

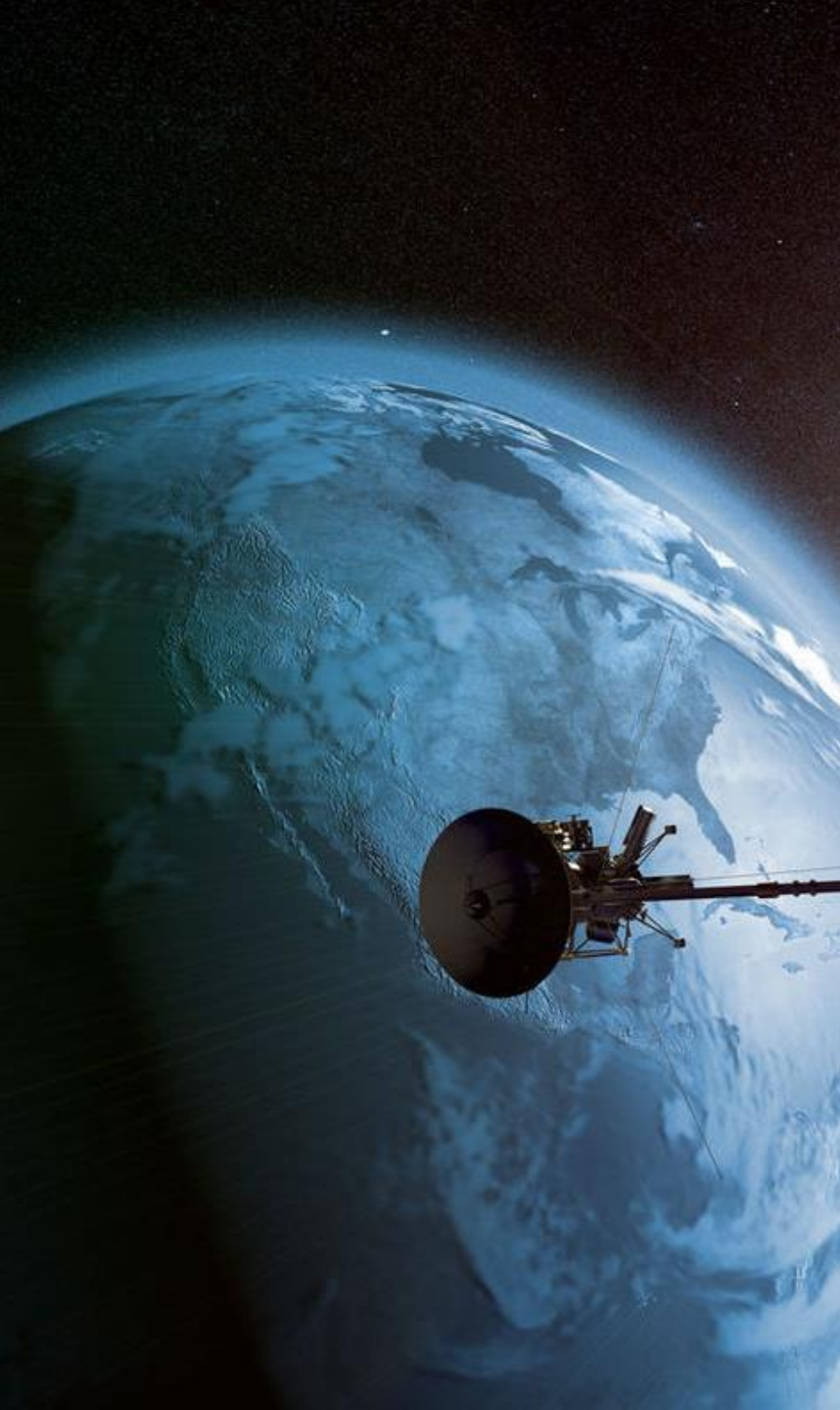


# Creating People Advantage 2023

Country Deck Turkey

NOVEMBER 2023

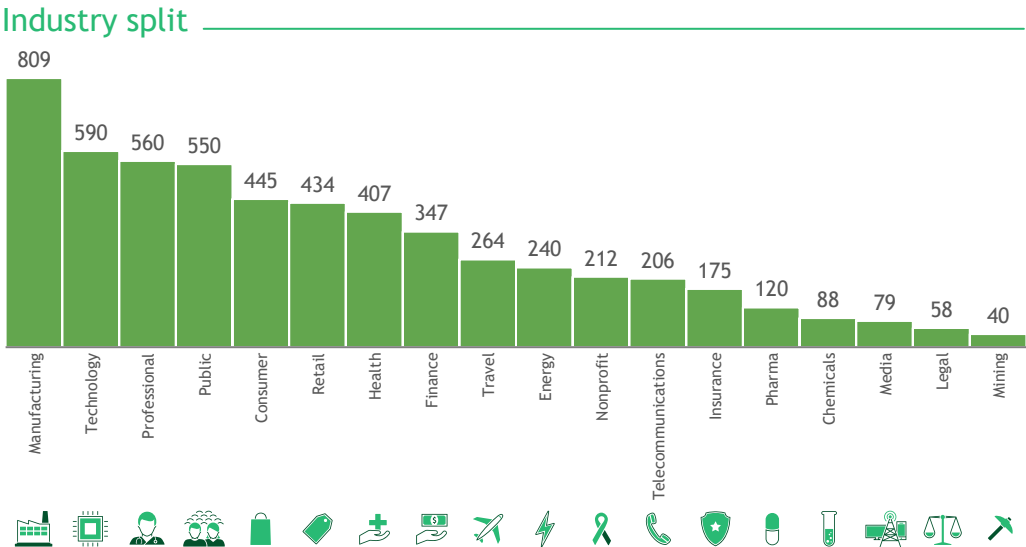
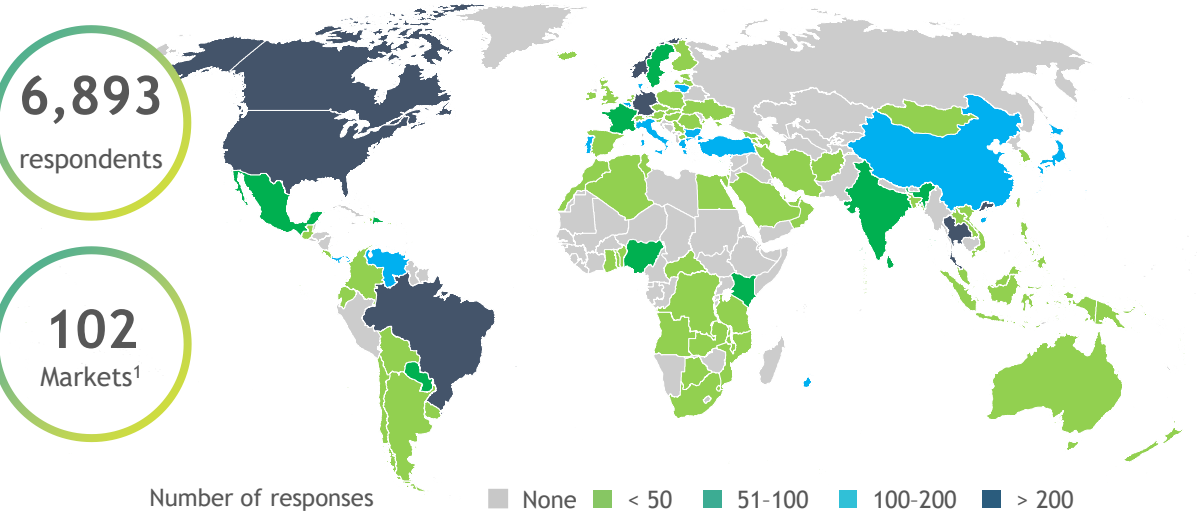




