

THE NEW THRESHOLD OF POST-DISASTER RECOVERY

EARTHQUAKE REGION FROM THE PERSPECTIVE OF RELOCATION

DISASTER SERIES | NO:7

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Foreword: The Chronology of Witnessing

February 2023: I vividly recall receiving the news of the earthquake, and my desperate attempts to reach friends in the disaster zone as the hours unfolded. A text from one of them still sits on my phone: “Regrettably, I am in Istanbul.”

In the wake of a devastating earthquake, we would naturally expect someone to be relieved that they were not in the stricken city, wouldn't we? Well, not really. That message lays the profound grief and helplessness of being away from one's own city during a catastrophe—of being rendered unable to aid family and neighbors. To put it in the lexicon of an economist: it reveals the social capital.

April 2023: Seven weeks after the earthquake, I was on the ground in the disaster zone. Despite the overwhelming influx of images in the media, it was during this visit that I realized I had not truly grasped the sheer scale of the devastation. The eyes witnessed it, but the heart could not bear it, and the mind simply failed to comprehend.

Immediately upon my return, I wrote in my report that “... considering emotional linkages, we should not limit the impacts of disaster with certain cities and we should note that the whole country has been affected by this tragedy.” I underscored that the responsibility of recovery lay on the shoulders of the whole country, not just those directly affected (Ünüvar, 2023).

April - August 2024: Insisting on being agents of change, we voluntarily took on the responsibility of reminding people of the cold facts about disasters, the need for disaster preparedness and the urgency of working in solidarity with the parts of the country affected by the earthquake. For this purpose, we committed to a research agenda in which we would conduct field visits and write a report about the zone damaged by the earthquake every year between 2024 and 2026.

Following our field engagements in the disaster zone that April, we declared in our report: “An earthquake year is not just a single year.” (Tur, 2024). We stepped up, taking full responsibility to ensure that this issue would remain at the forefront of our attention until every single wound had healed.

June 2025: More than two years after the earthquake, what we witnessed during our third visit to the disaster zone made it painfully clear that there was still work to do.

and 2026: Once again, we were on the road, and once again, out in the field. The number of damaged structures had visibly decreased, with more buildings now habitable. Ground has been gained, yet the road ahead is long.

And yet, the fact remains that we are economists, not chroniclers. To go and to see is indeed

part of our work, but our duty is not limited to merely reporting what we observe. As development bank economists who declare, “We will leave no one behind,” our job is to propose targets and engineer solutions. The target we propose is clear: to resurrect not only the physical infrastructure but also the social capital.

This is precisely why we attach immense importance to the recovery of the employment structure in the earthquake-affected provinces. We believe the region must not merely regain its pre-disaster strengths, but must layer upon them new skills, investments and industries. As a cohesive whole, the region must reclaim the human capital it lost in the wake of the disaster.

The solution, naturally, lies in enhancing the region's pull factors. What can these ***pull factors*** be? Sustainable job opportunities, civil infrastructure and roads that do not flood in the rain, disaster-resilient housing, offices, social facilities, planned urban green spaces, accessible and widespread cultural events, a robust public education infrastructure, regenerative agricultural practices and a farming approach integrated with carbon markets, high-tech investments designed to actively support services exports...

Does this list strike you as excessively long and detailed? It shouldn't. In the lexicon of the United Nations, these should be non-negotiables for decent work and a dignified life. Everything I have listed consists of tasks to be undertaken for humanity—and alongside humanity. That is why this report zeroes in on “***relocation***” and underscores the imperative to prioritize the pull factors outlined above.

Our subject matter is, of course, disaster preparedness and the post-earthquake recovery. Yet, above all else, our subject matter is social capital. I have therefore stood by the description of the vulnerability factor which I set out two years ago: Being out of sight and out of heart will be the most vulnerable. This is exactly why keeping the disaster zone close to our hearts is simply not enough. Going there and being physically present matters...

Today, I raise the stakes on that very text. Going there and being present is no longer enough; staying there is what matters. Creating the “pull factors” that make staying desirable—and investing heavily in them—matters even more.

Since the earthquake, time has moved quickly for some, but agonizingly slowly for others. Yet, one reality remains absolute: life waits for no one. This report has been crafted by those who understand that the flow of time must not merely be observed, but actively managed. This report was prepared so that the remaining days on the calendar are not left to chance - because those who govern the present, govern the future.

Burcu **ÜNÜVAR**, PhD

Director / Chief Economist

Introduction



In our reports focusing on the earthquake region published in recent years, we have examined post-disaster recovery from different but complementary perspectives. In this context, in our report titled *“Comma: An Earthquake Year Is Not a Single Year”*, we discussed the opportunities that could emerge from positioning the earthquake region as a green economic area and directing it towards environmental products, while providing a framework for long-term development (Tur, 2024). In last year’s report, *“Raising the Future: A Human-Oriented Breakthrough for Social Transformation in the Earthquake Zone”*, we further underlined that the post-disaster recovery extended beyond the reconstruction of destroyed physical structures and that a lasting recovery would hinge on the renewal of social capital, including trust, cooperation and a sense of belonging. We emphasized that if the recovery was to be sustainable, people must be able to re-establish their connection with the cities they live in and develop a shared perspective on the future (Avcioğlu, 2025).

In the final year of TSKB Economic Research’s three-year research agenda on the earthquake region , we are now taking this discussion one step further. While the immediate response phase is largely behind us, the spotlight is now turning to the quality of reconstruction work. The question no longer concerns the extent to which the region can regain its pre-earthquake production capacity, but whether it can transform this capacity and evolve towards a higher value-added production structure.

This issue brings into focus the relocation¹ from the perspective of the earthquake-affected region. This is because the region’s transition towards a higher value-added production structure depends not only on preserving existing production capacity, but also on new investments being directed to the region. Türkiye’s new incentive system² supports this process at the policy level by encour-

¹In its broadest sense, relocation refers to firms’ decisions to locate their production activities or new investments to a different geographical area. In this study, the definition of relocation also encompasses the decisions taken by individuals to change where they live or work.

²<https://www.resmigazete.gov.tr/eskiler/2025/05/20250530-2.pdf>

raging the geographical reallocation of industrial investments. However, the relocation is not a process shaped solely by financial incentives; the production ecosystem, human capital, educational infrastructure and living conditions all play a decisive role in the sustainability of these decisions (Akyıldız, 2025).

These factors bring the issue of human capital to the forefront of attention for the earthquake region in particular. Migration flows following the earthquake, disruption to education processes and changes in everyday living conditions have all had a direct impact on the region's skilled labor capacity. The growth potential of existing investments and the quality of the production base required for new investments also directly affect this capacity. Technical know-how, specialized labor and the educational opportunities, social amenities and institutional collaborations that support the development of this workforce become increasingly critical, especially in high value-added production.

