

Let's get real about
equality

When Women Thrive 2020
Turkey Report





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About Mercer

01 Foreword

It's time to get real about gender equality in Turkey. Around the world, today's leaders understand that diverse teams bring value to organisations, and that companies with a more equal gender balance substantially outperform those without. Yet, here in our country, we're still a long way from equality in the workforce.

Across industries, women continue to face challenges—from unequal pay to the absence of support systems and limited access to opportunity for career development and advancement. These realities face organisations not only in Turkey, but globally, and are why, six years ago, we at Mercer founded our **When Women Thrive, Businesses Thrive** research and consulting practice. Since then, we've gone from proving the business case for gender equality to how to accelerate the trajectory and get it done.

We're continuing to invest in this research for our clients because diversity and inclusion are good not only for business but also for society. I am delighted to announce that Mercer is sharing results specific to Turkey. It includes learnings from organisations in numerous sectors, covering more than 130,000 employees.

The findings may surprise you, and I certainly hope they inspire and motivate you, as they did me. Indeed, in our research, 94% of respondents from Turkey report that their organisations are already focused on improving diversity and inclusion. This is an overwhelming majority and an incredibly positive sign. Yet, as leaders, we know much more must be done to surmount the challenges women face in our country, including addressing traditional attitudes about women's roles in the workforce, and at home, particularly once women have children. While there has been tremendous progress, some traditional views on the role of women in Turkey continue to hold many back.

Encouragingly, government leaders recognize the importance and urgency of improving – and achieving – gender balance within the workforce and society. In fact, equality and women's rights have become core tenets of election speeches and declarations by all political parties. But better than words, we see our political leaders taking action – even though the actions are taken slowly and in very small steps.

In just the past year, the government has initiated new programmes to boost women's participation in the

workforce, including enhanced maternity and breastfeeding leave, and better nursery and day-care options, to help women return to their jobs after giving birth. Paternity leave has also been extended from three to five days.

The call for greater gender equality has also grown louder with organisations throughout the country embracing the global HeforShe movement launched by UN Women. Even the nation's top football clubs have gotten involved, broadcasting HeforShe messages during games, and we are seeing private sector companies – notably Koç Holding – publicly embrace the campaign and its goals.

Perhaps the biggest push for gender equality, though, will come from millennials and Generation Z, the youngest cohort now entering the work force. These generations in Turkey, as well as globally, are vocal advocates for purpose-led organisations. They want to feel good about what they are doing and who they are working for – in other words, organisations that do the right thing, have clear values that permeate the entire organisation, and that treat all employees fairly and equally.

So, what will move the needle toward gender equality and true diversity and inclusion?

Our 2020 **When Women Thrive** research shows that three key components, when put together, will drive real change. Gender equality can thrive at organisations that:

1. **Use data-driven insights** to inform decisions and measure success, leveraging assessments such as Mercer's Internal Labour Market Analysis® methodology.
2. **Set clear and visible goals** that ensure values don't get diluted.
3. **Drive culture and tone from the top:** A deep leadership commitment to taking action and engaging employees in driving change.

Organisations agree on the imperatives of gender equality, diversity and inclusion, so why is progress so slow? I hold that there's not enough accountability. We need leaders who not only believe in the business value of diversity and inclusion but also take responsibility for it, ensuring that it flows throughout the organisation — not as a mandate, but as a powerful component of culture.

At Mercer, we routinely take a hard, objective look at ourselves, our leaders, our processes and our programs to find opportunities for impact; for example, we did a

business impact analysis and found that project teams with greater gender diversity had 28% higher win rates.

Policies, processes and programs need to be aligned and connected to eliminate bias — especially the unconscious bias that leads people to hire and develop people who look, talk and think like they themselves do.

These are challenging goals and aspirations, but the organisations that live up to them will empower themselves and their employees for a better future. I have great confidence that the organisations from Turkey represented in this research will be a force for change within our country, creating inspiring models for others to follow.

In addition, I want to thank two of our partners for their support and collaboration in this year's report. The Professional Women's Network (PWN) in Turkey has provided ongoing strategic guidance that has been invaluable. We also could not have completed this project without the People Management Association of Turkey (PERYON), which served as our research partner on the study. To both, I offer my gratitude and look forward to our ongoing partnership.



Işıl Çayırılı Ketenci
Principal
Mercer Turkey

About this report

In March 2020, Mercer published Let's Get Real About Equality: When Women Thrive 2020 Global Report, which builds upon our seminal 2014 and 2016 research. It looks at the achievements made to date and the ground yet to cover. What follows are insights, based upon data and country-to-global comparisons, for Turkey.

In some sections, we also include comparisons to the 2017 When Women Thrive Turkey Country Report, based on our 2016 research, to illustrate significant changes in the past three years. In our 2020 report, we saw greater representation from large Turkish organizations than in our 2017 report – 28% in 2017 vs. 53% in 2020. While the increase is a positive development, in some cases, it resulted in negative variations in responses between the two reporting periods. We have highlighted this in the pages to follow.

Learnings from this research will help guide organisations in the steps they must take to successfully institutionalize the policies, practices and programs that will help ensure equality of opportunity, experience and pay — and ultimately nurture an inclusive culture.

Our 2020 research is notable for its remarkable size and geographic scope, placing it as one of the most comprehensive workforce gender equality studies in the world. We observed a substantial increase in participation from regions and countries, including in Turkey, where the focus on diversity and inclusion (D&I) is still emerging, but emerging rapidly based upon our findings.

As you review the results, it is important to note that while much of the data is promising, it may not be fully reflective of all organisations in Turkey. Rather, results may be influenced by the participation of a self-selected, sub-set of multinational and forward-looking Turkish organizations that already prioritize D&I strategies and practices. While these points of view may not be indicative of all organisations, there are promising signs that they are helping to create a powerful model for others to follow.

In addition to the Turkey report, Mercer is publishing 17 reports in 2020 to share insights and solutions relevant to particular geographies and industries. Our global and regional responses for each survey question are available for download at www.mercer.com/wwt-research.

Global report scope

Size

1,157
organizations

People

2.8 million
women and seven million employees

Geographies

54 countries
across Asia, Australia and New Zealand,
Europe, Latin America, Middle East and Africa,
and North America

Turkey scope

Size

68
organisations, of which 32 are affiliates of
multinational organizations

People

130,000
employees

Geographies

Turkey

About the When Women Thrive survey

Our 2020 global study was fielded between September 23 and November 22, 2019. Respondents were surveyed on topics relating to:

- Engagement, accountability and leadership
- Organisational design and governance
- Pay equity commitments and analysis
- Talent practices and career development
- Financial wellness, health and caregiving
- Organisational flexibility
- Policies and programs

Respondents provided workforce data aggregated by gender, age group and career level for a 12-month period, including starting and ending headcounts, hires, promotions and exits.

Data was analysed using descriptive statistics and Mercer's proprietary Internal Labour Market Analysis® (ILM) mapping, which has been a hallmark of the When Women Thrive research.

Defining diversity, inclusion and gender

For the purposes of the report, we define diversity as a variation in backgrounds, attitudes, values, beliefs, experiences, behaviours and lifestyle preferences with respect to gender; race; ethnicity; nationality; language; age; cognitive and physical abilities and characteristics; sexual orientation; education; religion; socio-economic situation; marital status; social role; personality traits; and ways of thinking.

