

Breathing space

The impact of the EU-Turkey deal on irregular migration

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Summary

The €6billion agreement reached between the European Union (EU) and Turkey on migration achieved a dramatic drop in the number of crossings and stopped a fast-growing criminal industry in its tracks. But smugglers interviewed for this paper are watching closely for signs of a change of tack, and not without reason. The Erdogan administration has been progressively at odds with the EU as it finds itself hemmed in by growing internal dissent, multiple terror threats and a failing economy. The breathing space provided by the arrangement is running out and the EU does not seem to have a credible alternative in the event of a collapse.

IN 2015, MORE than 850 000 people crossed the Aegean Sea – also known as the eastern Mediterranean route – from Turkey to the Greek islands, in a bid to seek asylum within the European Union (EU). This has been, so far, the peak of ‘Europe’s migrant crisis’, which has spanned the years 2011–16. The other major gateway for illicit migration to Europe has been through Libya and the central Mediterranean to Italy. But it is a distant second: in 2014, 170 000 migrants used this route, the highest number so far recorded and almost exclusively from sub-Saharan Africa.

As documented in a previous ISS/Global Initiative publication, ‘Survive and Advance: the business of smuggling migrants and refugees into Europe’,¹ the smuggling industry has served as a powerful vector in the migrant crisis, not only enabling illicit movement, but also increasing and shaping the demand for irregular migration. Human smuggling has become a critically important challenge for security and development actors. While smugglers offer opportunities – sometimes lifelines – to people at risk, at the same time, they have also been responsible for the abuse, extortion and death of thousands of those who hope to move. Furthermore, the resources that are generated through

the business of illicit migration, which Europol estimated to be as much as €6 billion in 2015 alone,² are being used to finance a broad spectrum of activities, including funding terrorist, insurgent and militia groups; generating profits for sophisticated organised crime networks; and financing corruption in states of origin, transit and destination.

As our previous research has clearly shown, the smuggling industry is by no means a homogeneous entity: it differs from place to place, and includes within it a range of players of varying degrees of professionalism and criminality. Smuggling markets develop around key hubs, and the market is shaped by a combination of levels of demand, challenges presented to migrants during their journey, and policies of governments and local control groups. Smugglers and smuggling markets are, however, interdependent, particularly when the level of prevailing demand for their illicit migration services is high. As one hub withers or declines, another will rise.³

Turkey's location means that for decades the country has been a central player in the migration system of the Mediterranean basin

Furthermore, dynamics in the Middle East and Africa are becoming increasingly interwoven, with ideological and identity-based insurgencies reverberating and amplifying each other.⁴ Across both regions, countries dealing with large-scale displacement and refugee populations are monitoring EU responses to the pressure faced by proliferating and uncontrolled migration across Turkey. It is for both of these reasons, therefore, that those concerned with stability, security and development in Africa need to be equally cognisant of major developments in Turkey as strategic gateway to Europe.

This research paper is therefore part of a broader programme of work by ISS, in partnership with the Global Initiative against Transnational Organized Crime and funded by the Hanns Seidel Foundation, to understand the contemporary landscape of mixed migration from Africa, and its short-, medium- and long-term implications. The paper is informed by the extensive experience of the paper's two authors and their organisations, as well as a broad literature review; a series of key informant interviews with policy makers, law enforcement officials, non-governmental organisations (NGOs), and humanitarian workers engaged with the refugee population in Turkey and in other countries neighbouring Syria; as well as independent academics and researchers analysing the EU migration crisis and its antecedents. It also benefits from a series of unique interviews with eight smugglers who are either presently or have recently been involved in the human smuggling industry in Turkey. These long-form, semi-structured interviews were challenging to secure and conducted on a confidential basis in May 2016. The names referenced in the paper have been changed to protect the identity of the smugglers accordingly. An overview of the profile of the smugglers is provided



ILLICIT TRAFFICKING ROUTES FOLLOW THE AFGHAN HEROIN TRADE, ESTIMATED TO BE WORTH US\$28 BILLION A YEAR

in Annex 1. Together, these interviews, informed by additional first- and second-hand research, offers an unprecedented insight into the rise, evolution and decline of the smuggling industry in Turkey during the period 2014–16.

A profile of human smuggling in Turkey

Turkey's geographic location means that for decades the country has been a central player in the migration system of the Mediterranean basin, and the evolution of migrant smuggling has been closely interwoven with the political economy of Turkey and the broader region. Positioned as the meeting place between Asia and Europe, and bisected by the Bosphorus strait, which connects the Black Sea to the Mediterranean, the country has been a natural trading hub for centuries.

Turkey sits at a strategic point on the 'Balkan route', a trading route that has long been used, not only by legitimate traders but also by people smugglers and traffickers of a variety of illicit commodities. The country has served as a funnel through which migrants from Central Asia and the Middle East – including Syria, Afghanistan, Bangladesh, Iraq, Iran, Palestine and India, as well as those from the Horn of Africa – must pass before they can get to Europe.⁵

But the commodity around which the illicit trafficking routes are predominantly orientated is Afghan heroin, which is estimated to be worth US\$28 billion a year.⁶ In the 1970s and 1980s, as the heroin trade increased to meet rising European demand, a convergence between organised crime and government interests brought about the phenomenon of the 'deep state' in Turkey, whereby senior politicians colluded and collaborated with organised crime groups. Politics is volatile in Turkey: since 1960, four governments have been forced out of office by military coups, as the military has become an alternative source of alliance for criminal groups. A number of scandals in the mid-1990s prompted a high-profile, United States-supported effort to tackle drug-trafficking and address complicity between politics and crime, but evidence remains of significant corruption at all levels of the modern state.⁷

Despite a certain amount of lip service to the contrary, as a political priority, tackling organised crime is given far less importance than the domestic 'terror' threat that

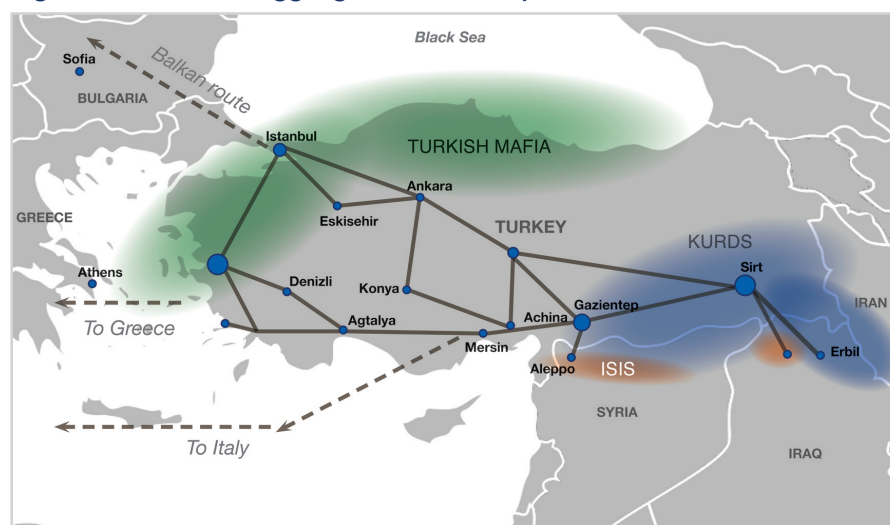
separatist movement the Kurdish Workers Party (PKK) presents. An estimated 20 million Kurds live in Turkey, representing 15–30% of Turkey's population, and their struggle for autonomy and self-determination have persisted for decades, despite a heavy-handed and repressive campaign of suppression by successive Turkish governments. Turkey has built up a massive military capacity on land, sea and in the air – the second largest in NATO – with a strong special forces contingent,⁸ which is used to quell domestic opposition and ensure the state's capacity in long-standing regional disputes.