This report focuses on understanding the role of human factor in the context of relocation in the restructuring of the earthquake-affected region towards higher value-added production. As in previous years, the TSKB Economic Research team conducted a field visit³ to the earthquake region this year, where we visited Kahramanmaraş, Adıyaman, Şanlıurfa, and Hatay in April 2026 and spoke to business representatives, local institutions and academics. Our discussions revealed that investment decisions have been shaped not only by incentives and production costs, but also directly by the quality of human capital, access to education, living conditions and the broader social environment. At the same time, our field visits also suggest that some actors are seeking to address existing human capital constraints as part of the investment process itself. These initiatives to develop their own workforce locally and create new production ecosystems provide compelling examples of how human capital is not only a prerequisite for investment decisions but also a source of capacity that can be developed throughout the investment process.

The first section of the report examines the relationship between post-disaster recovery and relocation. The second and third sections assess the economic outlook of the earthquake region over the past more than three years, along with migration dynamics. The final section draws on examples from our field visits to discuss the opportunities and constraints the region faces in transitioning toward higher value-added production, and the role of human capital plays in this process.

³ This visit were not intended as a systematic field study or a data collection process with statistical representativeness; rather, they were conducted as exploratory engagements aimed at gaining a better understanding of current conditions in the earthquake-affected region, the perspectives of local stakeholders and the dynamics on the ground. Within this scope, seven stakeholder interviews were conducted with business representatives, local institutions and academics, alongside on-site observations in container settlements. The observations and assessments derived from these engagements have been used throughout the relevant sections of this report as qualitative inputs to complement the analysis.

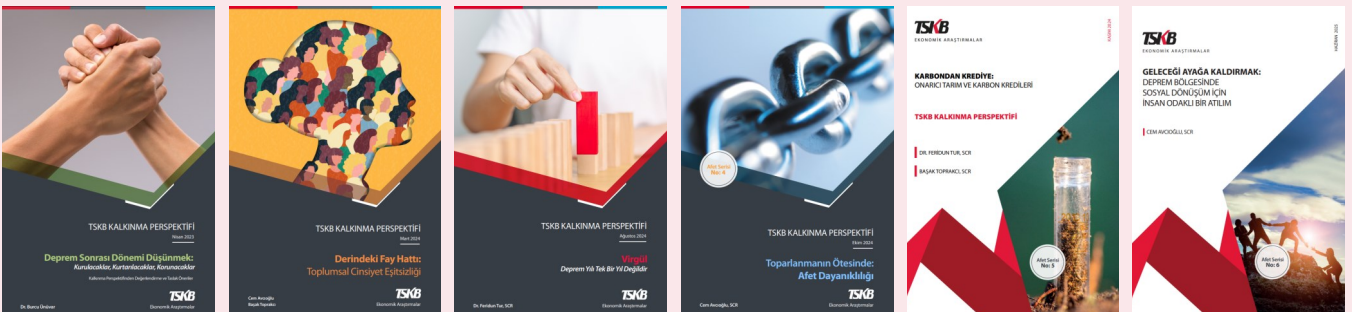
Focus: TSKB Economic Research's Body of Work on Disasters

Due to the far-reaching effects of disasters, disaster resilience is at the heart of many other development themes discussed in our work and has been incorporated into our 2024-2026 research program. In the wake of the 2023 earthquakes, it was clear that the issue should be on the agenda of all economic actors. As the need to recognize, assess and understand the risks arising from natural disasters grows, TSKB Economic Research is committed to the following during the period in question:

- To monitor the recovery process in the earthquake zone and publish annual reports,
- To consider disaster risk in macroeconomic evaluations and projections,
- Re-evaluating our development themes in terms of disaster risk,
- To contribute to constructive dialogue on the issue, involve stakeholders and raise awareness.

Building on the understanding that a disaster year is not confined to a single year, with the commitments we have made we aim to:

- keep the multidimensional planning of the reconstruction of the provinces affected by the earthquakes in 2023 within a development framework on the agenda of economic actors,
- direct the international development financing sources, which are expected to accelerate for 3 to 5 years following disasters, towards areas that will produce concrete results in line with needs and based on the right justifications,
- stress the fact that earthquakes are not the only disasters and that Türkiye's resilience should be enhanced against both geological and non-geological hazards,
- associate increasing disaster resilience not only with improving physical conditions but also with restoring the ecosystem and strengthening social integration, contribute to strengthening a constructive discussion environment regarding the disaster management process.



Conceptual Framework: Relocation and Human Capital

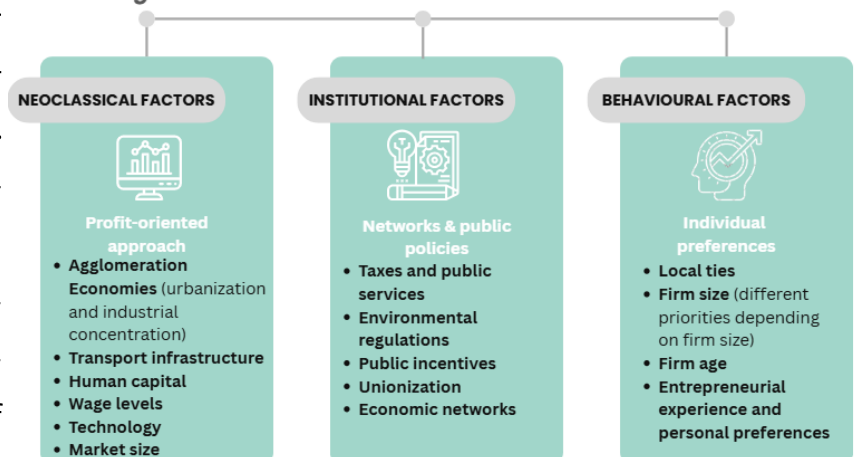
Post-disaster recovery is often assessed through the lens of physical damage repair and the resumption of economic activity. The reconstruction of housing, the restoration of infrastructure and the reactivation of production facilities are among the most visible components of this process. However, the literature indicates that post-disaster recovery is not limited to physical reconstruction; rather, it should be understood as a broader transformation process with long-term development implications (Aldrich, 2010).

The assessment of the 2023 Kahramanmaraş earthquakes conducted by the Organisation for Economic Co-operation and Development (OECD) similarly emphasizes that reconstruction cannot be reduced to the compensation of physical losses alone, but should rather be approached through a holistic framework which can manage long-term displacement, plan the labor force required for rebuilding, strengthen governance mechanisms and ensure the participation of local communities in the process (OECD, 2023). Likewise, the post-earthquake assessment report prepared by the Presidency of Strategy and Budget (SBB) defines the core objective of recovery as going beyond a return to the pre-disaster state and towards building a more inclusive, resilient, and sustainable economic structure (SBB, 2023). Taken together, these studies suggest that post-disaster reconstruction goes beyond re-establishing pre-earthquake production capacity and instead creates a space of transformation in which the region's future sectoral composition and its position within the value-added production structure are reshaped.

In this context, relocation becomes one of the key determinants shaping the direction of reconstruction. A region's ability to attract new investments or retain existing ones depends not only on the re-establishment of physical infrastructure, but also on the development of the broader production ecosystem.