We define inclusion as practices that provide an equitable and fair distribution of resources, such as jobs, income and access to opportunities and information, which ultimately drive and support a culture where all members can thrive. Such acts and practices enable all members, including those from underrepresented groups, to be respected and appreciated for their unique contributions and to be fully integrated into the formal and informal networks of an organisation.



“At Mercer, we fully embrace the concept of diversity and inclusion – for when women thrive, our businesses and our clients thrive. The collective success and recognition of women goes even further – it allows our families, our communities, our countries and our society to thrive. By driving more equality, we are creating a better, more prosperous and more equitable world for everyone.”

— Tarek Lotfy,
Zone Leader and CEO for India, Middle East, Turkey and Africa (IMETA), Mercer



02



How do we boldly shape a diverse workforce and inclusive culture?

In the five years since Mercer conducted its groundbreaking research and published the landmark global report *When Women Thrive, Businesses Thrive*, “thriving” has embodied the spirit of an era indelibly marked by empowering movements. The pursuit of workforce D&I culture has become a front-and-centre pursuit for organisations around the world.

In this report, we take a deep dive into where D&I is now in Turkey and address the critical question: “What actions are needed to boldly shape the future?”

The research provides encouraging evidence of shifts, developments and tangible traction as organisations take the steps necessary to make progress. An overwhelming majority (94%) of organisations surveyed in the region (compared to 81% globally) reported that broadly improving D&I is “important” or “very important.” This is a bright spot and certainly a reason for optimism. As noted, however, we realise, that the optimism and progress we found in our research may not be reflective of the country as a whole.

Gender equality, though, is only one dynamic in an increasingly ethnically, economically, generationally and educationally diverse workforce. It requires more holistic approaches and systemic changes to ensure that the workplaces of the future are fit for purpose. This means embedding practices that ensure a continued diverse talent flow throughout organisations, along with policies that guarantee equal opportunity, experience and pay for all employees. It also means concertedly addressing and meeting the unique needs of women — from health and well-being, to financial wellness and caregiving — and embracing the perspectives, roles and support of middle and frontline managers (men and women).

Though optimistic, we are also realistic. Challenges and barriers remain. When we encourage organisations to “get real,” it’s a call to take specific actions that will, over time, systematically surmount challenges and knock down barriers. We are biased in favour of incremental

steps toward progress over sweeping commitments or pledges that lack a concrete plan of action. After all, achieving equality of opportunity, experience and pay is hard work; let’s be smart about how we do it.

Let’s Get Real About Equality: When Women Thrive 2020 Turkey Report enables organisations to progress further from wherever their starting point may be. We provide guidance for those looking to get started and activate, those building on a strong foundation to accelerate, or those ready to truly thrive.

At Mercer, our position on “thriving” has evolved along with the times and, fittingly, we are embracing the concept in a more inclusive way. Truly, when women thrive, businesses thrive; we now have more and more examples demonstrating that this is indeed the case. But today, women thriving transcends business. When women thrive, so do men, families, communities, countries and society as a whole. Collectively, by driving equality, we are creating a better, more equitable world for everyone.



At the end of the day, 50% of the world is made up of women, and if we’re in a people-oriented business and not tapping into that talent, we’re not going to be successful.

— Sheri Bronstein,
Chief Human Resources Officer, Bank of America



Context: Pressure cooker

Over the past five years, important factors and forces have emerged and evolved, resulting in increased pressure on organisations for greater progress. This pressure is coming from many directions. So much so, few organisations are untouched in some way:

- Growing societal and cultural awareness:** Academic research by TUSIAD and the Association of Turkish Advertisers (RVD) have shined a light on the prevalence and effects of gender bias in Turkish TV shows and advertising, leading to calls for change. The Gender and Women's Studies Research Centre at Kadir Has University is also actively capturing and sharing trends in social, academic and business life in Turkey. There is also a surge in the number of Turkish non-profit organizations, such as [PWN](#), [PERYON](#), [Yuzde 30 Kulübü](#) and [KAGIDER](#), working to raise awareness of the gender gap in Turkey and pushing for the adoption of more robust D&I policies. A growing number of multinational and forward-looking Turkish businesses are also exerting pressure on their private sector colleagues by becoming more family-friendly – some adopting global paternity leave policies, for example.
- Environmental, social and corporate governance (ESG):** The rise in ESG investing has increased the focus on diversity as a way for stakeholders to measure the social impact of an investment. We've also seen an increase in voluntary disclosure of gender representation by organisations, notably in the tech sector, and a growing recognition among business leaders that gender parity provides a competitive advantage. For example, in September 2018, media company Bloomberg announced the launch of its Gender Equality Index, a partnership with the U.K. government to track the performance of public organisations with a commitment to advancing women globally.
- Shareholder activism:** Activism among shareholders is also on the rise, with resolutions promoting further progress and diversity gaining increasing support. For example, in January 2019, Arjuna Capital challenged 12 top banks and technology giants to reveal their median gender pay gap.¹ In Turkey, some shareholders have also pushed businesses to publish sustainability metrics, although this continues to be a voluntary practice for the majority of organisations.
- Regulation and quotas:** More countries, especially in Europe, now have gender quotas for senior executives and boards. In Turkey, the Istanbul municipal government, as well as a few others, have formalized a policy to recruit women for traditional male roles such as bus drivers.
- Pay-equity mandates:** And, of course, mandates to bridge pervasive pay gaps are high on the agenda. Governments, such as in the U.K. and France, have issued new reporting requirements on gender-pay differences, with 40 economies enacting 62 reforms that will help women realise their potential and contribute to economic growth and development globally.²
- Millennial and Generation Z demands:** These generations have experienced an equality of opportunity and experience in education, sports and more. They expect it in the workplace as well, along with equal pay, and are vocal and active in ensuring they get it.

All of these developments come in an environment where the fundamental role of business is shifting. In January 2020, the World Economic Forum published the Davos Manifesto 2020: The Universal Purpose of a Company in the Fourth Industrial Revolution.³ It redefines the purpose of a company as serving not only its shareholders, but all of its stakeholders – employees, customers, suppliers, local communities and society at large – in the creation of shared and sustained value.

¹ Arjuna Capital. "12 US Banks and Tech Giants Targeted with 'Median Gender Pay Gap' Shareholder Proposal," February 13, 2019, available at <http://arjuna-capital.com/news/press-release-12-u-s-banks-and-tech-giants-targeted-with-median-gender-pay-gap-shareholder-proposal>.

² The World Bank. *40 Economies Make 62 Legal Reforms to Advance Women's Economic Participation*, 2020, available at www.worldbank.org/en/news/press-release/2020/01/14/40-economies-make-62-legal-reforms-to-advance-womens-economic-participation.

³ UAE Cabinet, available at <https://uaecabinet.ae/en/details/news/mohammed-bin-rashid-approves-new-law-on-equal-pay>.

⁴ Generations are defined as: Generation Z born from 1997 onwards, millennials born between 1981 and 1996, Generation X born between 1965 and 1980, and baby boomers born between 1946 and 1964.