Together, this combination of criminal resources, rampant militarisation, corruption and repression is deeply interwoven, and has contributed to a situation in which human rights and freedom of expression have suffered. Turkey is at the top of the list of countries with judgments against it by the European Court of Human Rights (ECHR). Between 1959 and 2015, the ECHR decided against Turkey in 3,182 cases.⁹ The failed coup attempt in July 2016 has given the government a mandate to shift more firmly towards authoritarianism and repression of civil liberties raising fresh concern among the international community for human rights breaches within the country.¹⁰

Turkey has built up a massive military capacity on land, sea and in the air – the second largest in NATO

Like the country itself, the organised crime groups that facilitate Turkey's criminal flows are ethnically divided, between the Turkish mafia, situated in the north of country bordering the Black Sea, controlling the economic capital Istanbul and the land border with Bulgaria; and the Kurdish mafia, based in the Kurdish stronghold provinces that sit on the southern land border with Syria and Iraq. However, unlike the political impasse, geographic necessity – the Kurds control the borders into the country, and the Turks the border out – and profits have required Turkish and Kurdish crime groups to cooperate to move goods through the country, with the result that criminal groups in Turkey have a well-established working relationships with one another,

Figure 1: Human smuggling and zones of protection



Source: Authors' own map.

but also with Eastern European groups that control flows further along the Balkan route. While predominantly predicated on heroin, aspects of these cooperative networks also facilitate human trafficking and smuggling of other contraband or illicit goods, depending on the opportunity.¹¹ Organised crime has therefore been well placed to profit from the rapid boom in human migration towards Europe.

Smuggling of migrants has a long history in Turkey, facilitating movement from Central, West and South Asia to Europe, and trafficking of women and girls from Russia and Eastern Europe eastwards to Turkey itself and to the Gulf states.¹² However, long-standing, smuggling and trafficking groups are by no means homogeneous, but comprise operations of various sizes that operate along the borders, with connections to the Turkish and Kurdish diaspora in destination states. The United Kingdom, Belgium, Germany and the Netherlands have historically been prevalent destination countries for people smuggled by Turkish networks.¹³ However, like all smuggling operations, the ability to recruit and manage migrants depends on a large number of recruiters, brokers and *samsars* (brokers) who mirror the nationalities of the people travelling.¹⁴

Turkey took centre stage in Europe's migration crisis in the summer of 2015, when migrants crossed the Aegean from Turkey to Greece in extraordinary numbers. From fewer than 12 000 people crossing by sea in 2013, the number rose to more than 50 000 in 2014 and then to 885 000 in 2015, of whom nearly 500 000 claimed to have come from Syria, 210 000 from Afghanistan and 90 000 from Iraq. In contrast, no more than 170 000 have ever used the Central Mediterranean route in a single year.¹⁵

In an effort to control this enormous flow, in March 2016 – a period where more than 1 000 people per day were taking boats from the Turkish coast to the Greek islands to make their asylum bid – the EU struck a deal with Turkey:

THE NUMBER OF MIGRANTS
THAT HAVE CROSSED
THE AEGEAN SEA
INCREASED FROM

< 12 000

IN 2013
TO

885 000

IN 2015

in exchange for accepting the return of all illegal arrivals and voluntary returnees from Greece to Turkey, the EU promised to pay Ankara €6 billion to help the Syrian refugee community in Turkey; to open the option of visa-free travel for Turks in Europe's free movement zone, the Schengen Area; and to 're-energise' talks about Turkish accession to the EU. It was also agreed that for each Syrian returned to Turkey, Europe would accept another Syrian living in a Turkish camp for resettlement in Europe.¹⁶

While the EU-Turkey deal focused exclusively on the sea route to the Greek islands, there are in fact three main human smuggling markets in Turkey. Their characteristics are quite different and can change over time, depending on a number of factors, including the people dominating the route at any particular time, the policies and priorities of the national and regional governments. Therefore, while the EU-Turkey deal may have contributed to a reduction in the number of people using one particular route, understanding the implications in the long term requires analysing the dynamics in other markets, and their relationship to routes outside of Turkey. The following sections provide an overview of the three main smuggling markets in Turkey, their evolution, the current state of the markets and the actors involved in them.

Izmir: a community enterprise

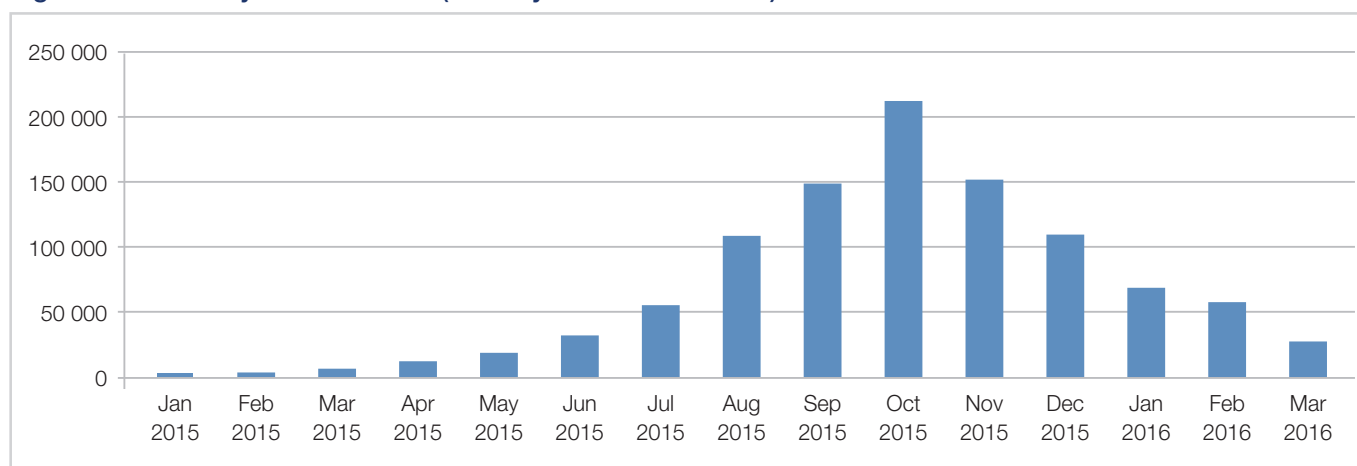
Turkey became the epicentre of the migration crisis in the summer of 2015, when a previously little used route grew suddenly and exponentially.