In their review of empirical studies on industrial location, Arauzo-Carod et al. (2008) found that in-

Figure 1. Determinants of Investment Location Decisions



Source: Arauzo-Carod et al. (2008), TSKB Economic Research

vestment decisions are shaped by neoclassical factors such as agglomeration effects, transport infrastructure, technology and human capital quality, institutional factors including taxation and regulatory frameworks, and behavioural factors reflecting entrepreneurs' individual preferences and local ties. This finding suggests that the relocation of investments in regions where production is concentrated, or the location decisions of new investments cannot be explained through a single-dimensional cost calculation, but rather rests on a broader set of considerations in which the region's production and living conditions and institutional capacity are jointly assessed.

At the heart of this production ecosystem lies human capital. Access to skilled labor, the educational infrastructure required to develop this workforce, and cluster structures that enable inter-firm knowledge spillovers are of critical importance, particularly for investments oriented toward high value-added production. Porter's cluster approach likewise demonstrates that firms achieve productivity gains through access to specialized labor, knowledge-sharing networks, and strong supplier linkages⁴. The weakening of these elements can, in turn, limit the capacity of new investments, particularly in high value-added production, to locate in regions with relatively lower levels of socio-economic development.

A more resilient reconstruction for the earthquake-affected region rests both on attracting new investments to the region and the relocation of certain activities from densely populated centers, in turn contributing to the spatial reallocation of economic capacity. However, the permanence of this process depends on the ability to attract and retain the human capital required by these investments. At the same time, the spatial relationship between work and the workforce is no longer determined solely by the location of investments. Digital infrastructure enabling remote work, and the growing adoption of new working arrangements can create new opportunities for regions outside major cities to attract new workers, revitalize economic activity and strengthen local communities (OECD, 2021). In this context, individuals who are able to work remotely may increasingly choose regions offering more affordable living costs, housing opportunities and an improved quality of life, while firms may reassess their working models and spatial organization (OECD, 2021). Therefore, relocation should be considered not merely as the movement of capital but as the repositioning of capital, work and human capital in different forms. From this perspective, the reconstruction of the earthquake-affected region in a more resilient manner involves not only enhancing its capacity to attract investment but also creating conditions that enable skilled individuals to choose to live in the region. Quality-of-life factors, ranging from education and sports facilities to dining habits and cultural activities, are therefore becoming important components of the region's capacity to attract and

⁴<https://hbr.org/1998/11/clusters-and-the-new-economics-of-competition>

develop human capital.

Post-earthquake migration flows, disruptions in education processes, and changes in living conditions have had a direct impact on the human capital dimension of this production ecosystem. The outmigration of skilled labor, as well as delays in return migration decisions, can affect both the growth potential of existing investments and the likelihood of new investments considering the region as an alternative location. These losses can be particularly pronounced in sectors that rely on specialized labor. In this respect, when assessing post-disaster recovery, it is essential to not only take into account production indicators, but also the state of the human capital base that sustains and advances this production.

The following sections examine the economic outlook of the earthquake region over the past three years, along with migration dynamics, and assess—together with field observations—the role of the human factor in the region's reconstruction process.



Where Are We After More Than 3 Years?

More than three years have passed since the earthquake. During this period, a comprehensive reconstruction program was launched to help rebuild the region, while a wide range of support mechanisms was put in place to sustain production activity and limit economic losses. A broad set of measures, covering areas from housing construction, infrastructure investments and financial support schemes to employment incentives was deployed to rebuild the region's economic and social structure. To assess where we stand today, it is important to examine how this reconstruction process has translated into outcomes in terms of production, employment and entrepreneurial indicators.

In this context, one can first look at changes in the production structure. Data on the number of established firms points to a recovery in economic activity in the region following the earthquake. The most significant losses were observed among small enterprises with 1–9 employees, although by 2025 the number of establishments in this group had risen to above pre-earthquake levels. A similar recovery was seen among medium-sized enterprises, while the increase in the number of establishments among large-scale enterprises is notable for having occurred immediately after the earthquake (Chart 1).

A closer examination of the data reveals a notable divergence in the number of establishments with 250+ employees. While the number of workplaces in this category declined across Türkiye as a

Chart 1. Change in the Number of Workplaces in the Earthquake Region
(Total of 11 Provinces*, by Workplace Size)



Source: Social Security Institution (SSI), TSKB Economic Research

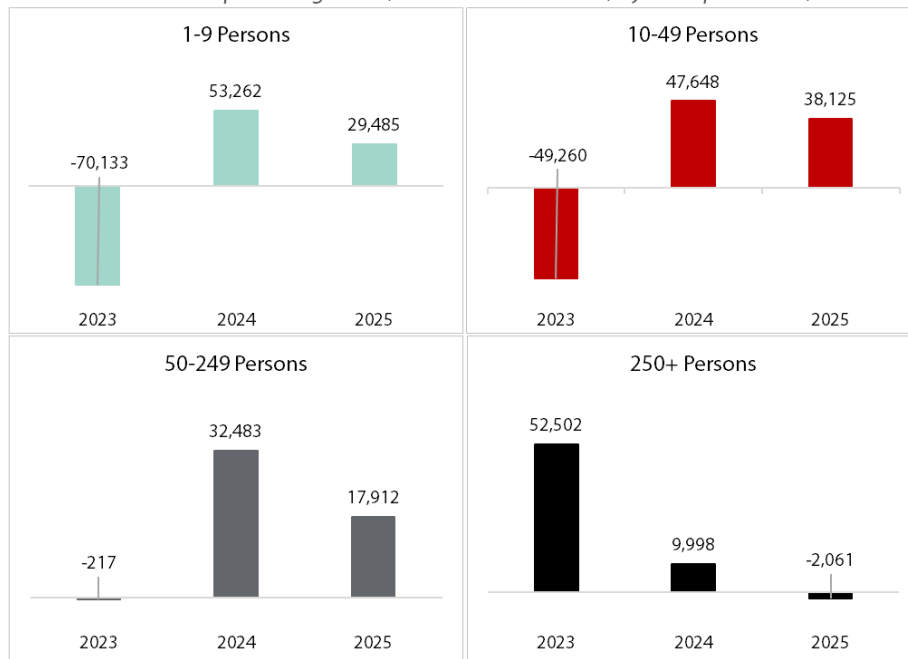
Note: Differences are calculated relative to the December data of the previous year.

*11 provinces: Adana, Adıyaman, Diyarbakır, Gaziantep, Elazığ, Hatay, Kahramanmaraş, Kilis, Malatya, Osmaniye, Şanlıurfa

whole between 2022 and 2025 (-331), the increase in the earthquake region represents a notable divergence for the region. However, this increase was not observed uniformly across all 11 provinces. The rise was largely concentrated in Hatay (+116), followed by Malatya (+34), Kahramanmaraş (+21) and Adıyaman (+16). In contrast, Adana, Diyarbakır and Şanlıurfa experienced a decline in the number of establishments with 250+ employees. This divergence suggests that investments planned prior to the earthquake may have been implemented with the support of post-earthquake incentives. Similarly, the increase in large-scale business organizations in provinces where reconstruction activities intensified and the concentration of employment within larger enterprises should also be considered as possible factors behind this outcome.