⁵ The World Economic Forum. *Davos Manifesto 2020: The Universal Purpose of a Company in the Fourth Industrial Revolution*, 2019, available at <https://www.weforum.org/agenda/2019/12/davos-manifesto-2020-the-universal-purpose-of-a-company-in-the-fourth-industrial-revolution/>.

Add into the mix countless media headlines; increasing pressure from worker affinity, activist and advocacy groups; and demands from shareholders and stakeholders, and these voices will not be ignored. Plus — and this is a big plus — the business case has been proven, time and time again!

In Turkey, organisations report receiving significantly less pressure to improve D&I than the global average (12% in Turkey vs. 31% globally). This may be due to less D&I governmental regulation than we see in other countries. The pressure that they do feel comes from multiple sources:



Board
(66% globally)



Employees
(65% globally)



External
(41% globally)

Geoffrey Rubin,
Senior Managing Director &
Chief Investment Strategist,
Canada Pension Plan
Investment Board (CPPIB)

“The board of directors is our primary entry point into corporations, and it’s normal to engage very forcefully with boards where there is not even a single female leader in their representation. That’s where we have a real opportunity, as institutional investors, to very effectively and meaningfully engage – it’s not just about words, but about where we are investing.”

Rayna Edwards,
Workforce Strategy Consultant,
Mercer

“The business case for diversity and inclusion is no secret. Increasing demands for transparency and equality by consumers, clients, employees, boards and investors have brought diversity and inclusion to the forefront. Successful organisations will look unflinchingly at their diversity and inclusion data, create goals and metrics grounded in those data, and hold themselves accountable for achieving those goals.”

Brave new world

Our latest research in Turkey found bright spots and progress that demonstrates forward momentum with the potential for lasting impact. But we also found clear learning curves and room for growth, especially given that the overall female labour force participation is low.⁴ In fact, recent data show women comprise only 39% of the Turkish workforce.⁵

Over the years, Mercer has gained a better understanding of the evolving D&I universe. For a new organisation just opening its doors, we can confidently advise them on the practices, policies, programs and processes necessary to sustain a diverse workplace with an inclusive culture.

For most other organisations, in real terms, reaching that mark will require pushing past parity in hiring, retention and promotion, and getting to root causes of differences in the career trajectories of women compared with men. It will necessitate perseverance over time. These efforts are playing out in a complex ecosystem with multiple stakeholders under scrutiny – internally and externally – from employees and boards to activist groups and customers.

So how do we actually get to where we want to go? We lay it out in the three main sections of the report.

Out on the horizon yet within our grasp lies the Closing the workforce gender gap (see Section 3). The road has been partly paved by the progress we have made so far, and the signposts are promising. Here, we are learning from what is working and are applying it at warp speed.

What we see in Turkey are organisations actively engaged and taking concrete steps to change the trajectory – with scores exceeding those of the global average.

- 94% of organisations say improving D&I is high on their agenda (compared to 81% globally)
- 68% of organisations say senior executives are actively involved/engaged in D&I programs and initiatives (compared to 66% globally)

- 63% of organisations actively seek external recognition for their D&I efforts such as inclusion on indices, awards and certification (compared to 42% globally)
- 81% say pay equity is part of their organisation's compensation philosophy or strategy (compared to 74% globally).

Vital to activating and accelerating progress is strategically aligning D&I goals with business objectives. Are D&I success measures in one silo and business success metrics in another? Are data and technology being harnessed and maximised across enterprises to empirically guide D&I strategies to increase the probability of success? In Section 4, we examine how to **Walk the talk**.

Also crucial is cultural alignment. Are our policies saying one thing and our managers doing another? The importance of culture underpinned by core values, as well as processes, programmes and accountability, cannot be underestimated. We have to **Hardwire it!** into the organisation to make it stick (see Section 5).

So, with all stakeholders working together, we can most certainly go further, faster. A coordinated effort among organisations, industries, communities and countries will move things forward to truly ensure equality of opportunity, experience and pay.

⁴ World Economic Forum. "Global Gender Gap Report 2020," available at http://www3.weforum.org/docs/WEF_GGGR_2020.pdf.

⁵ Turkstat (Turkish Statistical Association). Labour Force Statistics 2019 December. Available at <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=33784>.

The six Ps of an effective gender diversity strategy⁶

We have identified six Ps that we believe are critical for organizations to achieve success:

- 1. Passionate leadership**
Women thrive when leaders at all levels are passionately engaged.
- 2. Personal commitment**
Women thrive when both men and women are engaged and see gender equality as a win-win.
- 3. Perseverance**
Women thrive when an organization's commitment to gender equality can sustain leadership changes and persevere over time.
- 4. Proof of what's helping and what's hurting**
Women thrive when organizations use data to understand where they have gaps — and build an evidence-based strategy to close them.
- 5. Processes that actively support women**
Women thrive when organizations ensure equity in their talent practices; for example, pay, promotion and performance management.
- 6. Programs that support women's unique needs**
Women thrive when their unique health and financial needs are supported.

Najla Najm, Career Business Leader, Mercer Saudi Arabia

Over the years, we have witnessed the truly remarkable transformation of women in the workforce in Saudi Arabia. The transformation has primarily been driven by an overall focus on educating women, as Saudi Arabia sets the stage for more equal participation, which will prove to be a crucial factor in the success of Vision 2030.

From a global perspective, the Kingdom of Saudi Arabia is part of a wider dialogue taking place in the workforce. This conversation includes the issue of equal pay in North America, the lack of female board representation in Europe and everything in between. At the same time, it is becoming increasingly clear that gender equality and the participation of women in the workforce must be taken into account for growth in business and in society as a whole.

⁶ Mercer. *When Women Thrive, Businesses Thrive*, 2016, available at www.mercer.com/content/dam/mercer/attachments/private/nurture-cycle/WWT-Global-Report-2016.pdf.