This route, known as the Eastern Mediterranean route, includes a sea crossing from Turkey to the islands off Greece and then a public or government-provided ferry to the Greek capital Athens. On arriving in Greece, migrants join the Western Balkan route, a long trek overland through Bulgaria, Macedonia, Hungary, Serbia and other eastern European countries into western Europe.¹⁸

Organised crime has been well placed to profit from the rapid boom in human migration towards Europe

This was not a new route. In December 2003, in one of the earlier documented disasters on this route, news agencies reported that an estimated 60 people had drowned in the Aegean after a boat carrying migrants from Iraq, Afghanistan and Jordan sank in mild weather.¹⁹ But the route had never before been used at the scale seen in 2015–16. A number of reasons have been attributed to its sudden prominence: Syrians started moving to Greece in large numbers in 2014, mindful that their chances of returning home any time soon were fading; the movement quickly generated its own momentum and was being advertised widely on messaging platforms such as WhatsApp and social media such as Facebook, as well as in mainstream media, which had easier access than they did to other migratory routes at sea; the relative ease of operating in Turkey at the time attracted a proliferation of small

Figure 2: Arrivals by sea to Greece (January 2015–March 2016)



Source: International Organization for Migration.¹⁷

smuggling gangs; the short distance between the Turkish coast and many Greek islands, which are often within sight; and finally, the announcement by German Chancellor Angela Merkel that *de facto* waived the EU's Dublin Regulation, which says that asylum seekers should seek protection and be processed in the first European territory they set foot on. This reinforced and amplified trends that were developing, and changed the game by facilitating movement through the Balkan states, whose policies towards migrants are far from welcoming.²⁰

Coastal communities and local merchants on both sides of the Aegean have re-orientated themselves to serve the thousands of migrants convening on their shores

Between June 2015 to March 2016, it would have been hard to find an industry more lucrative than smuggling refugees and migrants from Turkey to Greece. Part of its appeal was the ease with which the more enterprising could enter this booming market, including many drawn from the refugee community itself. Hamid*, for example, was a 23-year old Kurdish-Syrian from Damascus who we spoke to in Izmir. He is an unassuming young man, who sought refuge in Turkey with his parents in 2012. After years of working informally, mostly in the construction industry, he fell into smuggling by accident, working as a *samsar*²¹ in Istanbul:

Around February of last year [2015], a group of five friends from Damascus came to Istanbul and they were looking to leave for Europe immediately. One of the guys I worked with knew a smuggler who worked in Bodrum, and I put them in touch with him. I knew nothing about smuggling, but the smuggler told me to ask for US\$800 each. I kept the money and stayed in touch with them. They sent me photos of the trip and then called me from Greece. At that point I paid the smuggler and he told me to keep US\$100 for each one of them. There were five, so I earned US\$500. I couldn't believe it – it was more money than I made in a month!²²

Coastal communities and local merchants on both sides of the Aegean re-orientated themselves to serve the thousands of migrants convening on their shores. By October 2015, the month that was to prove the peak of the crisis, the smuggling industry was running like a well-oiled machine. Ad hoc alliances morphed into efficient small enterprises, as smugglers began to specialise in their roles, and reinvested early profits into growing and professionalising their businesses. Hamid described to us how he moved from Istanbul to Bodrum to join the first smuggler he had worked with, and was quickly made responsible for arranging accommodation for migrants:

My friend would rent a small house on the outskirts of Bodrum and I would stay with the migrants, make sure they had food and



THE AVERAGE SMUGGLING GROUP IS COMPOSED OF 1 TO 3 SUPERVISORS OR COORDINATORS

stayed all in one place while we waited for a signal that it was time to leave. Normally, the migrants would stay for two days in this accommodation, often for only one day. It depends on the weather he has the boats ready, on whether it's safe.

From what the smugglers told us in the six interviews we conducted with men who had worked on the Turkish coast, we learnt that the average smuggling group is composed of approximately one to three supervisors or coordinators, who are the main organisers and contribute the main capital to fund the infrastructure needed for smuggling: boats, cars, rents on accommodation where migrants are kept before the sea crossing. The rest of the crew are workers who transport the people by car, maintain and secure the accommodation as Hamid described, or manage the boarding of migrants onto boats before sending them out to sea. The number of workers depends on the size of the organisation. Some deckhands, such as Hamid, would also double up as *samsars*.

Mahmoud*, was the Palestinian coordinator for a medium-sized smuggling operation with 12 workers. For him, the coordinators were the most important part of the operation, each contributing something to the process:

One is Turkish, he owns a car agency, he provides the cars. He doesn't work. I'm the one that handles the whole operation. One contributes with the car, one pays the police and ensures the safety of the road. And I bring the people, the boats and the engines of boats. The money is divided three ways.²³

He claimed the coordinator responsible for security was also a member of the Jandarma, Turkish military police: 'He is a *commissaire* [ranking officer]. He is like me, he works with me. I provide him with the job, the candidates [migrants], with boats. He is my 'insurance' partner. He ensures that the passage is safe.'²⁴

While the *samsars* and coordinators might be of any nationality or ethnicity, all of the smugglers we spoke to emphasised that it is impossible to run a smuggling operation without having Turks in the crew to guarantee protection. Turac*, a Turk himself, worked as a coordinator in the largest smuggling operation that we had described to us. At its peak, he and his crew

were sending 20 boats a day to sea. But operations were controlled by his 'boss', a shadowy Turk based in Istanbul, who Turac intimated had connections to the Turkish mafia:

I meet my boss regularly, he does not like to talk on the phone. He tells me what to do and then I do it, and I tell him what is going on with the *samsars* and in Izmir. My boss has connections with the Jandarma and the police – that is not my responsibility. My boss handles that and when there is any trouble I call him. At the end of the week, I get a percentage of the money we made. I handle the Istanbul money. I keep my share and give him the rest. He also gives me a share of the money we make from Izmir.²⁵

A substantial but unquantifiable cost is protection money, spent in bribes to police, local officials, landowners and locals, required to ensure a trouble-free journey. In some cases, the protection money is accidental, as when smugglers are caught in the act by law enforcement officials who would have not been bribed. In such cases, smugglers normally offer bribes, which have to be negotiated there and then. Most of the smugglers we had access to could not or were reluctant to offer insights into this critical aspect of their business. Some said their boss, normally a Turk, took care of such matters. Like Mahmoud's *commissaire*, Turac's Turkish boss was the one who resolved problems – and for doing so he took the lion's share of the profits.

Prices migrants paid fluctuated over the course of the summer, but all smuggling crews followed a similar business model

As the scale of profits to be made increase, evidence of the involvement of Turkish organised crime muscling in on the trade, demanding protection money from boat crews, and closing down those operators who did not, or could not pay.

Prices migrants paid fluctuated over the course of the summer, but all of the smuggling crews followed a similar business model. As described by the smugglers we interviewed, and consistent with international media and police reports, and those of EU border agency Frontex,

passengers were charged between US\$900 and US\$1 300 depending on the season. In the summer, when demand was high, the price would go up; in winter it went down. The average boat would take 35–40 people; the *samsar* typically received US\$100 per person. The boat itself was worth around US\$8 000, plus a range of additional fixed costs for bribes, fees to the owner of the sending site, transport and accommodation. This meant that in high season, smugglers could have been earning upwards of US\$750 000 per week.