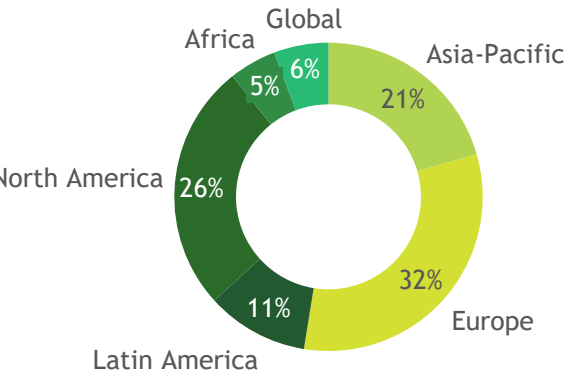
## > Global overview of results

### Turkey country results

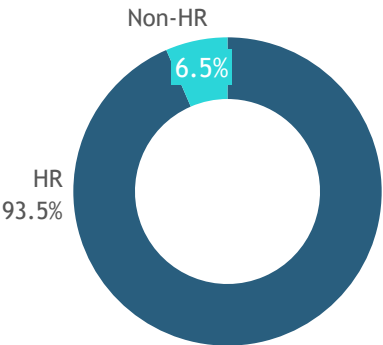
# Our survey drew responses from almost 6,900 participants in 102 markets across various industries and seniority levels



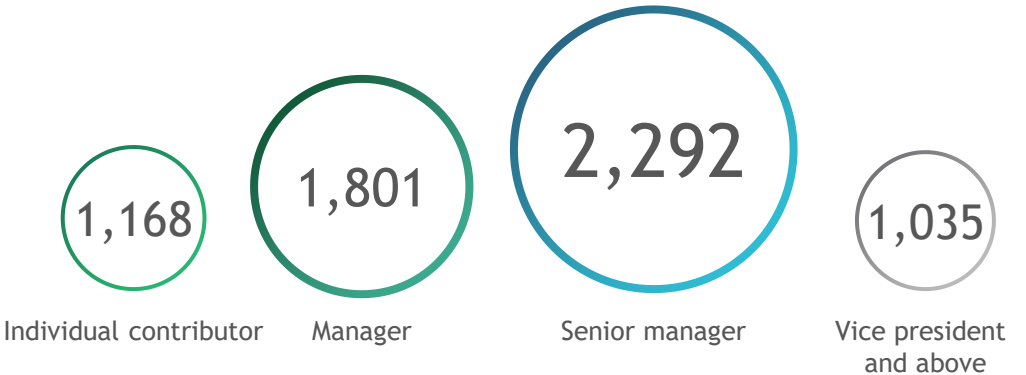
## Regional split



## Current position



## Level of seniority



Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,893).  
Note: "Other" and "N/A" responses are not included in this overview. Because of rounding, not all sector percentages add up to 100%.  
1. Responses from 100 countries and 102 markets - Taiwan, Hong Kong and Mainland China are grouped as The People's Republic of China.



# 32 HR and People Management topics were assessed along nine clusters on current internal capabilities and future importance

## Clusters

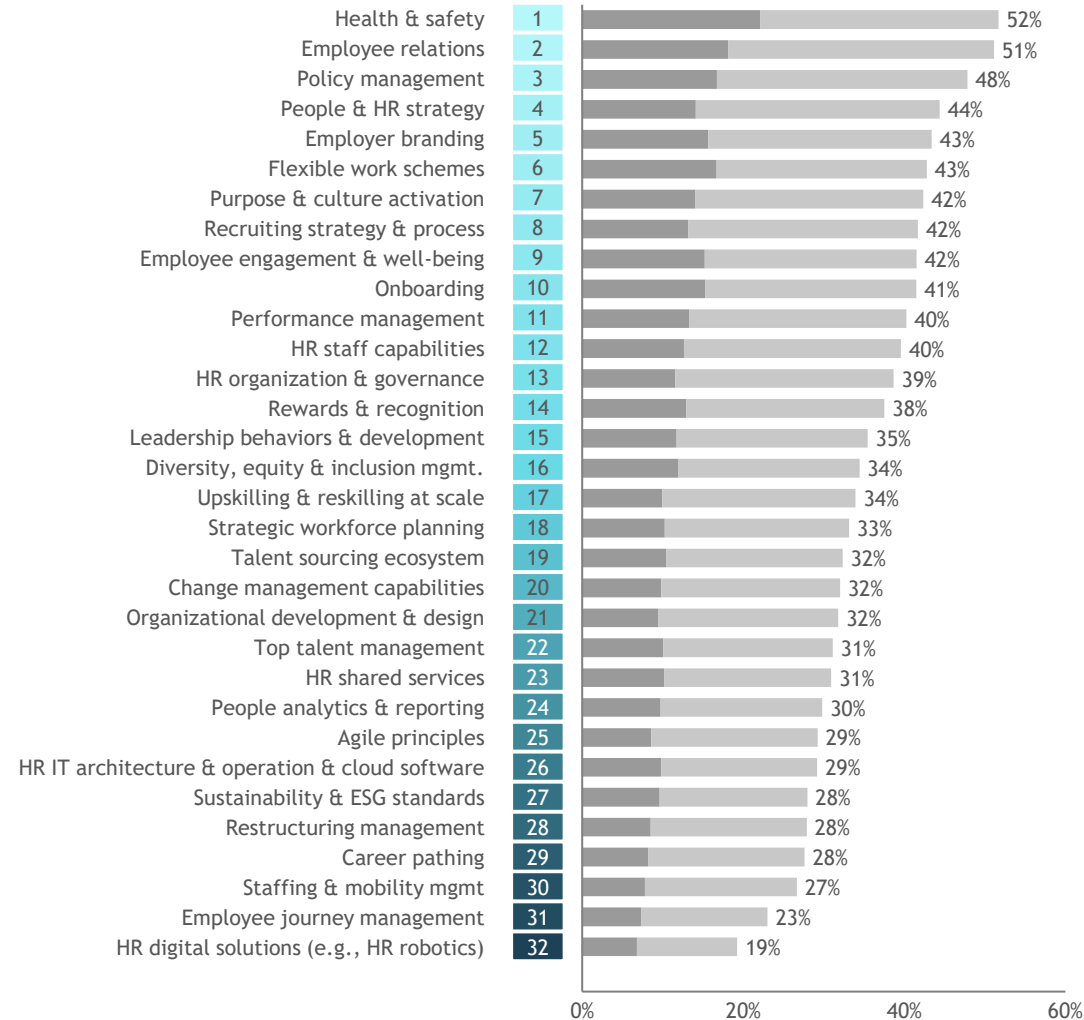
## HR and People Management Topics

|  |  |                                       |   |  |                                    |                                  |
|--|--|---------------------------------------|---|--|------------------------------------|----------------------------------|
| People and HR Strategy, Planning and Analytics   | People and HR Strategy                           |                                       | Strategic Workforce Planning (incl. job architecture and skills taxonomy) |  | People Analytics and Reporting     |                                  |
| Talent Acquisition                               | Employer Branding                                | Talent Sourcing Ecosystem             |   | Recruiting Strategy and Process              |                                    | Onboarding                       |
| People Development                               | Upskilling and Reskilling at Scale               | Career Pathing                        |   | Top Talent Management                        |                                    | Staffing and Mobility Management |
| Performance, Rewards and Engagement              | Performance Management                           |                                       | Rewards And Recognition   |  | Employee Engagement And Well-being |                                  |
| Purpose, Behavior, Leadership and Culture Change | Purpose and Culture Activation                   | Change Management Capabilities        | Leadership Behaviors and Development                                      | Diversity, Equality and Inclusion Management |                                    | Sustainability and ESG Standards |
| Labor and Employee Relations                     | Policy Management                                |                                       | Employee Relations  |  | Health and Safety                  |                                  |
| Organizational Transformation                    | Agile Principles                                 | Organizational Development and Design | Flexible Work Schemes   | Restructuring Management                     | Employee Journey Management        |                                  |
| HR Tech Stack                                    | HR IT Architecture, Operation and Cloud Software |                                       |   | HR Digital Solutions (e.g., HR Robotics)     |                                    |                                  |
| HR Operating Model                               | HR Organization and Governance                   |                                       | HR Shared Services  |  | HR Staff Capabilities              |                                  |