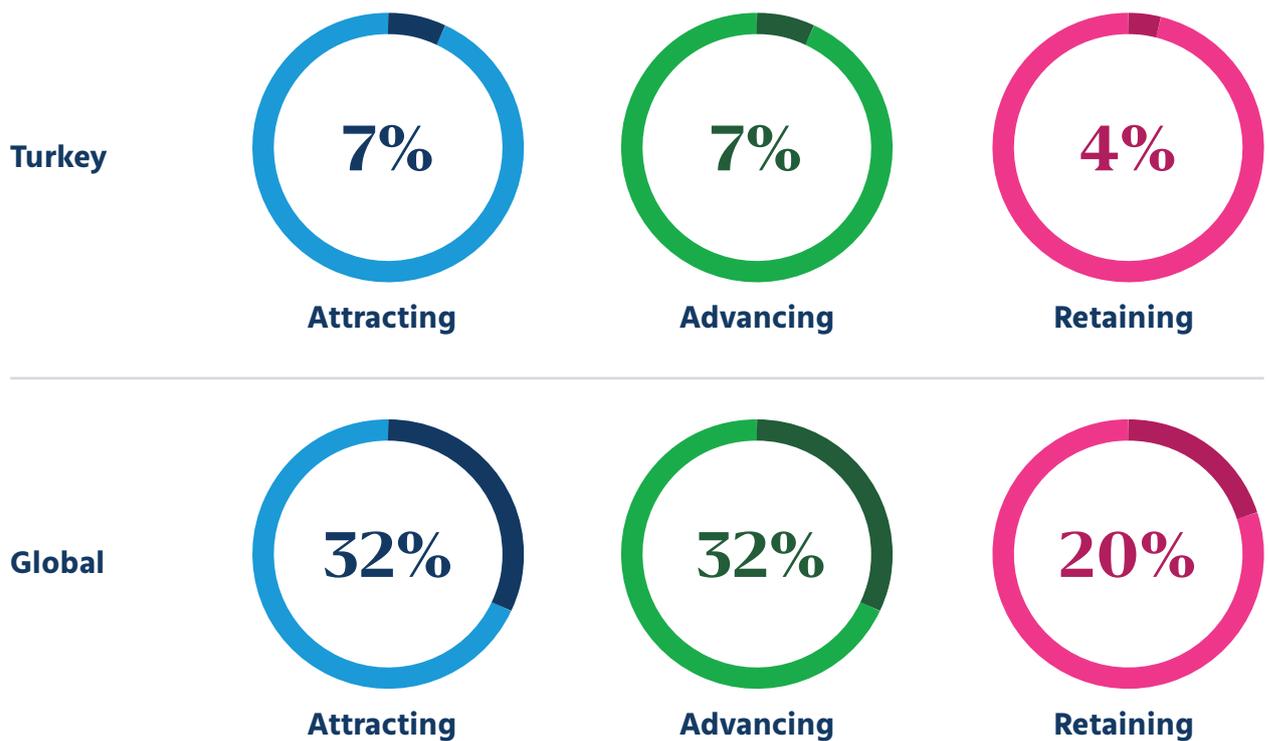
03



Closing the workforce gender gap

03

First the good news: Organisations in Turkey are extremely optimistic about their ability to hire, promote and retain women – even more so than the global average. In fact, less than a quarter of organisations in Turkey say that they are challenged by managing the female talent pool, as it relates to the below:



One reason for such high levels of optimism may be due in part to the high levels of unemployment (nearly 14%7) in Turkey when the survey was fielded. While such optimism is positive, parity in talent flows in Turkey is still not a reality for all organisations across the country. That is, the hiring, advancement and turnover rates for women in the country, in general, are less favourable than for men.

Mapping the ILM⁸

Every organisation operates an “internal labour market” (ILM). People are selected, learn and develop, perform, advance, and choose to stay or leave in response to the practices and circumstances they experience.

An organisation's ILM dynamics constantly shape its workforce. Ideally, those dynamics are creating the workforce that best meets the business needs of the enterprise, including D&I. A succinct way of representing key D&I dynamics is an ILM map. Such a map is a “system at a glance” visualisation of a workforce. A map arrays a workforce by career levels, each having different scopes of responsibility, authority and compensation. An ILM map also displays fundamentally important aspects of talent flows — specifically, the entry and exit of talent by career level and the rates of advancement from lower to higher levels. Visualising this information by gender can deliver valuable insights.

Examples of insights available from ILM maps include:

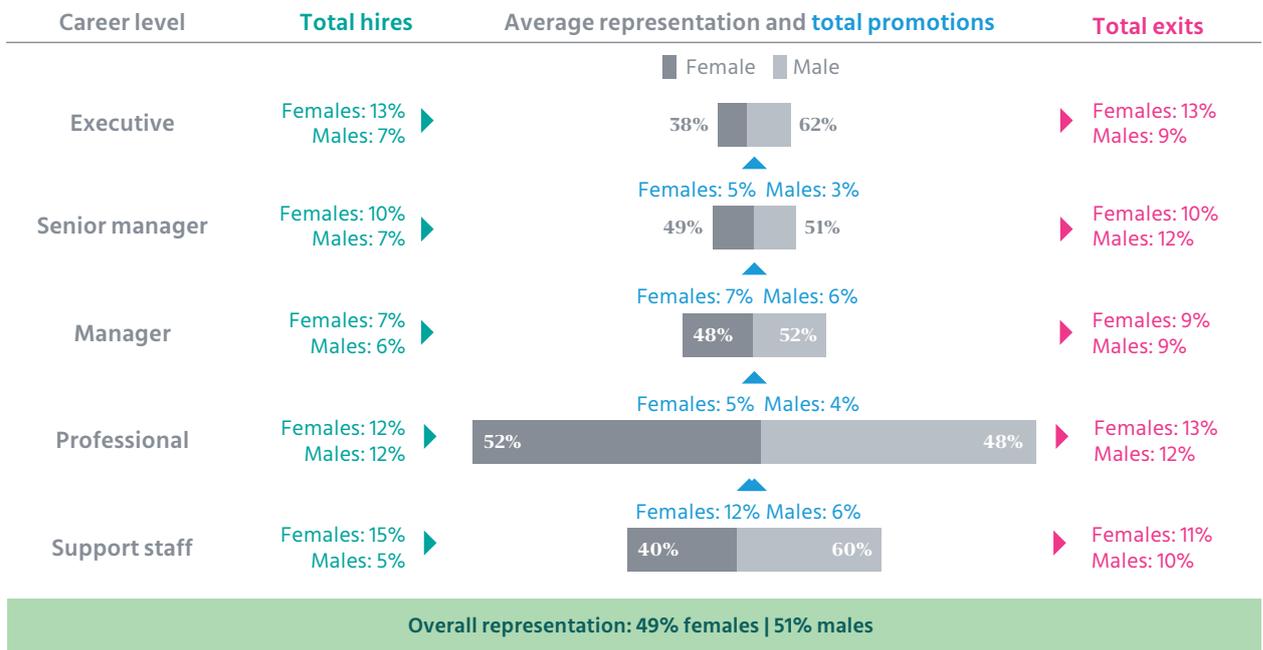
- **Balance — or imbalance** — of representation of women and men by career level.
- The extent to which an organisation “**buys**” its talent, via hiring, or “**builds**” its talent, via promotion, into higher career levels. Talent strategies that emphasize one over the other can play out in ways that affect gender equality.
- The presence of “choke points,” that is, bottlenecks where rates of advancement into a higher level shrink precipitously. **Choke points** can occur that disproportionately affect one gender, such as when the chances of promotion for women falls below that of men.
- **Unwanted differences** in talent losses by gender.

ILM maps help track change over time, both to mark progress and to forecast future workforce composition; for example, what will gender representation be five to 10 years from now given current rates of hiring, promotion and turnover? The maps also are the starting point for next-step investigation into why unwanted gender differences exist, in order to identify where and what interventions are needed.

⁸ Nalbantian HR, Guzzo R, Kieffer D, Doherty J. *Play to Your Strengths: Managing Your Internal Labor Markets for Lasting Competitive Advantage*, McGraw-Hill, 2003.

Internal labor market talent flows for an average global organization

Average Turkish Organisation N=21, Female Representation



When Women Thrive 2020 Survey, conducted between September 23 and November 22, 2019. Section 9: Internal Labour Market (ILM) Data – Workforce Data by Gender & Age: Please provide aggregated data, by gender and age group, regarding your workforce during the most recently completed fiscal year or other 12-month period (n=21).

While the data presented above of the ILM for women is overwhelmingly positive, it is important to note that it is based on a small sample size of 21 organisations. These organisations are not an accurate representation of the full range of survey respondents (n=68), or the entirety of the Turkish workforce. Rather they represent a small snapshot of a select group of companies that have access to relevant D&I data and are actively working to improve the hiring, advancement and retention of female employees.