Table 1: The economics of smuggling from the Turkish coast

	High season	Low season
Revenue	(US\$)	
Per head	1 300	900
Number per boat	40	30
Revenue per boat	52 000	27 000
Boat departures per week	20	5
Revenue per week	1 040 000	135 000
Costs		
<i>Samsar</i> (per head)	100–200	100
Boat (per boat)	8 500	5 000
Sending site (per week)	7 000	2 000
Accommodation (per week)	500	300
Revenue per week	1 040 000	135 000
Total costs	170 000	32 800
Profit	869 000	103 700

Source: Estimates provided by interviewees.

Traffickers put people to sea with careless abandon in cheap dinghies manufactured in China and shipped over on special delivery. The flourishing trade injected new resources into the coastal towns, which rented accommodation to the smugglers, and sold food, clothing and mobile phone SIM cards to the migrants. Over time, criminal entrepreneurs organised what was previously disorganised, and expanded the criminal industry in new ways. Life jackets, mostly fake items that hardly provide any added buoyancy produced in small local factories with a migrant labour force, were available from virtually every other store in hotspots such as Basmane in Izmir. Even clothes stores got in on the trade, displaying fake life jackets alongside jeans, shirts, T-shirts and children’s clothing. Other stores sold authentic life vests that were clearly going to migrants about to cross to Greece. This included a shop owned by an honorary consul of France in Bodrum.²⁶ Turac’s crew also ran

> US\$750 000
per week

THE AMOUNT SMUGGLERS
COULD EARN DURING
HIGH SEASON

a life jacket factory in the Izmir area, a warehouse that employed two Syrian families, including their children. To recover the cost of the outboard motor, a system was worked out with crews on the Greek side:

There were people in Mytilini who would gather the motors and send them back and get a cut on each motor. There was a big business going on with the motors. We would buy back the motors for between US\$350 and US\$500.²⁷

Hundreds died every month – 686 in August, 268 in September, 432 in October, 106 in November and so on²⁸ – as flimsy, overfilled boats overturned and the combined rescue facilities of the Turkish and Greek coastguards, supplemented by ad hoc crews of NGOs, struggled to deal with the innumerable boats leaving every night in the dark. The smugglers we interviewed, who were working on the Turkish coast during this period, were all quick to emphasise that they had avoided taking risks with people's lives, and in the case of *samsars*, that they only worked with 'reputable' smugglers. Like the smugglers we were later to meet on the Syrian land border, they saw what they were doing as a social service, facilitating something that was necessary for their people, and while they made money, it was not all about profits. Haroun* explained it as follows:

I used to work in a shoe factory and I used to earn 1 000 Turkish lira (approximately US\$350) a month. I used to work 12 hours every day, including Saturday. And it's not enough for our family. Eventually I started doing some jobs in construction and got paid a bit more, but it was still not enough. In this way [smuggling], I could make a good living for me and my family, and I was helping people. The Syrians do not have a life here in Turkey, so they have to move on. Everyone wants to move on, and I was helping them to do this.²⁹

Turks themselves were lured towards the sudden and dramatic opening of 'fortress Europe' by way of the Turkey-Greece sea crossing. By late 2015, according to figures from the International Organization for Migration, Syrians represented less than 40% of the total number of people registered entering Greece from Turkey,³⁰ and the scale of numbers overwhelmed the capacity of

European states to respond and to tolerate the 'invasion', prompting urgent action.

In two phases, between November 2015 and March 2016, the EU negotiated the controversial €6 billion deal with Turkey described above in exchange for Turkey's efforts to control the flow of migrants from its coast. A key feature of the March 2016 negotiations, and one which served as a powerful deterrent, was the agreement that illegal arrivals to Greece would be returned to Turkey, and for each person returned, a legal Syrian asylum applicant would be accepted for resettlement to Europe. This was accompanied by the introduction of beach patrols by the Turkish army, road blocks along inland major routes with spot checks, and mass arrests of migrants and smugglers, which combined closed down the previously burgeoning smuggling industry along the coast. All arrests thus far have largely been of migrants themselves and low-level smugglers, rather than higher-level controllers and known organised crime figures.

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It is not only the actions of Turkey that have controlled the numbers of departures by boat. In reality the flow of people had already started to reduce before the deal was signed. In January 67 414 people crossed to Greece. In February that was down to 57 066 and again to 26 971 in March, even though the agreement did not come into effect until mid-March. In fact, the closure of the Balkan route had already deterred many asylum seekers, even before they were put off by the increased border controls and return scheme instigated by the EU-Turkey deal.

Arguably, it is the combination of these two factors that has ensured that, for the time being, the number of sea crossing attempts have gone down. The level of demand for movement remains incredibly high, and had the Balkans route remained open, it would have probably meant that the sea routes would have become riskier than ever with smugglers attempting to send people from unlikely sending spots. But for the moment, the market remains dormant, waiting for new opportunities or a change in the situation.

‘Between June and September, we used to send an average of 20 boats a day. Now we are lucky if we send one,’³¹ said Turac, the smuggler in the most professional of the crews we interviewed. When we asked whether operations were moving elsewhere, or looking into other routes, he responded with caution.

My boss is, everyone is waiting at the moment... to see how things will develop. The message is clear, if someone does something big that embarrasses the government, connections will not help you get out of trouble. So it's wait and see at the moment, we're all trying to figure out how it is going to develop and then we decide accordingly. Mersin is a possibility, but only if the authorities decide to close an eye. I think this talk about Mersin was a trap set by the secret service, but nobody fell for it. They were hoping someone would try it out and then they would make an example of them... to announce they caught a big fish.³²

Istanbul is estimated to have more than 400 000 registered Syrian refugees, and far more living outside of camps

The long-term viability of the EU-Turkey deal depends on many factors, not only the ability and interest of the Turkish government to prevent boats from leaving Turkish beaches, but also the efficient processing of returns from Greece. In this, the credibility of the compact is already being undermined. By May 2016, two months after the deal came into effect, not only had Greece failed to effectively return a single person, but the Greek authorities had rejected only 30% of the asylum claims they had processed, which fell far short of the expectations and hopes of policy makers who had expected to return a far higher number after Turkey was designated as a safe country.³³ Furthermore, when in late May 2016, a Greek court of appeal declared that a deportation order for an LGBT Syrian man was unlawful, the whole validity of the one-in-one-out agreement was called substantially into question.³⁴

Moreover, the EU-Turkey agreement extended only to the Aegean Sea crossing, not to other routes out of Turkey. Therefore, while the coastal market for transport by sea remains in stasis, and with the closure of the Balkan route and the EU-Turkey deal making registration in Greece unattractively risky, the result has been to re-orientate the market to the more expensive full-package solution: travel by air.