The number of compulsory insured workers also points to a similar transformation. While small and medium-sized enterprises suffered the heaviest losses in employment in the immediate wake of the earthquake, the number of insured workers in establishments with 250 employees or more had already exceeded pre-earthquake levels in the first year following the earthquake (Chart 2). As the recovery spread across all size groups in the following period, the number of insured workers surpassed pre-earthquake levels across all size categories by 2025, with the most pronounced increase compared to 2022 (approximately +60 thousand workers) observed among large-scale enterprises. This picture suggests that employment has tended to become more concentrated within larger enterprises following the earthquake. At the provincial level, however, this trend was not observed uniformly across the earthquake region. While the share of employment in enterprises with 250+ emp-

Chart 2. Change in the Number of Compulsory Insured Persons in the Earthquake Region * (Total of 11 Provinces, by Workplace Size)



Source: SSI, TSKB Economic Research

*4/a coverage

Note: Differences are calculated relative to the December data of the previous year.

loyees increased by approximately 1 percentage point across the 11 provinces between 2022 and 2025, the increase was particularly pronounced in Hatay (+14 percentage points), Adıyaman (+5.9 percentage points), Malatya (+4.9 percentage points) and Kahramanmaraş (+2.9 percentage points). Considering that the share of enterprises with 250+ employees in employment nationally declined by 0.9 percentage points across Türkiye over the same period, the increase in the earthquake region represents a divergence from the national trend. These findings suggest that, particularly in some of the provinces most severely affected by the earthquake, the reconstruction process has shifted the composition of employment in favour of larger enterprises.

Total employment figures reveal a different dimension of the recovery process. The earthquake region's share in Türkiye's total employment declined significantly following the disaster, but has since resumed an upward trajectory and, as of 2025, moved above the trend observed over the 2019–2022 period. As of the first quarter of 2026, this level appears to have been maintained. This suggests that the region appears to have compensated for its employment losses; however, as discussed in the following analyses, employment growth can also be considered to have been supported by reconstruction activities. Likewise, the slight decline observed in recent periods in Chart 3 may reflect the impact of decreasing construction activity and could indicate that the region is beginning to return towards pre-earthquake period norms.

The production side has also demonstrated a recovery pattern similar to that seen with employment. The share of the 11 provinces affected by the earthquake in Türkiye's GDP declined slightly to 9.8% in 2023, but rose to 10.4% in 2024, exceeding their share in the pre-earthquake period (Chart 4). This indicates that the region has regained its weight within the Turkish economy in terms of overall economic activity. However, a more differentiated

Chart 3. Share of Earthquake Region Provinces in Total Employment*, % (Compared with the 2019–2022 trend)

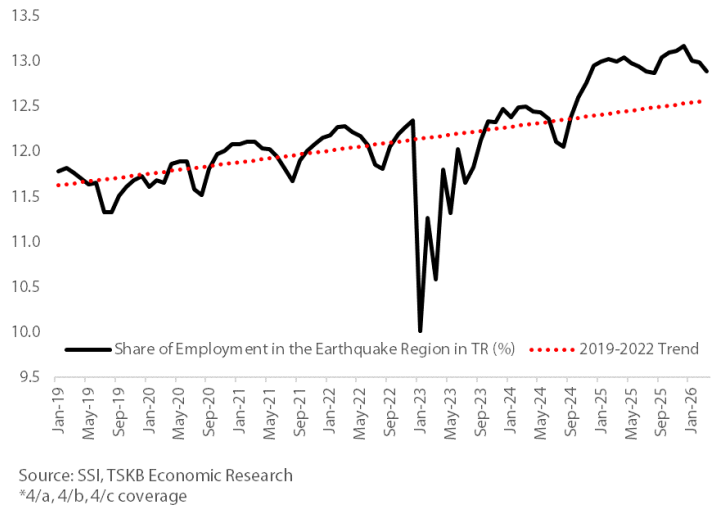
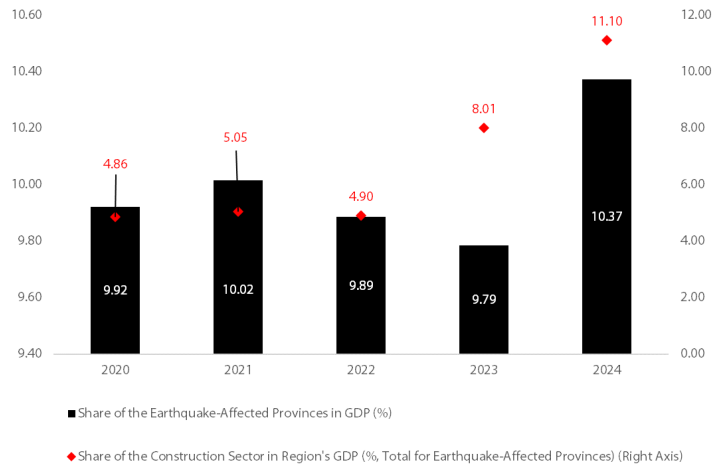


Chart 4. Share of the Earthquake Region in Türkiye's GDP and the Weight of the Construction Sector in the Earthquake-Affected Region's Economy (%)



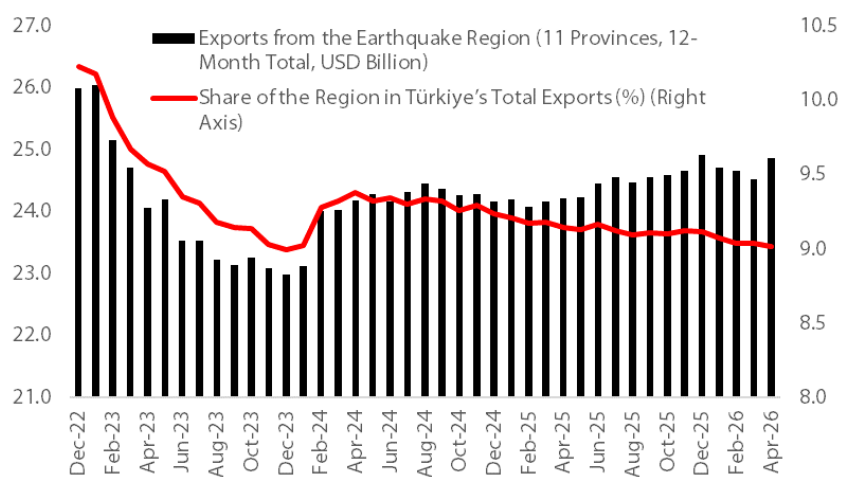
picture emerges when we look at which sectors are driving this recovery.