In Turkey, ILM data of select organizations, show that organisations are better than the global average at bringing women into their talent pipelines at all levels (49% in Turkey vs. 40% globally), except at the support staff level. This marks a tremendous improvement of 17 percentage points for overall representation from the country’s 2016 ILM data. Of particular note is a jump of 19 percentage points in the amount of women represented at the senior manager level. Equally impressive: The professional, manager and senior manager levels are all close to or at parity.

Female hiring rates are favourable or comparable to those for males across all career levels. At the support level, we see a tripling of the hiring rate for women vs. men, while the hiring rate for women at the executive level is almost double that for men. This shows a continuation of the trend we saw in 2016.

Promotion rates are favourable for women at all levels, especially at the support staff level where women advance double the rate of men.

Turnover rates for women are higher at the lower levels (support and professional) and at the executive level. This is an improvement from 2016, when turnover rates were higher for women at all levels except the executive level. Nevertheless, the data shows that retention of women is the most significant challenge facing Turkish organisations despite their optimistic outlook. The key will be unlocking the reason why.



Gender gap in perspective: World Economic Forum 2020 report highlights

According to the World Economic Forum's latest research, the *Global Gender Gap 2020* report,¹¹ it will take the Middle East and North Africa region approximately 150 years to close the gender gap at the current rate of progress. Although this may seem dire, it is 15 years sooner than predictions in the 2019 report.

The research, which looked at 19 countries in the region, found that labor markets in MENA are generally characterized by low female participation and discrimination against women. For women who do work, the report finds that "the estimated earned income of women is, on average, 28% of what men earn."

There is a bright spot, however. The educational gender gap in MENA is extremely narrow, and the region has nearly closed the health gender gap.

Pushing for gender parity

Achieving gender parity in talent flows and improving female representation is the goal for all organisations – not only those more forward-thinking organisations that participated in our research. And, while it's possible, it won't be easy, especially for those just getting started.

Why? Because an organisation committed to reaching gender parity in the next decade, for example, simply isn't going to get there merely by doing what it has been doing. Discouraging? Yes, absolutely, as so many organisations have taken significant steps to progress this goal. The maths indicate that reaching gender parity will require a systematic over-indexing of women over men in hiring, advancement and retention.

This is likely not a palatable or realistic game plan for the vast majority of organisations.

Those organisations that are prepared to make bold moves, such as over-indexing, should be ready for significant challenges. Leaders need to be deeply and uniformly committed, transparent about goals, and candidly ready to address the inevitable question from male employees: What about us?

What's more, an organisation's practices, programmes and policies all need to be carefully aligned to support the effort and help ensure an inclusive environment where there isn't just equal representation, but also equality of opportunity, experience and pay at all levels.

The bottom line? Changing the maths isn't going to be easy.

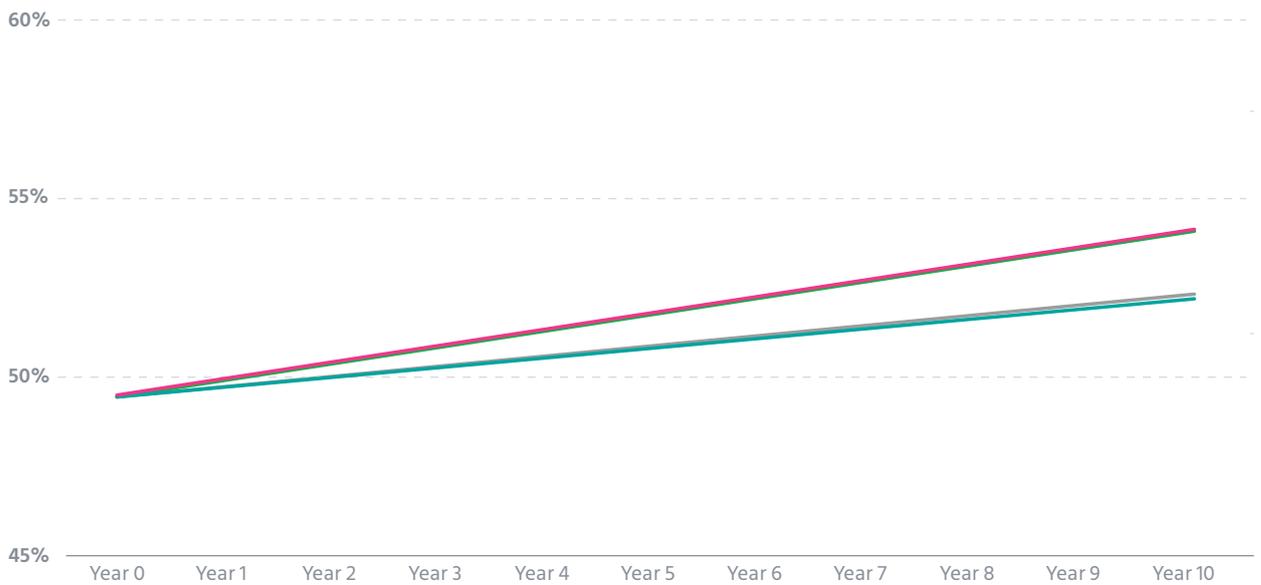
¹¹ World Economic Forum. *Global Gender Gap Report 2020*, available at http://www3.weforum.org/docs/WEF_GGGR_2020.pdf.

Where will women be in 10 years?
 Average Turkish Organization N=21
 Female Representation

Current and projected female representation % (professionals and above)	Current period		5-year projection		10-year projection	
	Baseline scenario	With all changes	Baseline scenario	With all changes	Baseline scenario	With all changes
	50%	50%	51%	52%	53%	55%

- Baseline scenario (i.e, no changes to flows)
- With adjusted hiring
- With adjusted promotions
- With adjusted turnover
- With simultaneous adjustments (all flows)

Even with comparable/favorable talent flows, projections indicate it will take 10 years to increase female representation by just 3%



Note: Not all colored lines may show as a result of overlapping estimates.

03 Get real. Get smart.

Get real.

Regardless of what stage an organisation is at, Mercer has defined active measures it can take to advance a diverse workforce and inclusive culture.

Get smart.

To make true and lasting progress, actions must be *specific, measurable, actionable, relevant* and time-based.

Here's how to put the findings and learnings from this section into action:





Advocacy by itself won't result in gender parity. If we want to effectively tackle gender inequality in the MENA region, we must first measure where we are today and then connect data and advocacy.

— Seza Vaziri,
Founder of Kandoo¹²



03



¹² Kandoo is an online portal that acts as an aggregator to provide access for diversity leaders to drive gender balance. It offers events, news, resources (books, articles, studies and reports, and podcasts) on the topic of gender equality in the Middle East. For more information, please visit kandoo.me.

Walk the talk

Based on our research, organisations across Turkey in virtually every sector, are actively laying the building blocks for advancements in a diverse workforce and inclusive culture. It's worth repeating: Improving workforce diversity and inclusion is "high" or "very high" on the agenda of almost all (94%) the organisations surveyed in the region.

So much positive intent and good work — yet, when we dive into the details, only 15% of organisations in the country have staff dedicated exclusively to D&I, compared to 35% globally. Why is that?