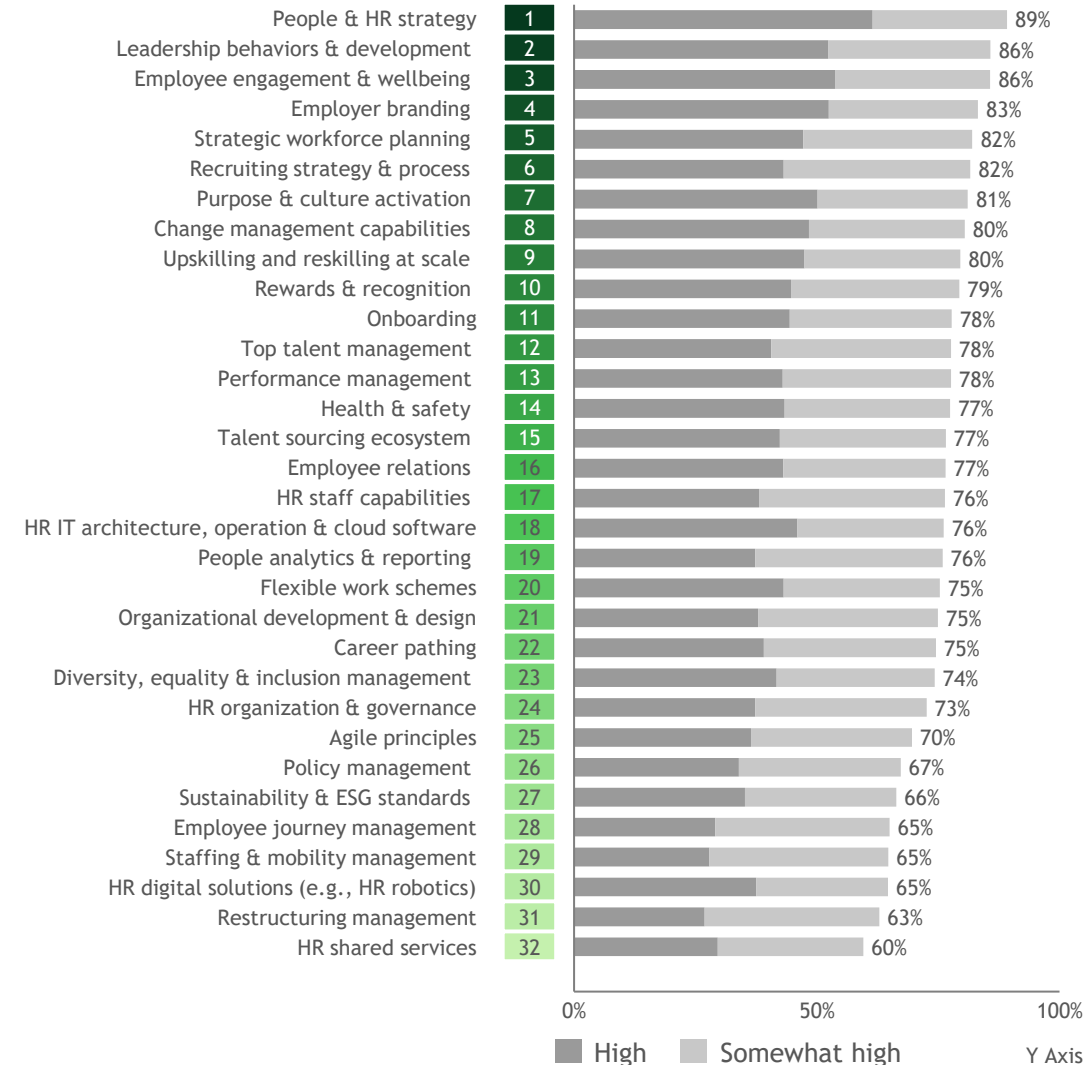


# Ranking of 32 topics for Current Capabilities and Future Importance

## Ranking Current Capabilities



## Ranking Future Importance

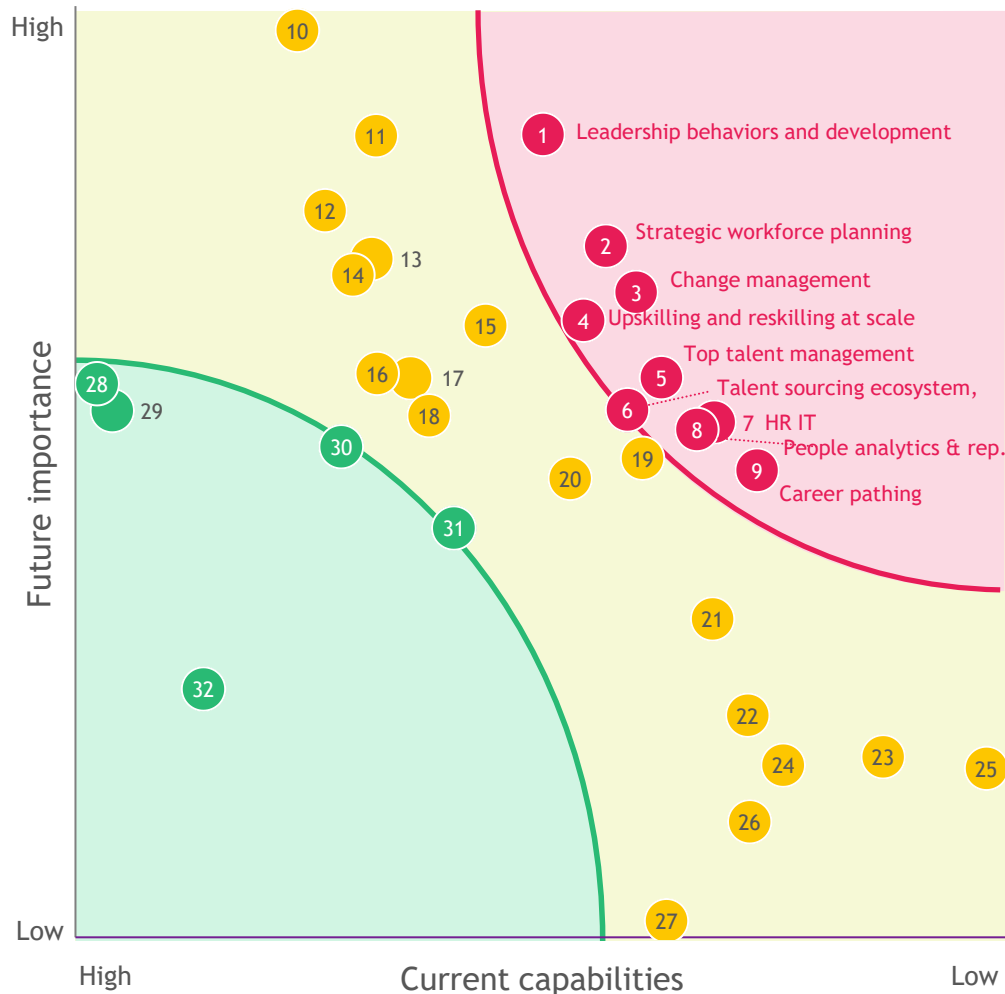


Advanced AI HR solutions have not been ranked in 2023.

Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).