In the earthquake region, the share of the construction sector in GDP increased from 4.9% in 2022 to 8.0% in 2023, and further to 11.1% in 2024 (Chart 4). Over the same period, this ratio rose from 4.8% to 5.8% at a national level. In particularly heavily damaged provinces, the weight of the construction sector within the economy increased dramatically, such as in Adıyaman (from 6.0% to 22.9%), Hatay (from 3.6% to 17.6%), Kahramanmaraş (from 3.9% to 17.2%) and Malatya (from 5.8% to 16.1%). This picture shows that the recovery in the region's share of GDP is largely driven by reconstruction activity, housing construction and infrastructure investments. The increase in the construction sector's economic weight in the region does not necessarily imply that the sectoral structure has returned to its pre-disaster balance; rather, it indicates that reconstruction-related expenditures continue to play a decisive role in economic growth.

A different picture emerges when we look at industrial activity⁵. In the earthquake region, the share of the industrial sector in GDP stood at 29.5% in 2022, before declining to 22.4% in 2023 and further to 19.6% in 2024. Over the same period, the share of industry in Türkiye as a whole also decreased from 26.1% to 22.8%, and then to 19.7%. This indicates that the decline in industrial production is not specific to the earthquake region alone, although it has been felt more sharply in the region affected by the earthquake. Accordingly, it appears that the recovery in production capacity has been supported primarily by the rapid reconstruction process driven by construction activity, while a similarly strong rebound in the industrial sector has not yet materialized.

A similar pattern is also observed in foreign trade data. While the region's total exports have been on an upward trend since the beginning of 2024, the region's share in Türkiye's total exports declined in the aftermath of the earthquake and has not yet returned to its pre-earthquake level, despite the time that has elapsed (Chart 5). This suggests that while production activity has regained momentum, the re-

Chart 5. Export Trends in the Earthquake Region



Source: Turkstat, TSKB Economic Research

⁵ In this analysis, industry is defined as the aggregate of the Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), and Water supply; sewerage, waste management and remediation activities (E) sectors, in accordance with the NACE Rev.2 classification.

gion's relative weight within the national economy has not been permanently strengthened. In other words, although the recovery is progressing in absolute terms, a significant proportion of this improvement has been driven by reconstruction-related developments. Export indicators, on the other hand, highlight that a more structural recovery in the production base has not yet been completed.

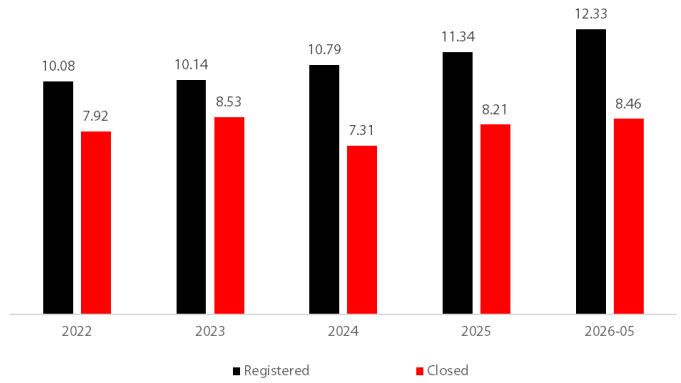
Figures on the registration of new companies and company closures present a more complex picture of economic dynamism in the region. The proportion of companies being established in the earthquake region as a share of Türkiye as a whole gradually increased after 2023, while there has been a more limited change in the share companies being closed (Chart 6).

This pattern points to a revival in entrepreneurial activity and sustained economic dynamism in the region. However, in light of current indicators, this momentum does not provide a strong signal of a lasting expansion in production capacity. Whether such an expansion materializes depends on factors such as the integration of these firms into production and supply chains, their scaling potential and their access to human capital.

Overall, the indicators suggest that the economic recovery in the earthquake region has progressed significantly: employment has entered a clear recovery trajectory following the initial losses, production activity has revived, and the region's share in Türkiye's GDP has once again risen above pre-earthquake levels. However, this recovery in GDP appears to be driven to a considerable extent by reconstruction-related activities. In contrast, export indicators suggest that the region's relative weighting in national production capacity has not yet been fully restored. **Therefore, it is necessary to distinguish between the short-term economic dynamism generated by reconstruction activities and the region's ability to regain lasting strength as a center for investment, production and living.** This is because construction-driven growth alone does not lead to the restoration of the region's long-term attractiveness.

In this context, population movements also play an important role in understanding the current state of recovery in the region. In particular, the direction and underlying reasons for post-earthquake migration flows provide a critical indicator for understanding how the region's attractiveness is being reshaped under new conditions.

Chart 6. Company Registrations and Closures in the Earthquake Region (11 Provinces as a Share of Türkiye's Total, %)



Source: TOBB, TSKB Economic Research

Changing Dynamics of Post-Earthquake Migration

In the post-disaster recovery processes, population movements are one of the key indicators reflecting individuals' decisions regarding where to live, work and build their future. In this respect, migration dynamics play a critical role not only in understanding the economic recovery in the region but also the social aspect. In particular, the conditions driving return migration decisions after large-scale disasters is decisive in understanding how regional attractiveness is rebuilt.

The February 2023 earthquakes led to one of the largest population movements in Türkiye's recent history. Approximately 14 million people were living in the 11 provinces affected by the earthquakes, and it is estimated^{6,7} that at least 2.7 million people were displaced in the immediate aftermath of the disaster, with around 1.1 million of them migrating to provinces outside the earthquake region. In this context, changes in the direction and underlying reasons for post-earthquake migration flows provide an important indicator in assessing the social and economic dimensions of the recovery process in an integrated manner.

While Turkstat's migration reason classification does not include disaster-related relocation as a separate category, relocations due to disasters are tracked under the "other" category, together with moves related to employer-provided housing, urban transformation/expropriation, insufficient income levels, and moves for more affordable housing and living conditions. In 2023, migration under the "other" category among the population leaving the earthquake region increased markedly compared to the previous year (Table 1). Given the timing of this increase, it can be inferred that this ca-

Table 1. Reasons for Out-Migration from the Earthquake-Affected Provinces (Share in Total, %)

Reasons (Total of 11 Provinces)	2022	2023	2024	2025
Returning to their family or hometown	1.1	0.7	5.3	3.6
Unknown	5.6	1.3	4.0	4.6
Better Housing and Living Conditions	16.0	1.4	18.5	19.8
Other	2.3	66.7	2.0	1.6
Education	23.1	11.7	21.1	18.1
Retirement	0.2	0.4	0.3	0.3
Buying a home	2.1	0.7	2.2	1.6
Migration for a member of the Household or Family	23.1	4.2	22.8	24.6
Starting a job or finding employment	8.7	4.7	7.4	8.6
Change in Marital Status or Family Reasons	6.2	2.3	5.6	5.5
Health or Care needs	0.4	0.3	0.4	0.4
Job Transfer or Change of job	11.2	5.5	10.4	11.4

Source: Turkstat, TSKB Economic Research

Note: The leading reasons are highlighted in green.