The research demonstrates that, though progress has been made with specific programmes, policies and practices, these alone are not enough to drive real and lasting progress. Further advances require addressing important structural issues: the absence of a comprehensive D&I strategy, a shortage of metrics for adequately measuring achievements, and the need for accountable employees — especially middle and frontline managers at the core of the organisation.

Arguably most important, a diverse workforce and inclusive culture is still not widely viewed as a vital part of the business strategy of an organisation. Making these changes will be both uncomfortable and disruptive, but organizations that want to be relevant and thrive, must acknowledge and adapt to the changing environment.

This translates to moving beyond pledges and onto action and accountability. It will require taking an honest look at data to understand where there are gaps in opportunity, experience and pay. Only then can an organisation fully own D&I and walk the talk, through the business principles they know best: cogent strategy and bottom-line results.

Game plan required

There's what we say we will do. And then there's actually what we do. Ideally, they match up; too often, they don't. It's called the "say-do" gap, and we were surprised to discover a number of them in our latest research.

Although more than two-thirds (68%) of organisations in Turkey report that their senior executives are actively engaged in D&I, we found minimal evidence-based, strategic planning to back up or propel a concrete forward strategy. Optimism and confidence about improvements in representation, hiring, promotions, retention and pay equity also may not appear to be backed up by an uptick in using data analytics to drive decision-making and measure outcomes.



We are born from a vision, which is to create a better everyday life for people, and every day, in every team, you will really see our vision as a living reality. This includes making sure, structurally, that diversity and inclusion is built into our business priorities. That is why we have gender equality targets at the same level as our financial and growth goals.

— Olivia Ross-Wilson,
Chief Communications Officer, Ingka Group (IKEA)





In recent years, important steps have been taken regarding gender equality. Large companies are the lead for Turkey’s economy and with the awareness of gender equality’s positive effect to their companies and to economy as a whole they are implementing model studies. This change will happen when companies at all levels truly embrace this. Therefore, we have a long way to go in Turkey. Every institution and person needs to identify and assign its role in change. It is not possible to change others without changing itself, without compensating for its shortcomings. In this sense, we need to start from ourselves in order for change to be possible.

— Candan Ereser,
Unilever HR Business Partner - Finance & IT & Legal & HR – NAMETRUB Diversity & Inclusion Lead



What organizations say	What organizations do	Why the gap matters
<p>94% of organisations in Turkey say they’re focused on improving D&I</p> 	<p>Only 34% of organizations report having a documented, multi-year D&I strategy</p> <p>63% of organisations – higher than the global average of 50% – set quantitative goals or targets for D&I outcomes such as representation, engagement and pay equity</p>	<p>While an impressive amount of organisations have set targets, little more a third are aligned with a D&I strategy. This makes it difficult to ensure the most impactful steps are taken to drive process improvements.</p>
<p>68% of organisations in the country say senior executives are actively engaged in D&I, similar to the global average of 66%</p> 	<p>Only 15% of organizations have staff dedicated to D&I, of which 24% have a chief diversity or inclusion officer; of those, only 31% report to the CEO</p>	<p>While senior leadership recognises the importance of D&I – and are engaged – few organisations have put in place the staff necessary to implement D&I programmes</p>

04

Accountability in perspective

Jill Zimmerman, Global Chief Talent & Inclusion Officer, Mercer

Many years ago, at a different company, I was leading our talent acquisition team. We set out to diversify our workforce at all levels by changing our sourcing, recruiting and hiring strategy. And we were successful. Fast forward two years, however, and most of that diverse talent was leaving that company. Why?

It turned out we hadn't been looking at the whole picture. We did focus on diversifying our hiring at all levels, but we did not also look at the balance of our promotions or retention at all levels. Often companies look solely at representation instead of the entire pipeline of talent: the inflow, upflow and outflow at all levels. This can be misleading, as it was in the story shared above, where the focus was solely on the inflow of diverse talent.

When I came on board at Mercer, I had the data available to take a more comprehensive, data-driven approach to accurately measure and diversify our workforce — using our ILM Analysis to build a new quarterly dashboard for leaders. Our ILM Analysis shows the entire makeup of our workforce by level. We used that ILM data and analysis to create our data-driven diversity strategy — to identify common chokepoints where diversity would fall off, to pinpoint the key types of roles that tended to lead to advancement, to

understand the composition of our workforce and to recognize opportunities for improvement.

Organizational leaders receive D&I dashboards that include the inflow, movement and outflow of talent in different groupings for each level of the organization. The dashboards also break down key metrics, such as which type of roles are likely to lead to advancement to higher-level roles. In our case, to be in a people-manager role or client-revenue-generating role was to advance your career. In other companies I have worked in, to be in a P&L role was to advance your career.



The data can be misleading if you simply look at representation at a certain job level; it is important to also look at the diverse representation in specific roles that lead to advancement.

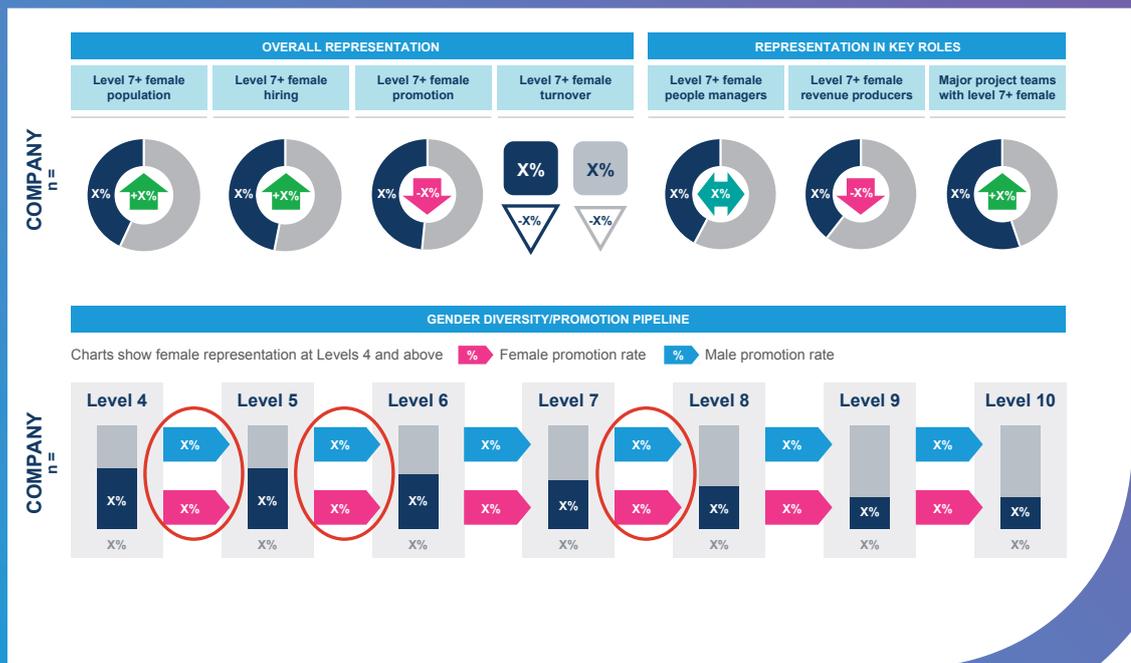


Working with corporate HR, its business leadership teams and HR business partners, our leaders review their quarterly dashboard and use the data (the hiring, advancement, retention and representation in key roles) to identify specific data-driven actions

(up to three) that will make a difference in the composition of the workforce. Those actions are then communicated back to the organization, and leaders are held accountable by our CEO for moving the needle on them. We use that same dashboard quarterly to track progress. It's measured. It's shared.