Istanbul: a global smuggling hub

Istanbul is an easy city in which to disappear. In the past 100 years, Turkey's first city and cultural capital has grown exponentially – from a population of around one million in 1950 to five million in 1980 and 10 million in 2000.³⁵ It currently stands at around 14 million, although some estimates put it as



WITH A POPULATION OF
14 MILLION, ISTANBUL IS ONE
OF THE WORLD'S TOP
20 MEGACITIES

high as 17 million, making it one of the world's top 20 megacities.³⁶ According to government projections, the population is expected to grow to 16.5 million by 2023.³⁷

Istanbul is estimated to have more than 400 000 registered Syrian refugees, and far more living outside of camps. The city has sizeable slums and shanty towns where people of all nationalities exist, drawn to the city's informal economy. The population of Syrian refugees exacerbates problems of unemployment, job insecurity and reduced day labour rates for those working in the informal sector, particularly women. An empirical World Bank study found that the inflow of informally employed Syrian refugees has led to large-scale displacement of Turkish workers from the informal sector, at a rate of around six natives for every 10 refugees.³⁸ Thus the shift into lucrative employment in illicit activity becomes all the more attractive for those in the most vulnerable sector of the economy seeking to earn a living.

Istanbul is one of the primary hubs where migrants and smugglers of all nationalities connect and negotiate onward journeys, defined by the purchasing power of prospective migrants. As we saw, brokers such as Hamid first recruited clients for the sea voyages in Istanbul, arranging for them then to be transported and put up in accommodation on the coast.³⁹ More prominently, however, Istanbul has become the hub for those seeking the 'full package' to fly to Europe.

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Istanbul's Atatürk airport is the single most significant departure point for air traffic to Europe, accounting for roughly 6.5% of total air traffic into the EU, and this has been growing steadily since 2010. In parallel with the growth of legitimate air traffic, therefore, and partially driven by Turkish Airlines' expansion into new routes in Africa and the Middle East, Atatürk has also long been an important hub for irregular migrants travelling by air to several EU member states.⁴⁰

Since the collapse of land and sea borders, the emphasis on air travel has become even more pronounced.

With few legal options available, Turkey has become a hub for document fraud and counterfeiting. Turkish organised crime groups have long been associated with fraudulent document rings across Europe.⁴¹ Besides outright forgeries and falsifications, which are often the easiest to detect, legitimate visas and passports have been fraudulently obtained, stolen, rented or sold to smugglers by tourists or members of migrants' families or communities, who then report them as lost or stolen.⁴² In 2015, EU member states detected and reported a total of 8,373 cases of document fraud at border points, the majority of which were users arriving from Atatürk airport. The second highest was from Istanbul's second, budget airport, Sabiha Gökçen.⁴³

Migrants are purchasing European passports to board planes, and Syrian passports to increase the likelihood of their asylum applications being granted on arrival. German officials have estimated that one-third of asylum seekers in Europe are fraudulently claiming to be Syrian.⁴⁴ Abu Hafez*, a 24-year-old Syrian from Aleppo, shifted into the air travel industry after the smuggling market on the coast closed down. He said, 'People travel by plane from Turkey to Germany, France, Spain, Italy... for each person we ask €8 000. We give [them] a fake European passport, we make trips from any airport.'⁴⁵ When we asked him how they can be confident of the documents they supply, he explained:

We make several attempts. Once, twice, and if they fail, we decide to pay the person that works at the airport. We make an agreement with one person, we tell the people that work at the airport, 'We will bring you these people', they agree and let them pass.⁴⁶

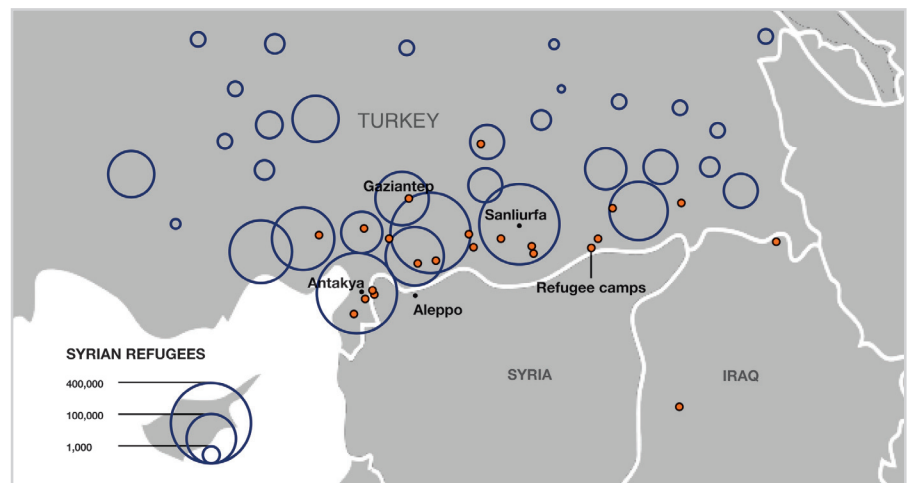
As this example shows, bribery by smugglers is integral to ensuring the success of the smuggling operation. Widespread corruption has greatly contributed to making Istanbul a hub in the illicit global economy, and increased the challenge of clamping down on the trade. It is pertinent, for example, that while the European governments detected some 529 cases of document fraud originating from Turkish airports in 2015 – which is already a very low rate given estimates of the scale of the problem – over the same period, the Turks themselves detected only six.

Gaziantep: a war economy

Turkey shares a 1 580 km land border with Syria, a line that cuts through a maelstrom of complex politics, diverse interests and changing alliances, where Kurdish separatists mix with militants of Islamic State in Iraq and Syria (ISIS), an evolving and fragmenting coalition of Syrian rebel groups, the Turkish army and Syrian regime. Historically, this border has been highly permeable, with goods and people moving freely across it, and with the onset of the Syrian civil conflict in 2011, Turkey became the first port of call for Syrians in the north of the country fleeing the war.

According to the United Nations High Commissioner for Refugees (UNHCR) in June 2016 2.75 million refugees were registered in Turkey. These were predominantly, but not exclusively, Syrians who had fled the five-year conflict that raged just over the border. Only about 270 000 Syrians live in camps that the Turkish government runs.

Figure 4: Syrian refugee camps and populations near the Turkish border



Source: The New York Times.⁴⁷

Although most cannot work, Syrians have access to health care and basic needs, unlike asylum-seekers from other countries who have virtually no entitlements. There are 22 refugee camps, most of which sit along the border, each housing between 3 000 and 25 000 people each. Residents there need a permit to leave.