# Segmenting HR topics by Current Capabilities and Future Importance identifies People Management priorities



## Strong need to act

- 1 Leadership behaviors and development
- 2 Strategic workforce planning
- 3 Change management capabilities
- 4 Upskilling & reskilling at scale
- 5 Top talent management
- 6 Talent sourcing ecosystem
- 7 HR IT architecture, operation & cloud software
- 8 People analytics & reporting
- 9 Career pathing

## Medium need to act

- 10 People & HR strategy
- 11 Employee engagement & wellbeing
- 12 Employer branding
- 13 Recruiting strategy & process
- 14 Purpose & culture activation
- 15 Rewards & recognition
- 16 Onboarding
- 17 Performance management
- 18 HR staff capabilities
- 19 Organizational development and design
- 20 Diversity, equality & inclusion mgmt.
- 21 Agile principles
- 22 Sustainability & ESG standards
- 23 Employee journey management
- 24 Staffing & mobility management
- 25 HR digital solutions (e.g., HR robotics)
- 26 Restructuring management
- 27 HR Shared services

## Low need to act

- 28 Health & safety
- 29 Employee relations
- 30 Flexible work schemes
- 31 HR organization & governance
- 32 Policy management

Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).  
Note: Based on answers "high" and "somewhat high"





Global overview of results

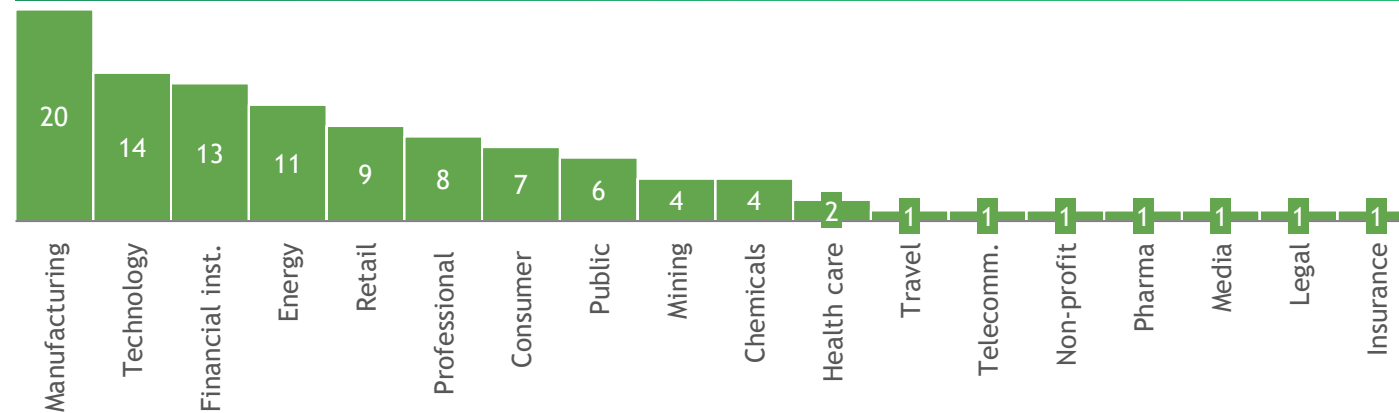
➤ Turkey country results

# Our survey drew 147 responses from Turkey

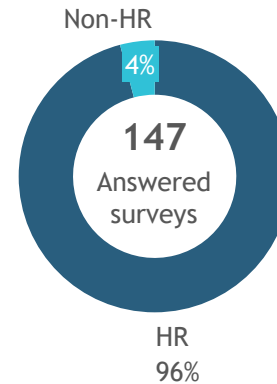
## Geography



## Industry split



## Respondent position



## Level of Seniority

Individual contributor

16

Manager

50

Vice President and above

34






Senior manager

28

Source: 2023 BCG/WFPMA proprietary web survey and analysis (Global n = 6,893, all Turkey total n = 147).  
Not Included: N/A and other answers (Industry split: 40 respondents in other industries)








Current Capabilities: Ranking of nine clusters across economies

|  |  |  |       |        |           |        |  |        |         |              |         |        |        |           |          |          |  |        |        |  |       |              |       |           |       |                        |          |       |
|--|---|---|-------|--------|-----------|--------|---|--------|---------|--------------|---------|--------|--------|-----------|----------|----------|---|--------|--------|---|-------|--------------|-------|-----------|-------|------------------------|----------|-------|
|  | Global  | Americas  |       |        |           |        | Europe  |        |         |              |         |        |        |           |          |          | Africa  |        |        | Asia Pacific  |       |              |       |           |       |                        |          |       |
| Order by global ranking                          |   | Canada  | USA   | Mexico | Venezuela | Brazil | Belgium   | France | Germany | Switzer-land | Denmark | Sweden | Norway | Lithuania | Bulgaria | Portugal | Italy   | Greece | Turkey | Nigeria   | Kenya | South Africa | India | Singapore | China | Hong Kong <sup>1</sup> | Thailand | Japan |
| Labor and Employee Relations                     | 1   | 1   | 1     | 1      | 1         | 2      | 1   | 1      | 1       | 1            | 1       | 1      | 1      | 1         | 1        | 1        | 1   | 1      | 1      | 1   | 2     | 2            | 1     | 2         | 8     | 3                      | 1        | 1     |
| Performance, Rewards and Engagement              | 2   | 3   | 3     | 2      | 4         | 4      | 2   | 2      | 2       | 4            | 3       | 3      | 2      | 2         | 3        | 3        | 2   | 3      | 6      | 6   | 4     | 1            | 3     | 1         | 7     | 2                      | 2        | 2     |
| Talent Acquisition                               | 3   | 2   | 2     | 5      | 6         | 3      | 3   | 5      | 3       | 5            | 5       | 2      | 3      | 3         | 2        | 2        | 3   | 2      | 3      | 2   | 1     | 5            | 2     | 5         | 1     | 4                      | 7        | 3     |
| HR Operating Model                               | 4   | 4   | 5     | 6      | 5         | 6      | 4   | 3      | 7       | 2            | 4       | 6      | 5      | 5         | 8        | 6        | 8   | 5      | 2      | 4   | 5     | 8            | 4     | 3         | 5     | 1                      | 8        | 7     |
| People and HR Strategy, Planning and Analytics   | 5   | 5   | 4     | 4      | 2         | 1      | 7   | 6      | 8       | 7            | 7       | 5      | 6      | 6         | 4        | 5        | 5   | 4      | 4      | 3   | 3     | 6            | 5     | 8         | 2     | 5                      | 4        | 6     |
| Purpose, Behavior, Leadership and Culture Change | 6   | 6   | 6     | 3      | 3         | 4      | 5   | 4      | 4       | 3            | 2       | 4      | 4      | 7         | 5        | 4        | 4   | 6      | 5      | 7   | 7     | 3            | 6     | 4         | 4     | 6                      | 3        | 5     |
| Organizational Transformation                    | 7   | 7   | 7     | 8      | 8         | 8      | 6   | 7      | 5       | 6            | 6       | 7      | 7      | 4         | 7        | 8        | 7   | 7      | 8      | 8   | 8     | 7            | 7     | 6         | 9     | 8                      | 5        | 4     |
| People Development                               | 8   | 8   | 8     | 7      | 7         | 7      | 8   | 9      | 6       | 9            | 8       | 8      | 8      | 8         | 6        | 7        | 6   | 8      | 7      | 5   | 6     | 4            | 8     | 7         | 3     | 9                      | 6        | 8     |
| HR Tech Stack                                    | 9   | 9   | 9     | 9      | 9         | 9      | 9   | 8      | 9       | 8            | 9       | 9      | 9      | 9         | 9        | 9        | 9   | 9      | 9      | 9   | 9     | 9            | 9     | 9         | 6     | 7                      | 9        | 9     |
| Number of responses                              | 6,842   | 423   | 1,371 | 74     | 155       | 207    | 154   | 69     | 210     | 109          | 128     | 98     | 212    | 150       | 133      | 101      | 161   | 144    | 147    | 98  | 55    | 45           | 67    | 48        | 180   | 502                    | 234      | 144   |

1. Hong Kong is a special administrative region of The People's Republic of China  
Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).