And it's transparent. Once you have a dashboard in place, establish the transparency and accountability to track not just the data but real, ongoing actions and outcomes that are owned by the business — and you will be well on your way.

Gender diversity dashboard (YTD level 7+ women)



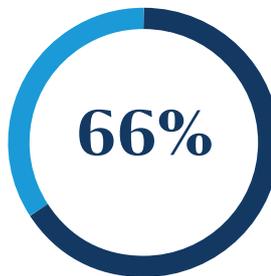


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Black box

Because D&I often remains outside the purview of business performance, many organisations may be tempted to not invest in or disclose D&I commitments and data. From our global research, however, we have seen how greater public disclosure and transparency can accelerate change and advance accountability.

Here's what the research shows:



66% of organisations in Turkey say they publicly document commitments to gender equality, as compared to 50% globally.



More than half of organisations (63%) in Turkey actively seek external recognition for D&I efforts, more than 20 percentage points higher than the global average (42%).



But less than half (48%) of organisations in Turkey report they make no public disclosures, compared to 45% globally.

For those that do disclose data, women in senior leadership (51% in Turkey vs. 46% globally) tops the list of data shared, followed by pay equity disclosures (23% in Turkey vs. 27% globally). Beyond gender, organisations are less likely to publicise their D&I progress — only 3% disclose representation of historically underrepresented employee groups, as compared to 11% globally.

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Take it from the top

In organisations where a diverse workforce and inclusive culture is flourishing, there's usually only one way to look: Up! Senior leaders and board members are key drivers of D&I outcomes, particularly as they relate to demonstrating passionate leadership, personal commitment and perseverance.

Who's getting onboard?

Direct involvement in D&I initiatives and programs

Board

In Turkey, **59%** of organisations cite board engagement compared to **57%** globally. Interestingly, this is down in Turkey from 2016 by nearly 20 percentage points (77%). One reason may be that more Turkish organisations participated in our latest research compared to 2016, as compared to multinational companies, many of which may not yet have formalised board involvement.



Senior executives

In Turkey, **68%** of organisations report that senior executives are actively engaged in D&I initiatives and programmes – similar to the global average of **66%**. However, as with board involvement, this has dropped by more than 10 percentage points from 2016 (77%) – likely for the same reason.



Where senior executives in Turkey are engaged in D&I activities, they are helping to support cultural transformation in multiple ways – albeit at a lower rate than globally:

- Sponsoring or regularly meeting with various employee resource/affinity groups (44% Turkey vs. 57% globally)
- Participating as members of internal diversity councils (42% Turkey vs. 43% globally)
- Publicly positioning D&I as a business imperative, internally and externally (40% Turkey vs. 66% globally)
- Directing the implementation of diversity metrics and programmes (38% Turkey vs. 57% globally)

At the same time, senior leaders could do more in other areas to demonstrate their commitment. One powerful way is by acting as personal sponsors or mentors to individuals. Notably, just 29% of executives in Turkey are taking on this role, as compared to 38% globally. Another opportunity is for senior leaders to not only serve on, but to lead, internal diversity councils. Currently, only 29% of senior leaders in Turkey do so, as compared to 32% globally.



We cannot all succeed when half of us are held back. I strongly believe that the empowerment of women and the diversity of cultures and backgrounds in MENA region foster innovation and creativity, which is one of the cornerstones of success.

— Amira Sadek,
Multinational Client Manager, Mercer Middle East



About targets

In Turkey, the data shows that organisations are holding their senior leaders accountable for D&I outcomes.



Nearly half (47%) of individual leaders in the country have formal quantitative goals or targets tied to D&I outcomes, significantly higher than the global average (32%).



One reason for the higher score may be the fact that, as reported earlier, more organisations in Turkey (66%) make public commitments to gender equality vs. global organisations (50%).

However, there is room for improvement given that only 2% of organisations in Turkey set executive compensation targets tied to D&I outcomes – much lower than the global average of 17%.

These findings may be linked to positive strides toward adopting gender-balanced representation quotas or targets. A lack of goals and targets can stifle progress, so organisations should consider meaningful alternatives. For example, instead of measuring gains solely in terms of representation, consider measuring the impact of policies, programmes and practices that improve the overall equality of opportunity, experience and pay — as we outline in in the next section, **Hardwire it!**

The new normal

Cultural change that goes beyond policy or programmatic changes to support equality of opportunity and treatment across the board will also require a change-management effort led from the top.

Clearly, new competencies are needed for today's changing and challenging environment. Leaders must be able to connect the dots between social issues and business solutions and recognise that the two need not be mutually exclusive. They must take a holistic view of the needs and desires of all stakeholders in order to uncover market opportunities, attract customers and open the door to innovative ideas.

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Hardwire it!

Despite the advances we have seen so far, some of the heaviest lifting lies ahead. To advance, women need the right roles, opportunities, pay, benefits, flexibility and organisational environment that is most predictive of success.

How do we get there?

In this section, we turn our focus back to the six Ps — specifically programmes, processes and proof — and how we can hardwire changes into the organisation that ultimately support a more diverse and inclusive workforce culture. It starts with better engaging the middle and frontline managers (both men and women) who shape and influence the daily life of employees — and critically, can play a pivotal role in connecting them with the right resources and experiences within the organisation. We must also recognise that women have unique needs with regards to health, financial wellness and caregiving that organisations can and should support.

Managers: Making a difference

Our research shows that, in increasing numbers, leaders are getting engaged with organisational efforts to improve D&I outcomes. But the momentum can often stop there, reaching the middle, slowly, and not spreading further throughout the organisation.

In some cases, changes in policy and processes — along with setting representation targets — have curtailed progress when the underlying culture remains unchanged. Organisations need to engage middle and frontline managers who are critical to administering D&I practices, managing people across the talent lifecycle, and setting the culture, to ensure that inclusive values are adopted as corporate ones.

Who's getting onboard?

Direct involvement in D&I initiatives and programs

Middle managers

53% in Turkey, equal to the global average



Frontline managers

46% in Turkey, also equal to the global average



There are also opportunities in Turkey to introduce more managerial training to support employees in two key areas. We see that less than a third of organisations (28%) surveyed in Turkey train their managers to support employees through parental leave and return-to-work processes.

While low, this percentage has more than doubled since 2016 (13%), but remains lower than the global average of 33%. Another opportunity: training managers to support their employees' use of flexible work options — something only 24% of organisations in Turkey currently do, compared to 34% globally.

Accelerating culture change

Angela Berg, Global Diversity & Inclusion Consulting Leader, Mercer

People don't leave companies, they leave managers. 

A broad range of data supports this often-repeated statement, but interestingly, managers are often one of the later stops organizations make when they are on a journey of cultural transformation. Though hardwiring programs, policies and processes are a critical part of the change process, managers are ultimately on point to implement them in the workplace through everyday interactions with employees — and can have critical impact on D&I outcomes.

