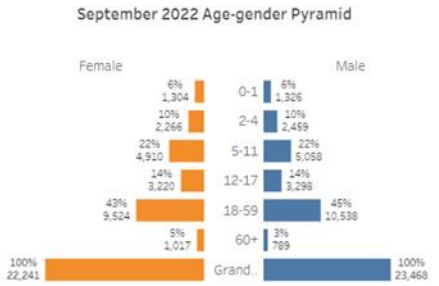
ANNEX 2

43,002 **Eligible** individuals, 8,610 **Eligible** households in January 2022



13 individuals in 13 households became ineligible due to the death or absence of the head of household as they exceeded the permitted limit of stay outside of the camp. TK informed PMM of these HHs and take necessary actions.





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