# Topic ranking across economies by Current Capabilities

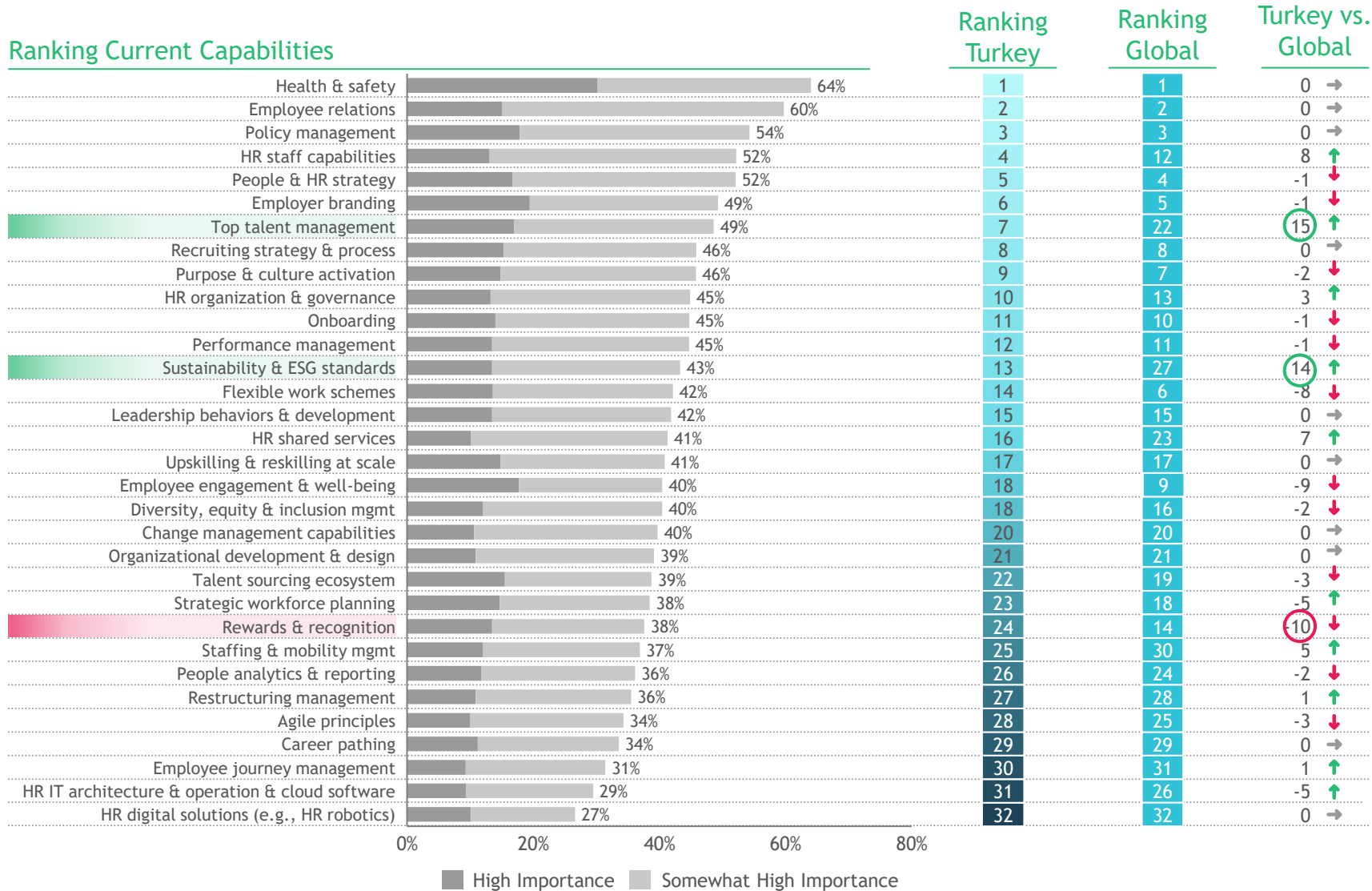
Top & bottom five topics: Current Capabilities

|  |  |  |  |        |           |        |         |        |         |              |         |        |  |  |          |          |        |        |        |              |       |              |       |           |       |                        |          |       |
|--|---|---|---|--------|-----------|--------|---------|--------|---------|--------------|---------|--------|---|---|----------|----------|--------|--------|--------|--------------|-------|--------------|-------|-----------|-------|------------------------|----------|-------|
|  | Global  | Americas  |   |        |           |        | Europe  |        |         |              |         |        |   |   |          |          | Africa |        |        | Asia Pacific |       |              |       |           |       |                        |          |       |
| Order by global ranking                  |   | Canada  | USA   | Mexico | Venezuela | Brazil | Belgium | France | Germany | Switzer-land | Denmark | Sweden | Norway  | Lithuania   | Bulgaria | Portugal | Italy  | Greece | Turkey | Nigeria      | Kenya | South Africa | India | Singapore | China | Hong Kong <sup>1</sup> | Thailand | Japan |
| Health & safety                          | 1   | 2   | 2   | 1      | 2         | 3      | 1       | 3      | 3       | 1            | 1       | 1      | 1   | 2   | 1        | 1        | 1      | 1      | 1      | 1            | 5     | 8            | 1     | 2         | 17    | 26                     | 1        | 4     |
| Employee relations                       | 2   | 1   | 1   | 4      | 1         | 5      | 3       | 2      | 4       | 4            | 4       | 5      | 2   | 3   | 2        | 2        | 2      | 2      | 2      | 5            | 3     | 4            | 2     | 10        | 30    | 16                     | 4        | 8     |
| Policy management                        | 3   | 3   | 3   | 2      | 4         | 12     | 5       | 1      | 1       | 2            | 2       | 14     | 4   | 8   | 8        | 5        | 6      | 3      | 3      | 2            | 8     | 10           | 2     | 4         | 24    | 6                      | 8        | 2     |
| People & HR strategy                     | 4   | 5   | 5   | 6      | 7         | 1      | 9       | 11     | 23      | 18           | 7       | 6      | 7   | 7   | 4        | 6        | 8      | 7      | 5      | 6            | 9     | 4            | 5     | 15        | 16    | 10                     | 9        | 11    |
| Employer branding                        | 5   | 6   | 6   | 4      | 13        | 11     | 12      | 22     | 9       | 12           | 9       | 8      | 14  | 16  | 11       | 9        | 10     | 18     | 6      | 7            | 4     | 13           | 17    | 20        | 1     | 3                      | 12       | 7     |
| Restructuring management                 | 28  | 22  | 29  | 27     | 16        | 30     | 21      | 21     | 14      | 23           | 21      | 20     | 21  | 21  | 24       | 31       | 24     | 26     | 27     | 27           | 27    | 16           | 26    | 25        | 31    | 23                     | 20       | 23    |
| Career pathing                           | 29  | 29  | 24  | 26     | 29        | 26     | 29      | 25     | 27      | 29           | 31      | 27     | 32  | 30  | 29       | 28       | 28     | 31     | 29     | 25           | 28    | 23           | 31    | 30        | 21    | 17                     | 25       | 28    |
| Staffing & mobility mgmt                 | 30  | 28  | 27  | 24     | 23        | 31     | 19      | 23     | 25      | 30           | 27      | 29     | 25  | 17  | 25       | 21       | 25     | 25     | 25     | 17           | 29    | 28           | 29    | 28        | 11    | 30                     | 25       | 24    |
| Employee journey management              | 31  | 31  | 31  | 32     | 30        | 24     | 25      | 27     | 26      | 24           | 29      | 30     | 30  | 24  | 26       | 30       | 29     | 20     | 30     | 31           | 31    | 22           | 30    | 26        | 32    | 32                     | 31       | 30    |
| HR digital solutions (e.g., HR robotics) | 32  | 32  | 32  | 31     | 32        | 29     | 32      | 27     | 31      | 27           | 32      | 32     | 31  | 32  | 32       | 32       | 32     | 32     | 32     | 32           | 32    | 32           | 32    | 31        | 26    | 21                     | 32       | 32    |
| Number of responses                      | 6,842   | 423   | 1,371   | 74     | 155       | 207    | 154     | 69     | 210     | 109          | 128     | 98     | 212   | 150   | 133      | 101      | 161    | 144    | 147    | 98           | 55    | 45           | 67    | 48        | 180   | 502                    | 234      | 144   |

1. Hong Kong is a special administrative region of The People's Republic of China  
Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).

# Ranking of 32 topics for Current Capabilities Global vs Turkey; significant differences in 4 topics

Turkey








## Turkey vs. Global comparison

- ↑ Current **Top talent management**, and **Sustainability & ESG standards** capabilities ranked significantly higher
- ↓ Current **Rewards & recognition** capabilities ranked significantly lower

Source: 2023 BCG/WFPA proprietary web survey and analysis (Global n = 6,842, all Turkey total n = 147).