The remaining 85% of Syrian refugees, who number more than 1.5 million, live freely in Turkey, trying to eke out a living in the country's informal economy, without support from the international community. Under Turkish law, Syrian refugees have temporary protection status, which gives them access to health and education through a provisional identity card. But they do not have internationally recognised refugee status, and often the social services that are entitled to are hard to access. Recently, the government announced plans to offer Syrians residency in Turkey, a move that started an acrimonious debate, which was only drowned out following the July coup attempt.⁴⁸

IN JUNE 2016

2.75 million

REFUGEES WERE
REGISTERED IN TURKEY
ACCORDING TO UNHCR

While the United Nations tries to provide support, the scale is unmanageable and the funds the international community provides are insufficient. In 2016, UNHCR appealed for US\$807 million, but by mid-year it had only received 25% of funds. Thus the burden of catering for the refugees has fallen on the Turkish government. President Recep Tayyip Erdogan estimates that this has already cost US\$7.5 billion, with ongoing costs of US\$500 million per month.⁴⁹

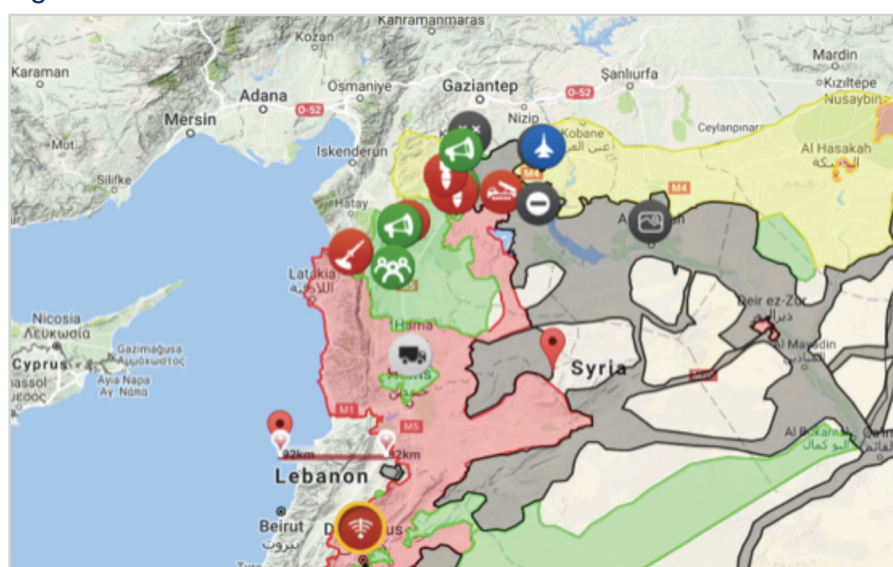
Before March 2015, the border was open for all manner of cross-border movement, and cross-border trade and smuggling underpinned the local war economy for all parties. The southern Turkish city of Gaziantep became the entrepôt for licit and illicit trade between Turkey and Syria. According to the Gaziantep Chamber of Commerce, hundreds of companies have been registered in the past four years to ship food and other essentials across the border into Syria.⁵⁰

Although most cannot work, Syrians have access to health care and basic needs, unlike asylum-seekers from other countries who have virtually no entitlements

Throughout this period, ISIS completely infiltrated Gaziantep and neighbouring hubs such as Sanliurfa and its operatives killed Syrian anti-ISIS activists in broad daylight.⁵¹ Gaziantep is also said to be a hub for trafficking Syrian artefacts and antiquities that ISIS has stolen, with informal auctions organised before goods are shipped to their buyers from Turkey's southern coast.⁵²

Local politics is complex, with the Syrian army, Turkish army, rebel groups and ISIS all active in controlling different parts of the border, in patterns that change over time. Humanitarian agencies in Turkey are forced to maintain

Figure 5: Control over a contested border



Source: Liveuamap, 18 September 2016.

US\$7.5 billion

THE ESTIMATED COST TO THE TURKISH GOVERNMENT OF CATERING FOR REFUGEES SO FAR

weekly maps that indicate how territorial control has shifted, to understand how and with whom they need to negotiate for access to deliver aid.⁵³

Everyone moving licit and illicit goods pays taxes to the groups that control the territory. Each group has a different policy, and as noted above, territorial changes happen rapidly and often, so smugglers also need to monitor the situation closely. Hamza*, a 31-year-old smuggler from Idlib told us, for example:

You only pay when you are with the Kurds, when you have a checkpoint of the Kurds you have to pay. It was around 1 000 Syrian pounds, it's like US\$2–3. And now it became 3 000 Syrian pounds, it's about US\$7–8. When you get to a checkpoint of the Free Syrian Army you don't have to pay. But for Daesh [ISIS] you can't go there. Nobody goes there.⁵⁴

The smuggling market has segmented into a hierarchy of goods that different smuggling groups control. Food and basic supplies – which frequently include diverted humanitarian assistance – are at the bottom of the pyramid, as is the historic and diffused practice of cow smuggling from Syria to Turkey. Ahmed*, a 31-year-old Syrian, had been a smuggler since he was 12:

I used to smuggle cows from Khirbet Al-Joz to the Turkish side. We would go on trucks with the cows from Aleppo. Once we arrived at Khirbet Al-Joz, I would get off and take two cows and walk two to four kilometres with the cows. I would meet a Turkish man on the other side and he would give me US\$300 for each cow. I kept US\$15 each and gave the rest to my boss. In this way I earned US\$100 a month.⁵⁵

Fuel smuggling was one of the most endemic and lucrative illicit trades on the Syria-Turkey border, with thousands of barrels being moved across the border, with a 100% profit margin or more.⁵⁶ As Hamza explained to us, before becoming a human smuggler, he learnt the art of evading the border smuggling fuel. Initially, he explained, this was not a covert activity:

In 2012, the people of Idlib or Deir iz-Sur started to smuggle fuel from Syria to Turkey because they [the rebels] had cut the fuel supply to the Syrian regime. But then they [the Turkish army]

started to shoot at the cars that were smuggling the fuel. There were even cases when they started shelling some cars. People's cars were burning and some people died so this whole operation was stopped.⁵⁷

Cigarette smuggling was also a highly prevalent and lucrative: in 2015, the largest share of illicit cigarettes reported was smuggled across the EU borders from Turkey, numbering more than 228.7 million individual pieces.⁵⁸ While illicit cigarettes are easy to buy, cigarette smuggling is a specialist trade, restricted to specific networks that monopolise the routes through areas not controlled by ISIS or Wahhabi rebels such as Jabat al-Nusra, where smoking is *haram* (forbidden).