⁶ <https://reliefweb.int/report/turkiye/iom-2023-earthquakes-displacement-overview-turkiye-march-2023>

⁷ Including refugees residing in the earthquake region.

tegory largely reflects forced displacement caused by the earthquake. This pattern suggests that, in the initial phase of the disaster (the acute phase), migration decisions were shaped less by usual preferences and more by immediate needs related to safety and shelter.

Provincial-level net migration figures indicate that post-earthquake population movements did not follow a homogeneous pattern across the region. According to 2023 data, Hatay (127,179), Malatya (68,207), Kahramanmaraş (50,537) and Adıyaman (25,078) stand out as the provinces with the highest net out-migration following the earthquake⁸. This data suggests that the post-disaster demographic contraction was felt much more severely in certain provinces with wide variations in the recovery within the region. A closer look at migration flows also reveals clear clustering patterns. Studies conducted in the immediate aftermath of the earthquake have found that a significant share of the population leaving the earthquake region moved toward major urban centers such as Ankara, Antalya, Mersin, Muğla and Kayseri (Sağiroğlu et al., 2023). This indicates that post-disaster mobility was shaped not only by safety concerns, but also by factors such as existing social networks, geographical proximity, and access to housing.

However, by 2024, a notable shift emerged in the underlying reasons for migration. While the weight of the “other” category declined, reasons related to family reunification, better housing and living conditions, and education regained their prominence (Table 1). This trend continued in 2025. This change suggests that the extraordinary mobility of the first year following the disaster gradually evolved into more selective and routine decision-making processes over time.

Table 2. Reasons for In-Migration to Earthquake-Affected Provinces (Share in Total, %)

Reasons (Total of 11 Provinces)	2022	2023	2024	2025
Returning to their family or hometown	1.8	1.9	20.1	13.1
Unknown	8.6	5.3	6.6	6.8
Better Housing and Living Conditions	18.1	11.5	15.0	17.9
Other	2.1	29.3	1.7	1.2
Education	16.2	10.9	15.8	13.9
Retirement	0.2	0.7	0.3	0.3
Buying a home	2.8	2.1	2.1	1.7
Migration for a member of the Household or Family	26.2	16.5	19.1	23.4
Starting a job or finding employment	6.4	7.2	5.5	6.0
Change in Marital Status or Family Reasons	5.7	3.8	4.1	4.4
Health or Care needs	0.4	0.3	0.4	0.3
Job Transfer or Change of job	11.4	10.3	9.5	11.0

Source: Turkstat, TSKB Economic Research

Note: The leading reasons are highlighted in green.

⁸Turkstat Interprovincial Migration Data; TSKB Economic Research Analysis. Looking at the migration data of these provinces for 2022, it can be seen that they also recorded net out-migration in that year; however, following the earthquake, the magnitude of net out-migration increased by an average of 19.8 times across the four provinces.

A similar transformation has also been observed in migration flows towards the earthquake region. The prominence of the “other” category among the reasons for migration in 2023 clearly reflected the impact of short-term and temporary relocations following the disaster. In contrast, in 2024, the marked increase in migration for the reasons of “returning to their family or hometown” (Table 2) indicates a strengthening return trend among populations that have maintained their ties with the region. In 2025, although migration for the reason of returning to family or hometown declined both in terms of its level and its share in total migration, it continued to remain one of the important reasons for migration towards the region. The increasing prominence of reasons such as “migration for a member of the household or family” and “better housing and living conditions” during the same period suggests that the impact of the initial return wave following the earthquake has started to weaken, while migration towards the region is increasingly being shaped by reasons reflecting more routine settlement decisions.

Overall, the analysis suggests that, for both populations leaving the region and those moving toward it, migration decisions are not explained solely by employment-related factors such as finding a job, starting work, or job transfers. Family ties, housing conditions, educational opportunities, and quality-of-life considerations emerge as much stronger determinants in individuals’ decisions. This highlights the need to consider the social and lived dimensions of post-disaster recovery together with economic reconstruction.

The age composition of migration flows also provides insight into the nature of mobility. Although Turkstat’s dataset on migration reasons by age group is not available at the provincial level and

Table 3. Reasons for Interprovincial Migration by Age Group (2023, Share within Each Age Group, %)

Reasons	Aged under 15	15-29	30-49	50-64	65+
Returning to their family or hometown	2.6	1.4	3.1	7.1	6.7
Unknown	1.4	8.6	4.7	2.5	2.7
Better Housing and Living Conditions	11.1	8.6	17.6	28.3	42.7
Other	29.1	11.1	19.9	20.7	20.8
Education	0.8	32.4	0.7	0.0	0.0
Retirement	0.0	0.0	2.6	7.4	1.1
Buying a home	3.0	0.9	3.7	6.6	6.2
Migration for a member of the Household or Family	51.6	8.6	13.6	16.6	13.2
Starting a job or finding employment	0.0	12.5	9.5	3.2	0.1
Change in Marital Status or Family Reasons	0.0	6.3	5.3	2.1	1.4
Health or Care needs	0.2	0.1	0.4	1.1	4.9
Job Transfer or Change of job	0.0	9.4	19.0	4.4	0.1

Source: Turkstat, TSKB Economic Research

Note: The leading reason in each age group is highlighted in green.

instead reflects a nationwide picture, it nevertheless offers an important framework for understanding how migration decisions vary across the life course. The 2023 figures show that family-related migration dominates among those under 15, with education-related reasons prominent in the 15–29 age group, the “other” category standing out among those aged 30–49, and better housing and living conditions being the most significant reason among those aged 50 and over (Table 3). The 2025 data indicate that the internal distribution within age groups (i.e., the leading reasons within each group) has remained largely unchanged. However, it is noteworthy that the importance of “better housing and living conditions” has increased across all age groups and has become one of the key determinants, particularly among groups aged 30 and over (Table 4).

These findings suggest that post-disaster return and settlement decisions are shaped by different sets of needs across age cohorts. **In particular, education opportunities, social life, and future expectations are decisive factors for younger populations, while stable income and adequate housing conditions are more critical for the working-age population in reshaping regional attractiveness. This, in turn, underlines the need for post-disaster recovery policies to be supported by more targeted instruments that take demographic differentiation into account.**

Table 4. Reasons for Interprovincial Migration by Age Group (2025, Share within Each Age Group, %)

Reasons	Aged	15-29	30-49	50-64	65+
Returning to their family or hometown	4.6	2.0	3.8	6.4	6.8
Unknown	2.2	10.1	3.7	3.9	4.0
Better Housing and Living Conditions	17.6	11.6	26.7	39.5	55.4
Other	3.4	0.8	1.8	2.9	2.5
Education	0.6	35.1	0.9	0.0	0.0
Retirement	0.0	0.0	0.5	3.5	1.3
Buying a home	2.4	0.7	3.2	7.2	6.8
Migration for a member of the Household or Family	68.9	10.3	17.8	19.4	14.6
Starting a job or finding employment	0.0	12.9	9.8	5.8	0.3
Change in Marital Status or Family Reasons	0.0	7.3	6.8	2.8	1.6
Health or Care needs	0.3	0.1	0.3	1.2	6.6
Job Transfer or Change of job	0.0	9.1	24.6	7.3	0.1

Source: Turkstat, TSKB Economic Research

Note: The leading reason in each age group is highlighted in green.