Future Importance: Ranking of nine clusters across economies

|  |  |  |  |        |           |        |         |        |         |              |         |        |  |  |          |          |        |        |        |              |       |              |       |           |       |                        |          |       |
|--|---|---|---|--------|-----------|--------|---------|--------|---------|--------------|---------|--------|---|---|----------|----------|--------|--------|--------|--------------|-------|--------------|-------|-----------|-------|------------------------|----------|-------|
|  | Global  | Americas  |   |        |           |        | Europe  |        |         |              |         |        |   |   |          |          | Africa |        |        | Asia Pacific |       |              |       |           |       |                        |          |       |
| Order by global ranking                          |   | Canada  | USA   | Mexico | Venezuela | Brazil | Belgium | France | Germany | Switzer-land | Denmark | Sweden | Norway  | Lithuania   | Bulgaria | Portugal | Italy  | Greece | Turkey | Nigeria      | Kenya | South Africa | India | Singapore | China | Hong Kong <sup>1</sup> | Thailand | Japan |
| People and HR Strategy, Planning and Analytics   | 1   | 2   | 3   | 4      | 3         | 1      | 3       | 3      | 1       | 2            | 2       | 1      | 2   | 3   | 2        | 2        | 4      | 3      | 1      | 4            | 7     | 1            | 1     | 1         | 1     | 4                      | 1        | 1     |
| Performance, Rewards and Engagement              | 2   | 3   | 1   | 3      | 2         | 2      | 5       | 2      | 5       | 4            | 7       | 3      | 5   | 2   | 1        | 1        | 1      | 2      | 4      | 2            | 1     | 2            | 4     | 3         | 3     | 5                      | 2        | 3     |
| Talent Acquisition                               | 3   | 1   | 2   | 6      | 7         | 4      | 2       | 1      | 4       | 1            | 3       | 4      | 3   | 1   | 5        | 4        | 3      | 1      | 2      | 5            | 5     | 5            | 2     | 2         | 9     | 9                      | 5        | 5     |
| Purpose, Behavior, Leadership and Culture Change | 4   | 4   | 6   | 2      | 6         | 3      | 1       | 4      | 3       | 3            | 1       | 2      | 1   | 4   | 6        | 3        | 2      | 4      | 3      | 6            | 3     | 3            | 6     | 4         | 4     | 8                      | 3        | 4     |
| People Development                               | 5   | 6   | 5   | 7      | 8         | 8      | 4       | 6      | 7       | 7            | 6       | 6      | 8   | 5   | 4        | 5        | 5      | 6      | 5      | 3            | 8     | 4            | 5     | 5         | 2     | 6                      | 4        | 2     |
| Labor and Employee Relations                     | 6   | 5   | 4   | 1      | 1         | 5      | 9       | 7      | 9       | 8            | 9       | 8      | 7   | 8   | 3        | 6        | 8      | 5      | 9      | 1            | 2     | 8            | 3     | 6         | 8     | 3                      | 8        | 9     |
| HR Tech Stack                                    | 7   | 9   | 9   | 5      | 9         | 6      | 6       | 5      | 2       | 5            | 4       | 5      | 4   | 7   | 8        | 8        | 7      | 7      | 6      | 9            | 9     | 7            | 8     | 8         | 7     | 1                      | 7        | 6     |
| Organizational Transformation                    | 8   | 8   | 8   | 8      | 5         | 9      | 7       | 9      | 6       | 6            | 5       | 7      | 6   | 6   | 7        | 7        | 6      | 8      | 8      | 7            | 4     | 6            | 9     | 7         | 5     | 7                      | 6        | 7     |
| HR Operating Model                               | 9   | 7   | 7   | 9      | 4         | 7      | 8       | 8      | 8       | 9            | 8       | 9      | 9   | 9   | 9        | 9        | 9      | 9      | 7      | 8            | 6     | 9            | 7     | 9         | 6     | 2                      | 9        | 8     |
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1. Hong Kong is a special administrative region of The People's Republic of China  
Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).

# Topic ranking across economies by Future Importance

Top & bottom five topics: Future Importance

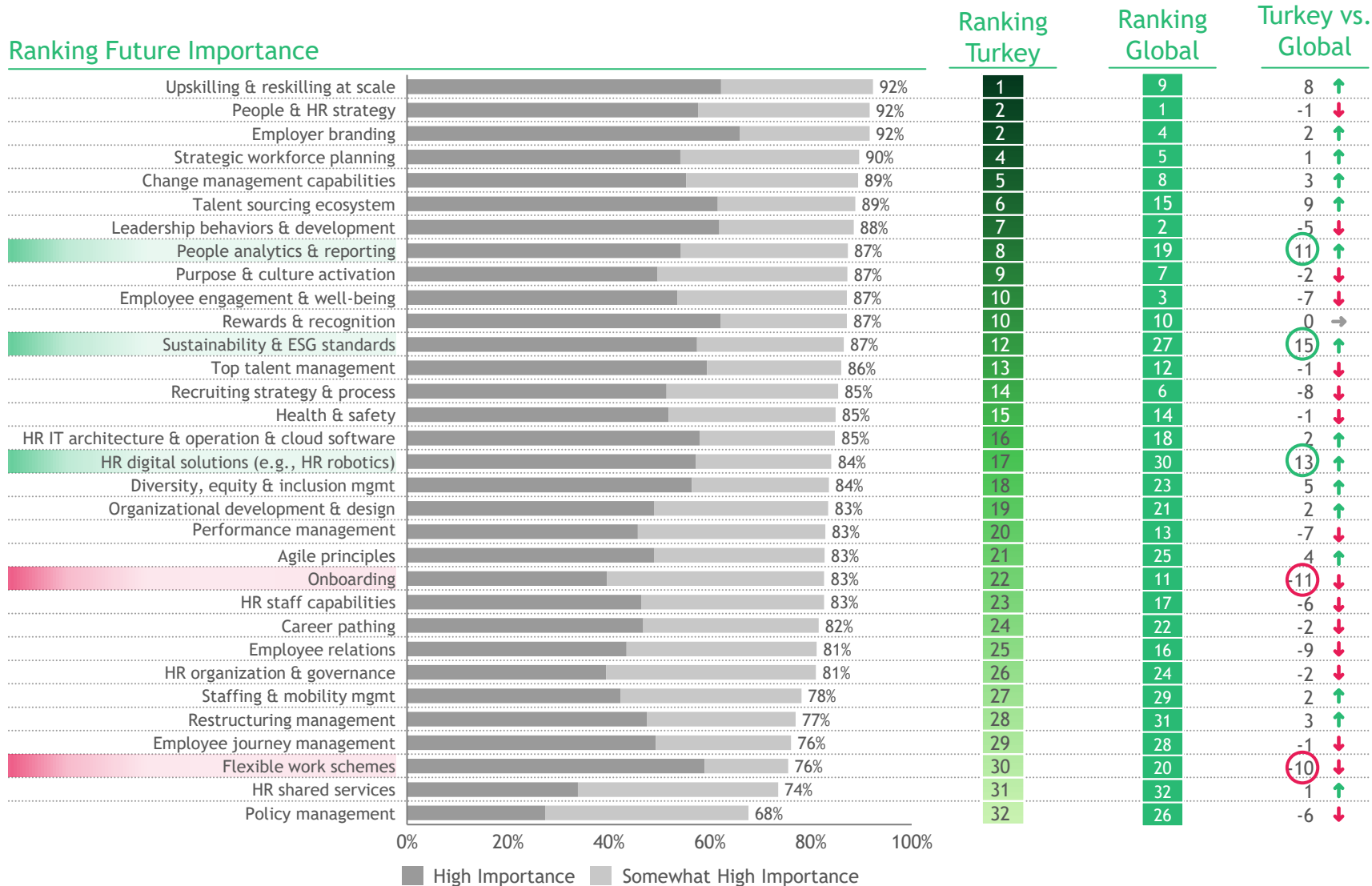
|  |  |  |  |        |           |        |         |        |         |              |         |        |  |  |          |          |        |        |        |              |       |              |       |           |       |           |          |       |
|--|---|---|---|--------|-----------|--------|---------|--------|---------|--------------|---------|--------|---|---|----------|----------|--------|--------|--------|--------------|-------|--------------|-------|-----------|-------|-----------|----------|-------|
|  | Global  | Americas  |   |        |           |        | Europe  |        |         |              |         |        |   |   |          |          | Africa |        |        | Asia Pacific |       |              |       |           |       |           |          |       |
| Order by global ranking                  |   | Canada  | USA   | Mexico | Venezuela | Brazil | Belgium | France | Germany | Switzer-land | Denmark | Sweden | Norway  | Lithuania   | Bulgaria | Portugal | Italy  | Greece | Turkey | Nigeria      | Kenya | South Africa | India | Singapore | China | Hong Kong | Thailand | Japan |
| People & HR strategy                     | 1   | 1   | 1   | 1      | 1         | 1      | 2       | 8      | 3       | 2            | 3       | 3      | 3   | 1   | 3        | 1        | 1      | 1      | 2      | 3            | 15    | 1            | 1     | 1         | 2     | 10        | 1        | 1     |
| Leadership behaviors & development       | 2   | 4   | 4   | 3      | 5         | 2      | 1       | 6      | 2       | 5            | 2       | 1      | 2   | 6   | 7        | 4        | 3      | 4      | 7      | 6            | 6     | 3            | 4     | 4         | 6     | 18        | 2        | 4     |
| Employee engagement & well-being         | 3   | 2   | 2   | 5      | 7         | 4      | 3       | 7      | 1       | 1            | 1       | 2      | 1   | 2   | 1        | 3        | 2      | 6      | 10     | 20           | 5     | 1            | 6     | 13        | 11    | 28        | 4        | 3     |
| Employer branding                        | 4   | 5   | 6   | 7      | 24        | 8      | 5       | 1      | 9       | 3            | 4       | 4      | 8   | 5   | 18       | 6        | 5      | 2      | 2      | 11           | 22    | 13           | 5     | 3         | 10    | 14        | 11       | 5     |
| Strategic workforce planning             | 5   | 10  | 10  | 12     | 19        | 5      | 11      | 9      | 5       | 10           | 12      | 6      | 6   | 10  | 10       | 10       | 14     | 15     | 4      | 15           | 27    | 10           | 2     | 2         | 1     | 12        | 8        | 2     |
| Employee journey management              | 28  | 26  | 28  | 27     | 26        | 29     | 22      | 12     | 23      | 27           | 25      | 15     | 25  | 15  | 29       | 27       | 21     | 24     | 29     | 25           | 18    | 28           | 27    | 21        | 31    | 31        | 26       | 25    |
| Staffing & mobility mgmt                 | 29  | 27  | 25  | 29     | 27        | 32     | 17      | 26     | 30      | 29           | 22      | 28     | 31  | 26  | 31       | 30       | 30     | 29     | 27     | 31           | 31    | 21           | 25    | 30        | 20    | 29        | 29       | 10    |
| HR digital solutions (e.g., HR robotics) | 30  | 31  | 32  | 23     | 32        | 23     | 27      | 28     | 11      | 24           | 13      | 21     | 20  | 22  | 30       | 27       | 28     | 30     | 17     | 32           | 32    | 29           | 30    | 20        | 22    | 8         | 28       | 26    |
| Restructuring management                 | 31  | 32  | 29  | 31     | 20        | 31     | 30      | 31     | 28      | 31           | 29      | 29     | 28  | 23  | 27       | 31       | 29     | 31     | 28     | 28           | 29    | 30           | 29    | 29        | 15    | 25        | 24       | 28    |
| HR shared services                       | 32  | 30  | 31  | 32     | 23        | 28     | 32      | 32     | 31      | 32           | 30      | 31     | 32  | 32  | 32       | 32       | 32     | 32     | 31     | 29           | 30    | 32           | 32    | 32        | 17    | 6         | 31       | 31    |
| Number of responses                      | 6,842   | 423   | 1,371   | 74     | 155       | 207    | 154     | 69     | 210     | 109          | 128     | 98     | 212   | 150   | 133      | 101      | 161    | 144    | 147    | 98           | 55    | 45           | 67    | 48        | 180   | 502       | 234      | 144   |