Since March 2015, the 565-mile land border between Syria and Turkey has been closed

The same principles of control have applied to human movement, prompting the development of a lively trade in falsified documents along the border. In the first years after the revolution, the border was open to Syrians who used to make their way to Turkey by their own means but as border control increased so did the market for smugglers; initially to provide documents and eventually to facilitate the journey itself. Abu Hafez began his career in the smuggling industry in Kilis, the town nearest the border in Turkey, on the road between Aleppo and Gaziantep: 'In Kilis, I used to falsify documents: passports, university diplomas, ID cards... I had a partner. For a fake passport it was US\$1 200 for a university diploma, I would earn US\$100.'⁵⁹ As he explained, his trade helped the cross-border economy to flourish as the war continued and border controls increased, and it became harder to get an official permit to cross the border:

Sometimes, people would turn to use false passports because Syrians simply couldn't obtain an official one because they lived in territories considered to be rebel areas, or because they had taken part in the resistance and therefore feared approaching a passport office. Others had documents forged to pretend that they were aid workers, and need to come and go.⁶⁰

Since March 2015, however, the 565-mile land border between Syria and Turkey has been closed: the Turkish army patrols between the dedicated border crossing points, and two walls of barbed-wire fencing demarcate the entire length of the border, with land mines in between. Smugglers thrive on both sides of the border; given the complexities of the conflict, refugees often need smugglers to move more safely within Syria itself. Given the level of demand, and the long duration of the conflict, the human smuggling industry is relatively well organised. Ahmed said of his home city Aleppo:

There are many *samsars* working in Aleppo. Some even have offices⁶¹ and they give work to the people doing this business. They would have the contact numbers of different people [smugglers, scouts, drivers], if one cannot make it, they call another one. There are hundreds involved in this work in Idlib and Aleppo.⁶²

Some smugglers, such as Hamza, specialise in movement within Syria and to the border with Turkey. As he recounted, 'I will pick up a person from any free zone in Syria and drive them to the Turkish border. There I will deliver him to my partner who will take care of them once in Turkey.'⁶³ Syrian scouts accompany the migrants to the actual border on foot, and Turkish scouts pick them up on the other side. The Syrian smuggler will monitor the progress of his group by WhatsApp or by phone.

Figure 6: An airstrike by the Turkish airforce on ISIS positions



Source: authors.

Figure 6 shows an airstrike by the Turkish air force on ISIS positions about 50 km from a refugee camp in the border town of Kilis during our interviews there. The plumes of rising smoke are circled.

Migrants' experience at the Turkish border depends, as with all things in this troubled region, on the individual ethnicities and alliances of the specific army officers on duty. Ahmed, recounted:



SMUGGLERS MONITOR
THE PROGRESS OF THEIR
GROUPS BY WHATSAPP OR
BY PHONE

One time, we were crossing from near Azmarin, it was the last part of the journey, close to the border. It was early in the morning, about 5 am, and we were walking when we heard bullet shots nearby. We were 15 people, including six children, but they kept shooting at us, even when we ran back... they were shooting low to hit someone.⁶⁴

A relatively small minority of about one million Turks are Alawites – a branch of Shi'a Islam to which Syria's President Bashar al-Assad belongs. Around 20% of Turkey's Muslims are Alevi, a denomination that shares the same central precepts as the Alawites. Whereas Turkish Alawite soldiers sympathetic to the Syrian regime have been known to shoot at refugees, including women and children, others have reportedly made small care packages of food and clothing to give to the fleeing people as they have ushered them discreetly through. The number of refugees stuck behind the closed border is in the tens of thousands,⁶⁵ rising sharply after attacks or bombings of specific cities.⁶⁶

According to estimates from smugglers working on the Turkey-Syria border, the costs of smuggling can vary a lot, depending on conditions, and where on the border people are trying to cross, but in essence, smugglers such as Ahmed or Hamza rarely make more than US\$100 per person for what is increasingly a life-threatening journey.

Table 2: Indicative fees paid by smugglers

Revenue	Range (US\$)
Per head	300–600
Costs per head	
Driver	50–100
Scouts (for a pair)	50–80
Field owners	20–100
Turkish smuggler	150–250
Total cost	270–530

The cost of smuggling also increases on the Turkish side of the border, thanks to increased surveillance and tension. As Hamza explained:

It used to be 1 000 Syrian pounds per person, now it's 3 000 Syrian pounds (US\$2, now US\$6). I used to take very little from people [for my services]: now the whole operation costs more or less US\$300. It used to be less, around 10 000 Syrian pounds (US\$15-20), but since the new measures were put in place and Turkey is doing tougher controls at the borders, the price went up. We have to pay every chain of the operation more: to rent a Turkish car is now about US\$100. We now pay about US\$75 for a Turkish person to hide the



SMUGGLERS RARELY MAKE MORE THAN US\$100 PER PERSON FOR WHAT IS INCREASINGLY A LIFE-THREATENING JOURNEY

smuggled person at his house. The owner of the territory that we cross also wants more. This job is forbidden, but people have to leave.⁶⁷

Control over the border is tightly bound up with Turkey's fight against terrorism, an issue that is politically heated and constantly evolving. Whereas before the spring of 2016, despite Turkey's official opposition to the group, analysts described an accommodation that existed between Turkish authorities and ISIS. In 2015, Jonathan Schanzer noted how ISIS:

benefits greatly from illicit oil sales to Turkey, the flow of foreign fighters, cash and weapons over the border into Syria, and a rather permissive environment in south-eastern Turkey, where authorities don't seem terribly alarmed over the presence of extremists.⁶⁸

However, this perceptibly changed following the closure of the Syria-Turkey border. ISIS accompanied escalating rhetoric against Turkey and the Erdogan government with a flurry of well-placed terrorist attacks in the country's major cities, including Ankara and Istanbul.

On 12 January 2016, a suicide attack in Istanbul's Sultanahmet Square killed 13 tourists. On 15 March, a bomb in Ankara killed 37 people; another on the 19 March in a popular tourist market in Istanbul killed six people; and on 28 June, a gun and bomb attack in Atatürk airport killed more than 40 people. Meanwhile, more than 20 people died in the border town of Kilis from sustained mortar fire from ISIS positions in northern Syria between February and May.⁶⁹ ISIS did not claim several other attacks, which were not as high profile or did not directly target the government.⁷⁰ This was the first time that ISIS had directly targeted its former ally, which was in part driven by Ankara's decision to join the anti-ISIS coalition in September 2014, but also due to the border closure, which curtailed the group's access to fighters and funds.⁷¹

Terrorist attacks in its main cities, road blocks along major roads to prevent smugglers moving toward the coast, increased military patrols in its most famous beach towns, and the presence of coastguard and North Atlantic Treaty Organization (NATO) warships have together presented a massive constraint to Turkey's tourism industry, which is a critically important part of

the country's economy. In 2015 tourism and travel was estimated to have contributed US\$86.6 billion or 12.6% of Turkey's gross domestic product (GDP) for that year. The sector employs 2.2 million people, representing nearly 9% of Turkey's employed workforce.⁷² This exacerbates economic pressure on Turkey that was already strained by hosting the refugee population and the competition that the unregistered Syrians presented to the domestic labour market, reducing the availability of low and unskilled labour and reducing day rates.⁷³

Conclusion: an industry in waiting

The result is that tensions are running high in Turkey. Without an end to the conflict in Syria, it is hard to see a sustainable or peaceful resolution to what is essentially becoming a stand-off between the Turkish government, various interest groups within the country and in Syria, the EU, and the refugees, who have become a bargaining chip in the middle. The attempted coup in July 2016, while it was quickly suppressed, clearly signalled simmering tensions in Turkey and the fragility of the status quo.

Measures put in place to address irregular migration through Turkey do not address the issues that prompt displacement

Regrettably, the inherent insecurity that is associated with large populations of refugees who are caught in a protracted displacement situation where they are improperly cared for must be recognised. Even given the best possible care, refugee status and camps were only ever designed to be temporary protection measures, not a way of life for generations. Unable to build a meaningful present or a sustainable future, frustration mounts. The case is the same in other similar situations, such as in East Africa and the Horn of Africa, where refugee camps have become breeding grounds for discontent, crime and terror, and prime recruitment spots for smugglers. None of the measures that have been put in place to address irregular migration through Turkey do anything to address long-term issues that prompt displacement. In fact, such measures may even exacerbate them.