This picture also has important implications on investment decisions. The availability of the human capital required by firms in the region depends not only on employment opportunities but also on whether people choose to live there, or whether the conditions exist to make such a choice viable. This in turn suggests that the physical reconstruction is not entirely independent from the quality of social recovery.

The discussions held during our field visits also strongly support the picture suggested by the data. In meetings with public institutions, private sector representatives and academics, we found that concerns regarding whether skilled labor would remain in the region played a central role in strategic decisions about the future. The following section examines these field findings.



What Do the Field Findings Tell Us?

The analysis presented in the previous sections reflects the significant progress made in the recovery process in the earthquake region. Production activity is picking up, employment losses are being offset, and the number of enterprises is increasing. However, export performance and migration dynamics suggest that this recovery has not necessarily translated into a commensurate restoration of the region's attractiveness. The field visits provide further insight into the dynamics behind this divergence, as well as the opportunities and constraints shaping the region's transformation.

The interviews show that the pace of recovery differs across provinces. While progress has been realized in physical reconstruction, there is still a considerable way to go before daily life can be restored to its pre-earthquake conditions. From this perspective, the region continues to experience a more complex and longer-term recovery process in terms of living conditions, social ties and human capital. At the same time, field observations also suggest that the region has notable capacity to support this transformation. The willingness of enterprises to continue investing, initiatives targeting new production areas and collaboration among local stakeholders provide encouraging examples of building back better. However, it is still too early to conclude that these examples have generated broader momentum for structural transformation across the region. It is therefore critical that the positive practices observed in the field do not remain isolated examples, but are scaled up and extended across the region, thereby creating a leverage effect for a lasting recovery. To the extent that this can be achieved, the recovery process may go beyond restoring existing capacity and become an opportunity to transition towards a higher value-added economic structure.

The three themes discussed below demonstrate that post-disaster recovery is not only about compensating for losses and restoring existing capacity. They also show that, by strengthening social ties, transforming the production ecosystem and developing human capital, the region has the potential to move towards a stronger development path.



The Social Foundations of Recovery

One of the most prominent themes emerging from the field findings was the transformation of social relations and everyday life practices following the earthquake. In particular, forced displacement after the disaster has led to significant disruptions in family structures, everyday networks of solidarity, and intra-urban social relations. The interviews indicate that these disruptions have affected not only individuals' social lives but also decisions to return and tendencies towards remaining in the region.

A key point of distinction emerges here between the physical reconstruction of housing and the re-establishment of everyday life. With many new residential areas located away from city centers and existing social networks, return decisions can become more difficult. This suggests that recovery should be assessed not merely through housing supply, but also through the reorganization of daily life and the re-establishment of social ties. Likewise, beyond housing, the need for the rehabilitation or reconstruction of infrastructure presents more pronounced uncertainties regarding quality of life in some provinces, which may in turn constrain the formation of social capital that would otherwise support economic recovery.

These findings are consistent with the patterns observed in migration data. Mobility initially shaped by safety and shelter needs has gradually shifted towards more structural factors such as education, family ties and living conditions, underscoring that regional attractiveness not only has an economic dimension but also a strong social one. Therefore, despite the significant progress achieved in physical reconstruction, the process of rebuilding daily life and strengthening social ties in the region is not yet complete. **The durability of the recovery will depend not only on people's access to safe housing, but also on their ability to live in communities where they feel a sense of belonging, maintain their social relationships and build their future.** In this context, the rebuilding of social capital emerges as one of the key factors in ensuring that the economic and social dimensions of post-disaster recovery reinforce one another.



New Production Ecosystems and Transformation Capacity

A second theme which stood out during the field visits, at least in some provinces, was that reconstruction is increasingly seen not only as a means of compensating lost production capacity, but also as an opportunity to transition toward higher value-added sectors. This trend is particularly apparent in Kahramanmaraş. Driven by competitive pressures in the textile industry and rising costs, diversification efforts that had already begun prior to the earthquake are being more comprehensively redefined around new sectors in the post-disaster period. The defense and aerospace industries in the region have emerged as one of the most notable examples of this transformation.

In this process, the establishment of Kahramanmaraş Space and Aviation Inc.⁹, through a partnership between the Kahramanmaraş Chamber of Commerce and Industry and Turkish Aerospace Industries (TUSAŞ), not only sends a strong signal of the region's attractiveness to external capital but also shows that local institutional capacity has begun to be mobilized. The design of a dedicated production zone around the area allocated for TUSAŞ's planned investment in the city, with the potential to enable clustering of new firms operating in the aerospace and aviation sector, suggests that this initiative goes beyond a single investment and aims to create a broader production ecosystem.

Another notable aspect of this example is its link with the city's existing industrial base. In particular, the overlap between technical capabilities already presents itself in the metal kitchenware sector—in areas such as die-making and CNC (Computer Numerical Control) operation—and the skill requirements of the aerospace industry offer an important opportunity for inter-sectoral knowledge spillovers. These intersections indicate that new investments may also have the potential to transform the technological capabilities of the existing industrial base.

However, according to insights gained from the interviews in the field, attracting and retaining qualified engineers and technical personnel in the region remains a key challenge. In this context, the Aviation Vocational High School¹⁰ established within Kahramanmaraş İstiklal University through a collaboration between Airbus and TUSAŞ provides a notable example. This initiative represents a longer-term approach that moves away from sourcing human capital from the market after investments are carried out, and instead focuses on developing the skills required by the investment locally.

From this perspective, the Kahramanmaraş case illustrates that in the post-disaster recovery, regional attractiveness can be cultivated through the simultaneous deployment of institutional coordination, sectoral transformation and the targeted investment in skilled labor.

⁹<https://www.aa.com.tr/tr/bilim-teknoloji/kahramanmarasta-kurulan-savunma-sanayi-sirketine-ortaklik-icin-168-basvuru-yapildi/3211049>

¹⁰<https://www.istiklal.edu.tr/tusasmyo>

Building Human Capital on Site

A third theme emerging from the field visits was that skilled labor constraints are not treated by some firms as a passive barrier, but rather as a capacity problem that must be actively managed.

In particular, firms operating in high-technology and highly regulated sectors tend to respond to limited access to externally sourced talent by developing this capacity internally. This points to a shift in the way human capital is conceptualized—from an input readily obtained from the market to a strategic production capacity that is built over time.

Key elements of this model include the long-term retention of core staff, the transmission of knowledge through organizational memory, in-house academies and extended training mechanisms. In some cases, external expertise and international consultancy support have also been found to complement this process. This structure enables knowledge to move beyond the level of individual skills, become institutionalized and turn into a permanent component of production capacity.