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Source: 2023 BCG/WFPMA proprietary web survey and analysis (n = 6,842).



# Ranking of 32 topics for Future Importance Global vs Turkey; significant differences in 5 topics

Turkey



## Turkey vs. Global comparison

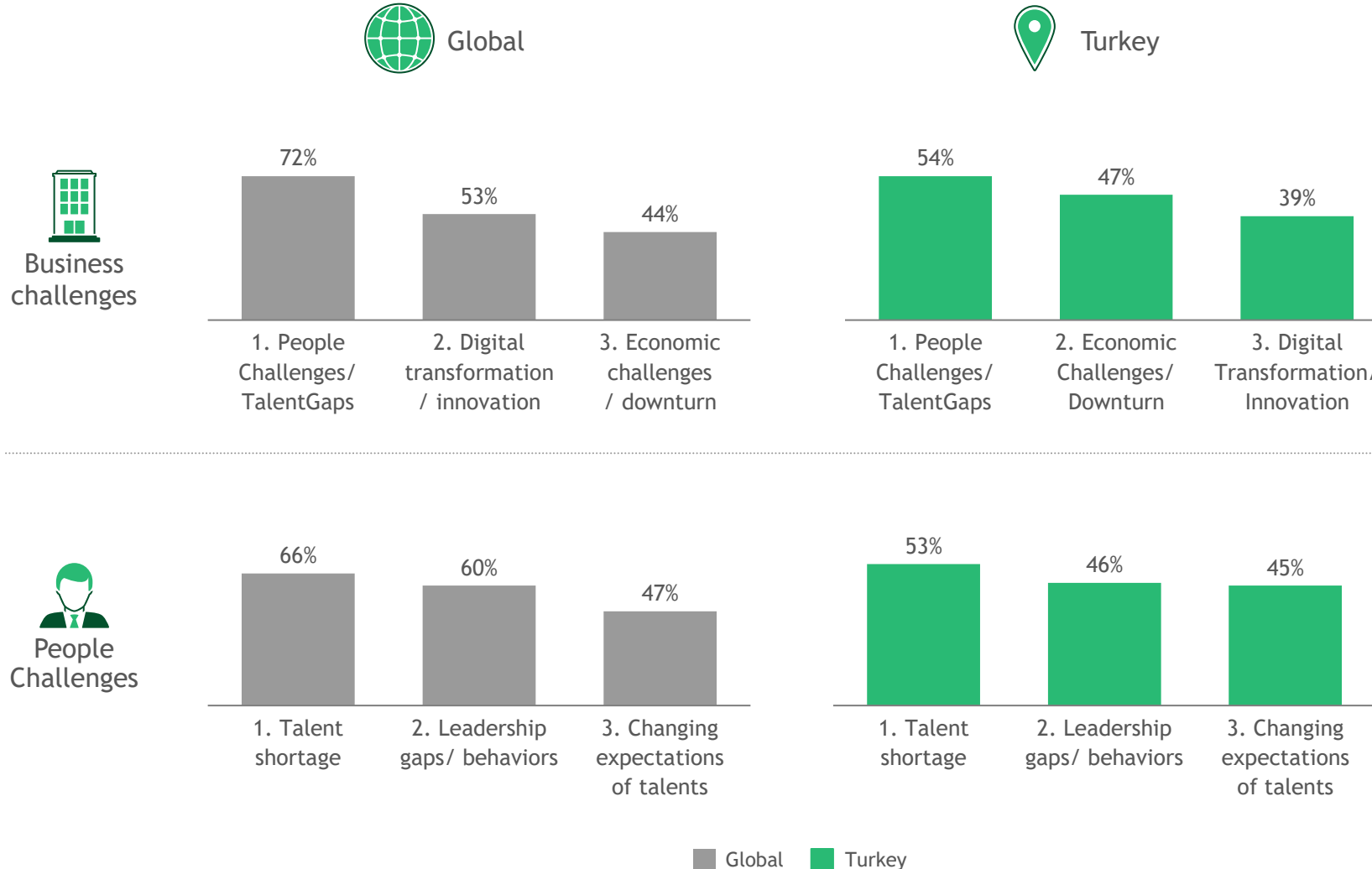


Future importance of **People analytics & reporting**, **Sustainability & ESG standards**, and **HR digital solutions (e.g., HR robotics)** ranked significantly higher