Erdogan's clamp-down on smuggling cannot be expected to be maintained without addressing the 2.7 million refugees already in the country whose

resilience is wearing critically thin. The pressure from newly displaced people is building up on the Syrian side of the border with every bombing campaign. The closure of the border has reduced the level of the flow into the country, but has done so at the cost of antagonising ISIS, prompting terrorist attacks of increasing viciousness within Turkey. With a burden of care for the refugees estimated at US\$500 million a month, the Turkish economy will suffer as the tourist and travel sector becomes further constrained, and this will exacerbate the vulnerabilities of Turkey's own citizens.

In the meantime, despite the controls, the smuggling industry continues to thrive. While it may be reduced to a trickle on the Turkish coast, the industry is waiting to resume operations. As Hamid told us:

We ran a life jacket factory in the Izmir area: a warehouse that employed two Syrian families, including their children. It was raided in February, but by then demand had already started falling. But we will lay low for a while, and restart if there is an opportunity.⁷⁴

Given the economic importance of smuggling and the level prevailing demand, the industry continues to thrive in different forms

Haroun confirmed that 'I still have some customers who ask me about the situation who are waiting for the way to be opened again.'⁷⁵ As this report goes to print, Greek authorities have reported 3 000 arrivals a month for the last three months.⁷⁶

For smugglers and their clients, smuggling is an essential release valve from dire situations, and an important economic boon. Many of the smugglers who we interviewed were proud to be part of an industry that offers people a critical lifeline where few legitimate alternatives exist. In the words of Hamid, 'I feel proud because I have helped many people get to a better life in Europe. And I am doing this to support my family. I saved a lot of money and am keeping it for them.'⁷⁷ Ahmed, smuggling along the Syrian border with Turkey, agreed with his compatriot: 'Everyone has a family, and I need to survive, but I don't do it only for the money. These are my people, I helped hundreds of people cross in this way.'⁷⁸

Given the economic importance of smuggling and the level prevailing demand, therefore, the industry continues to thrive in different forms. For smuggling along Turkey's land border with Syria, the situation is more urgent than ever, and the added risk means that smugglers charge premium prices to desperate refugees.

There has been no evidence of direct displacement from Turkey to other sea routes in Egypt and Libya. It is mainly sub-Saharan and North African migrants who are departing from Libya; hardly any Syrians were registered using this route in 2016. However, an incremental build-up in Egypt has taken place over the past year. The Egyptian Armed Forces appear to have contained the situation,



MANY SMUGGLERS ARE PROUD TO BE PART OF AN INDUSTRY THAT OFFERS PEOPLE A CRITICAL LIFELINE

but any change is likely to affect the wider region, in Turkey and eastern Libya. Smugglers we have communicated with have indicated they are monitoring the Egyptian situation very closely.

Another development that analysts of African migration should take note of is that the perceived success of the EU-Turkey deal has led the EU to propose similar deals to key African states whose citizens number high in the arrivals figures, principally the states of the Horn of Africa. In June 2016, the EU launched its *New Migration Partnership Framework* with 16 countries in Africa and the Middle East, under which agreement the EU reframed development and trade cooperation under the sole principle of migration control, and emphasised that 'there must be consequences for those who do not cooperate on readmission and return'.⁷⁹

In the meantime, however, the costs of this overwhelming focus on migration control at the behest of the EU, managed alongside domestic priorities of countering terrorism and addressing the Kurdish question, are affecting Turkey's long-term stability, democracy and economy. The migration debate has forced European leaders to normalise the attempted coup and the Turkish government's heavy-handed and authoritarian response, which they would normally decry. Low-level smugglers, used to higher returns, are resorting to petty crime to replace lost income, while the more sophisticated are shifting into counterfeiting and the full-package industry, which requires a far higher level of corruption.

While even the most intractable wars end, the economic systems that enable conflict or making a profit from the chaos are typically far more durable, and this will have implications for the capacity to control the movement of other illicit trades. Turkey's geographic location will always make it pivotal to the stability of states in the region and of Europe. Therefore, all stakeholders should be invested in promoting a modern, free, democratic and accountable Turkish state, and should champion these values over the excessive securitisation of migration controls.

While even the most intractable wars end, the economic systems that enable conflict or making a profit from the chaos are typically far more durable

Realistically, the breathing space the EU-Turkey agreement provided is running out. Erdogan has indicated his impatience with the EU's failure to complete what he perceives to be its side of the bargain, and has threatened on a number of occasions to terminate it.⁸⁰ The authoritarian response of the government to the July coup attempt, including the possible reinstatement of the death penalty, has increasingly polarised EU member states and Turkey.⁸¹ The EU has shown little evidence that it has alternative strategies in place once the deal crumbles, and Turkish surveillance of coastal routes is relaxed. The reopening of the floodgates along the Aegean route seems inevitable.



TURKEY'S GEOGRAPHIC LOCATION WILL ALWAYS MAKE IT PIVOTAL TO THE STABILITY OF STATES IN THE REGION AND OF EUROPE

Annex 1: Profiles of smugglers interviewed

1. Mahmoud*, 28, Palestinian from the Gaza Strip. Interviewed in Izmir, 8 May 2016. A smuggler for most of his adult life, now working as a coordinator in a mid-sized smuggling operation.
2. Haroun*, 22, Syrian from Homs. Interviewed in Izmir, 8 May 2016. A risk-averse, low-level smuggler who recruited migrants for a small smuggling crew. He quickly left the market as soon as there was risk and claims he is unlikely to return.
3. Abu Hafez*, 24, Syrian from Aleppo. Interviewed in Izmir, 6 and 8 May 2016. Having been injured fighting for the Free Syrian Army, he now works as a *samsar* in Izmir and prides himself on smuggling as a humanitarian service.
4. Hamza*, 31, Syrian from Idlib. Interviewed by phone from Idlib, 10 May 2016. A catch-all smuggler, working on the Syrian side of the border transporting and coordinating logistics.
5. Turac*, 29, Turkish from Istanbul. Interviewed in Istanbul, 14 May 2016. Works as a coordinator, fixer and money-holder for a large smuggling operation.
6. Hamid*, 23, Kurdish-Syrian from Damascus. Worked as a *samsar* and then as a low-level smuggler, who began opportunistically but has been working his way up in a relatively small smuggling group operating in Istanbul and Bodrum. He was interviewed on May 13 in Istanbul.
7. Ahmed*, 31, Syrian from Aleppo. Interviewed in Gaziantep, 11 May 2016. A long-time cross-border smuggler who turns his hand to the most lucrative commodity available.
8. Abdullah*, 27, Syrian from Homs. Interviewed in Bodrum, 12 May 2016. A refugee himself, he got caught into the boat smuggling because he could find few other alternatives to support his family. Now he trades small boats.

Notes

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