The proactive approach we observed is also reflected in the broader human capital literature. Knowledge, skills and experience are among the forms of human capital that, like physical capital, can be invested in and can enhance productivity. Becker (1994) demonstrates that human capital accumulation is not limited to formal education; it continues throughout working life through on-the-job training, experience, and other forms of “postschool investments.” From this perspective, in-house training activities are not merely tools to address short-term labor needs, but strategic investments that strengthen a firm’s long-term production capacity. Becker’s distinction between general and specific training further clarifies the logic of this investment. While general training develops skills that can be used across different employers, firm-specific training creates a reciprocal investment relationship between the employee and the employer. This, in turn, emerges as one of the key factors encouraging skilled workers to remain within the firm.

These firm-level approaches are also fully aligned with the World Bank’s global finding that human capital is not developed solely within formal education settings, but that approximately half of it is acquired directly in the workplace (World Bank, 2026). Through learning-by-doing processes enabled by expert interaction and direct exposure to advanced technologies, as observed in the examples encountered during our field visits, the workplace evolves from being merely a static production environment into a genuine “engine of learning”. The World Bank uses this concept to emphasize that the workplace should not be viewed merely as the final stage where existing capabilities are utilized, but rather as a dynamic environment where new skills are developed, and workers conti-

nuously enhance their capabilities. This model helps mitigate the risk of low learning potential, particularly in developing regions where workers may become trapped in jobs that offer limited opportunities for developing their skills, by creating an environment in which technology and skills reinforce one another.

The most critical lesson from this example for the reconstruction and better rebuilding of the earthquake-affected region is that relocation should not be viewed solely as a transfer of physical capital, but rather as a strategy for building local capacity. The shortage of skilled labor, which represents one of the main concerns regarding high-technology investments in the region, may become less of a constraint through institutional structures and academic models that enable firms to develop their own human capital locally. When investments in the region are successful, they can gradually initiate a “virtuous cycle” in which high-quality jobs generate demand for higher skills, and higher skills in turn stimulate the creation of better jobs. The World Bank defines this cycle as a process where new firms are established and expand, demand for skilled labor increases, wages rise and investment in education grows, with these gains, in turn, encouraging individuals to invest in their own development, raising the human capital levels of future generations. Through this cycle, human capital may become more embedded in the region, allowing the local economy to evolve into a continuously developing and self-reinforcing structure during the post-disaster recovery process.

Taken together, these three themes suggest that the success of the post-disaster recovery depends not only on rebuilding physical capital, but also on restoring the social ties, living conditions and human capital needed to sustain it. Field observations suggest that social and human capacity may not always be a prerequisite for strategic investments, but can, in some cases, develop alongside the investment process. While strategic investments help build the human resources and institutional partnerships they require, they also have the potential to trigger a broader transformation that strengthens both living conditions and the production ecosystem. From this perspective, the region’s development path in the coming period will depend not only on how effectively its social and economic capacity can be strengthened, but also on how widely such examples can be scaled up.



Closing Remarks

The devastating earthquakes which were centred in Kahramanmaraş on 6 February 2023 and in Hatay on 20 February 2023 were recorded as one of the largest disasters in Türkiye's history in terms of the geographical area affected, the loss of life, the scale of destruction and their economic consequences. Affecting more than 14 million people across an area of approximately 120,000 square kilometres, the earthquakes resulted in tens of thousands of deaths and injuries, the severe damage or collapse of caused hundreds of thousands of buildings, and an enormous economic cost on the Turkish economy (SBB, 2026).

In the more than three years since the February 2023 earthquakes, the reconstruction process in the earthquake region has made significant progress. The construction of housing has accelerated, infrastructure investments have been rolled out, industrial facilities have resumed operations, and important steps have been taken to preserve production capacity through various economic support mechanisms.

At the same time, the findings of this report highlight that recovery cannot be measured solely through physical reconstruction. While production and employment indicators show that the economy has recovered with the support of reconstruction activities, export data suggest that the region's relative weight within Türkiye's economy has not yet been fully restored. Migration data, on the other hand, shows that post-earthquake population movements are shaped not only by economic factors, but also by more structural considerations such as family ties, living conditions, and education.

Assessing the post-disaster recovery therefore requires a focus not only on the extent to which pre-disaster production capacity has been regained, but also on the region's potential to transition toward a higher value-added production structure. This perspective requires viewing both the redirection of investments to the region (relocation) and the sustainability of existing investments as key components of reconstruction. From this perspective, **the new threshold for post-disaster recovery should be defined as the ability to rebuild and enhance the human capital, social ties and living conditions required to transform reconstructed physical capital into lasting economic value.**

The field findings also support this framework. The interviews indicate that investment decisions in the region are shaped not only by financing and incentive mechanisms, but also by access to skilled labor, quality of life, educational infrastructure and the surrounding social environment. While the erosion of social ties in some areas renders return migration more difficult, the prolonged uncertainty associated with ongoing reconstruction in other areas puts pressure on both economic and social stability.

In contrast, initiatives aimed at building new production ecosystems and developing human capital locally provide important signals that these challenges can be overcome, and that the region can build the capacity required to transition toward a higher value-added production structure.

In light of these findings, three key policy areas stand out in relation to lasting post-disaster recovery.

First, reconstruction policies need to go beyond physical infrastructure and place greater emphasis on the broader “social infrastructure.” Alongside housing production, public infrastructure that supports education, healthcare, social services, cultural facilities and everyday life becomes a determining factor in return migration and settlement decisions.

Second, regional development policies should address the strengthening of human capital in the region in a more strategic manner. Vocational education, firm-based learning mechanisms, collaborations between industry and academia and models that support institutional knowledge transfer are critical for sustaining production capacity in the post-disaster period.

Third, the regional ecosystem-building capacity of for new investments should be more explicitly taken into account. Moving beyond individual investment decisions, a stronger focus on their effects on supply chains, supplier networks, knowledge spillovers and local skill upgrading could enhance the region’s long-term competitiveness.

Post-disaster recovery offers more than a replacement of what has been lost; it represents a strategic choice regarding the kind of economic and social structure in which the region will be rebuilt in the future. The success of these choices will largely depend on the extent to which physical reconstruction can be pursued in parallel with the rebuilding of social and human capacity. In addition, developing the conditions that will enable new investments to be directed toward the region and allow these investments to create lasting production ecosystems will be a key element in the region’s transition toward a higher value-added production structure. It is vital in this process that investments are not limited to restoring existing capacity but that they also support a new economic transformation through supply relationships, accumulated knowledge and human capital.

Throughout our disaster series at TSKB Economic Research, we have consistently emphasized a central point – that is, the impacts of disasters are not limited to the moment of destruction, and that the quality of the recovery continues to shape the direction of development for many years. For this reason, the post-disaster period should not be considered merely as a reconstruction process aimed at compensating for losses, but rather as a development period in which the region’s future production structure, quality of life and human capital capacity are reshaped. Post-disaster development policies therefore need to focus not only on today’s needs, but also on the future capacity for production and living.

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