Future importance of **Onboarding**, and **Flexible work schemes** ranked significantly lower

# People and business challenges in Turkey are not different from global averages

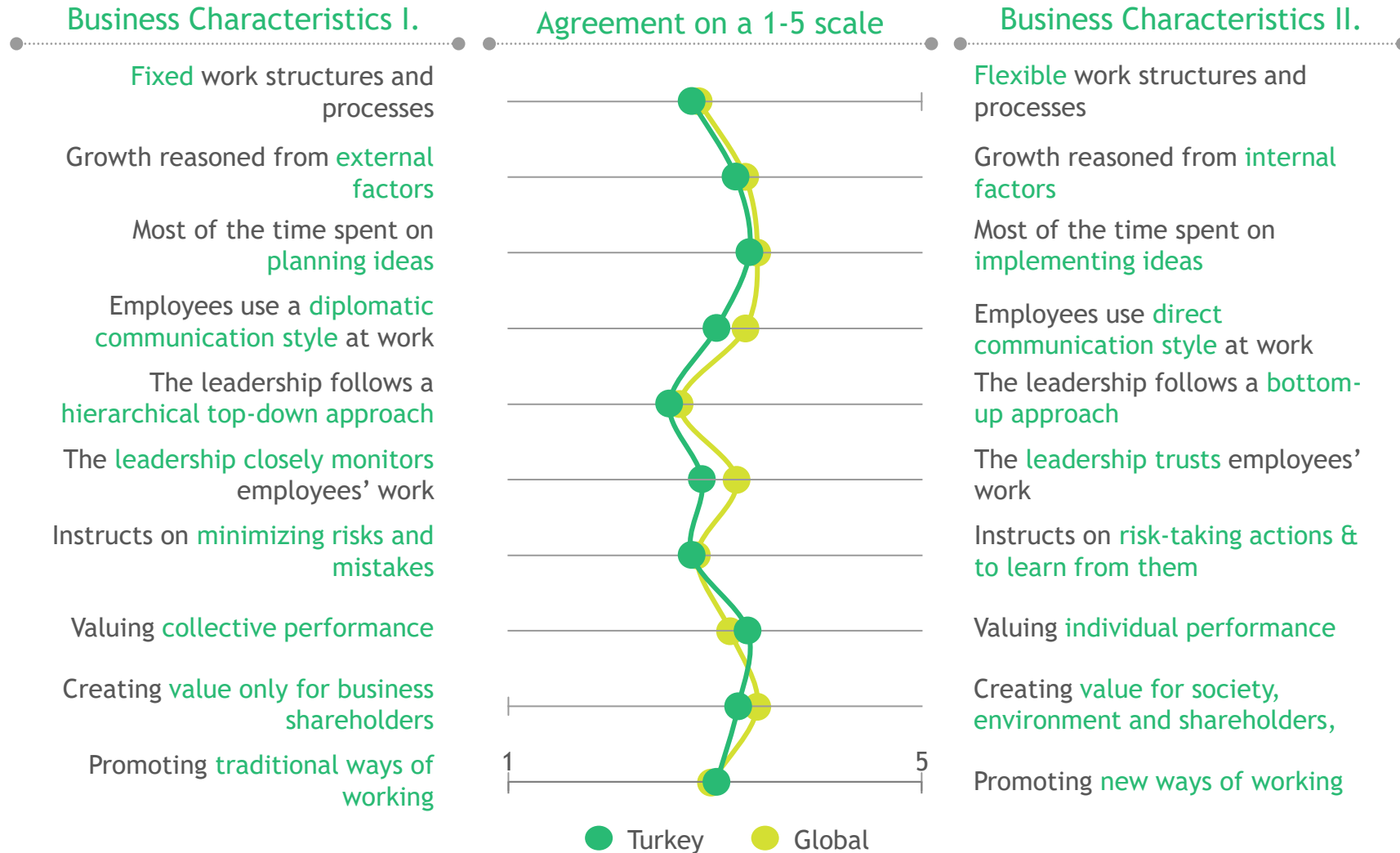


## Turkey vs. Global comparison

- Business and people challenges are almost the same with global result



## Core business characteristics; Turkey correlates strongly with global averages

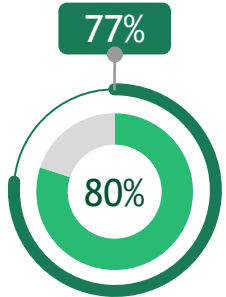


Source: 2023 BCG/WFPMA proprietary web survey and analysis (Global n = 6,169, all Turkey total n = 147).

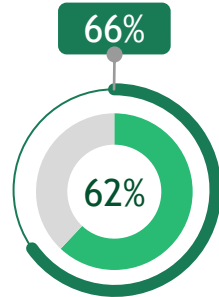
### Turkey vs. Global comparison

- Business characteristics in Turkey are very comparable to global results

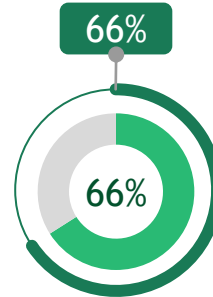
# Using data and analytics, and talent scarcity mitigation seem to be the 2 biggest HR challenges in Turkey



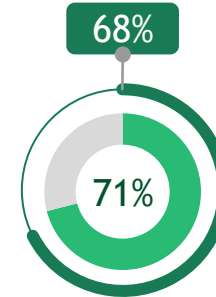
80% of survey respondents say that HR is in **constant dialogue with the business** and its needs



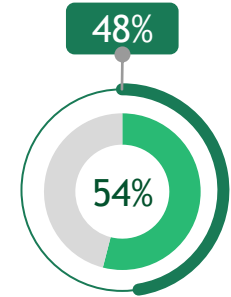
62% of survey respondents say that within the organization, the **People Perspective** is strongly supported and defended



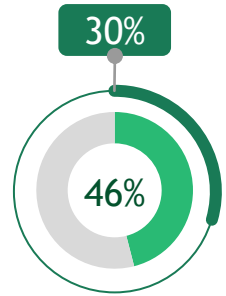
66% of survey respondents say that HR is **proactively shaping the strategic agenda** with regards to people & organization topics



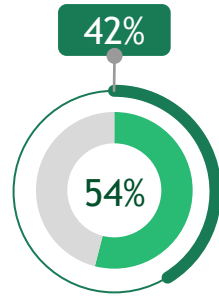
71% of survey respondents say that HR is an **important part of the corporate strategic decision-making process**



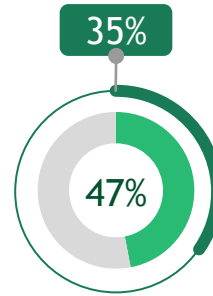
54% of survey respondents say that **diversity is engrained on all processes** and ways to benefit from the **positive impacts** are in place



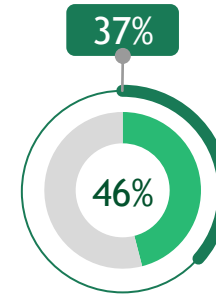
46% of survey respondents say that HR is **using data and analytics** to anticipate people challenges



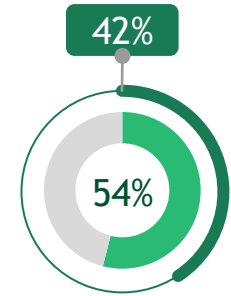
54% of survey respondents say that **sustainability aspects** are reflected in all people practices



47% of survey respondents say that HR is **using relevant digital technologies**



46% of survey respondents say that HR finds **proactive and effective ways to mitigate talent scarcity**



54% of survey respondents say that HR **processes are seamlessly integrated**

Note: Percentage agreement by answers “agree” or “tend to agree” to the listed hypotheses  
Source: 2023 BCG/WFPMA proprietary web survey and analysis (Global n = 5,875, all Turkey total n = 147).)

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