Parental leave is a good example of how this plays out. Over the past several years, many organizations have adopted generous parental leave policies that provide time off for both parents. However, uptake of the benefit is often low. Why? The missing piece is training managers to support the policy. Often, managers simply don't understand how the policy works, so they are unable to guide their employees on how to apply it and how it would impact pay, benefits and so on. In other cases, managers fail to receive support or guidance on how to staff while employees are out on leave. In both cases, the net result is managers who aren't able to actively support the transition to leave — and employees who are reluctant to take advantage of the benefit.

As organizations work to ensure equality of opportunity, experience and pay, consider the role of the manager as an accelerator and provide the right training and support to ensure that the manager is fully equipped to play that role. 

Train managers to effectively conduct pay conversations and to give employees (all employees — not just women!) the confidence that they are paid equitably. Ensure that managers are prepared to connect employees to the many benefits and programs available to support their health and well-being. Actively coach managers on how to hire, train, mentor and provide feedback in an unbiased way.

Culture change is hard and takes time, but managers can be an organization's greatest asset to enable transformation.

Men: in the middle

Men are essential to the pursuit of gender parity. Not only does it need to be said, but it also needs to be reflected in what we do. Necessary actions range from listening to men's perspectives to engaging men as change agents, managers and partners in developing and embedding solutions. As integral as men are to successfully achieving D&I goals, sadly, they are not participating in the prevailing dialogue: D&I conferences are still composed of mostly women.

The research also supports men's lack of involvement. In Turkey, organisations report that only 41% of men – as compared to the global average of 48% – are actively involved or engaged in D&I programmes and initiatives.

More open communication is needed to address any reluctance and/or uncertainty about how to address or achieve the aims of D&I. This is particularly true in those situations when outcomes are viewed as zero-sum, such as in low-growth industries or situations involving quota schemes.

Men's roles in perspective: Ray Arata, JD, and Ed Gurowitz, PhD, Co-Founders and Partners, Inclusionary Leadership Group

As we move to close the gender gap, we shouldn't be afraid to expect more and ask more from men. Once they are aware of inequality at work, men want to fix it. They want to be educated on what it means to be vulnerable and authentic and human, in a way that isn't charged or laying blame at their feet. And they want to make positive changes that drive equality. Most men are simply looking for good leaders to show them how.

As we look at these data, one thing is clear: It's men who have to step forward to remove the remaining organizational barriers to D&I, because it's men who put those barriers there — however unintentionally — and it's men who still control those levers of power.

When confronted with the reality of inequity — not blamed, but made aware of it — men will start to change their behaviors and advocate for change. Men want to have these conversations, so leaders should not shy away from them. Male leaders, especially, should take the opportunity to lead by example. Focus on vulnerability and accountability, which we define as taking full responsibility for words, choices and actions and their consequences, whether intended or not.

Once men understand that their privilege is an accident of birth, they can recognize it as a powerful tool. In our practice, we ask them, 'You've got privilege, why not use it for good? We're not asking you to give it up. We're asking you to use it.' The response is overwhelmingly positive.

Spotlight: Parental Leave Matters, Mercer (2018)

Increasingly, large organisations are offering paternity leave to new fathers, yet relatively few are taking it up. Research by Mercer finds that though 80% of large global employers do explicitly offer paternity leave (paid or unpaid), however at least 23% of men in G7 countries, like the U.S. are declining to take it.⁹

This is extraordinarily self-defeating. A benefit that is most likely to be taken up by just half of the workforce helps to ingrain bias and skew the playing field between men and women in the workplace. Not surprisingly, Mercer research found that parental leave is proving to be the key to addressing the gender pay gap. Because working mothers are still doing the bulk of parenting work at home, their upward mobility in the workplace is hindered and they fall behind.



By allowing men to help shoulder responsibility from the start, we can help equalize the effects of maternity leave and motherhood on the development, compensation and overall equality of women in organizations.



In addition, men, their partners, their children and their organisations are all more likely to thrive if men spend time with their children in the period following their arrival.

Father-and-baby bonding during leave helps a dad's ability to care for children in the long-term and become a more involved parent. It also has a positive impact on men's relationships with their spouses or partners. It's clearly beneficial for women, too, who see a decline in overall levels of post-partum depression and sick leave and an increase in well-being when their male partners take parental leave. Plus, paternity leave helps to mitigate the "motherhood penalty" when male spouses take leave. A recent study found women's salaries on average are approximately 7% higher for every month of leave their partners take.

Critically, organisations may reap the highest rewards by encouraging men to take parental leave. Between 89% and 99% of employers say leave has no negative effects on productivity, profitability, turnover and morale. And according to studies in both Scotland and the U.S., fathers and parents of both sexes who took parental leave were more likely to stay with their organisations.

In order to put principles into actions, however, senior male managers have to lead by example if they want their employees to follow.

⁹ Mercer. "Want to improve gender equality at work? Help men take parental leave," Mercer, 2018, available at www.mercer.com/our-thinking/want-to-improve-gender-equality-at-work-help-men-take-parental-leave.html.

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Pay equity progress

We've seen tremendous progress globally in pay equity — another bright spot, because an increasing number of organisations are adopting more disciplined methods to ensure its achievement. We know from the research and from our work with hundreds of clients globally that these organisations do better from a talent-flow and representation perspective.

In Turkey, we see this same trend with an impressive 81% percent of organisations – compared to 74% globally – reporting that pay equity is part of their compensation strategy.

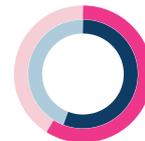
Our research also shows that ensuring fair pay relative to contributions is the objective of analysing pay equity for 91% of organisations in Turkey, while 80% focus on analysing pay equity to attract or retain the best talent, as compared with 85% and 68% globally. Legal compliance is not a driving factor (11% Turkey vs. 25% globally).

These results show that organisations are increasingly seeing pay equity as an important human capital issue. However, there is still need of improvement for more organisations to focus on pay equity and more still to put in place efforts to close the gap.

What organizations are doing

Methodology

Importantly, conducting pay-equity analysis using a robust statistical approach (the gold standard) is trending, with **59%** of organisations doing so in Turkey, similar to the global average of **56%**



Scope

87% of organisations in Turkey that analyse pay report that if an employee is eligible for an increase, the adjustments typically address both base and variable pay – slightly higher than the global average of **84%** and an impressive 20 percentage points higher than the Turkish average (67%) in 2016



Remediation

43% of organisations in Turkey have a formalised process for remediating pay inequities, only one percentage point lower than the global average of **44%**



Oversight

Not surprising given the high levels of senior engagement in the country, HR and the C-suite are actively engaged in pay-equity efforts; **70%** of organisations in Turkey report engagement from the C-suite compared to **51%** globally. More organisations in Turkey (49%) also engage their board in fair pay discussions vs. 38% globally (we expect boards to make D&I an increasing priority and become even more involved in oversight)



Also note that, although pay equity tends to be framed as a gender issue, it's not only women whose pay may need to be remedied. Men who are underpaid can benefit from a corrective adjustment as well.

Pay equity in perspective

Brian Levine, PhD, Pay Equity Leader, Strategy & Analytics, Mercer

Pay equity was once just focused on ensuring that people in the same job and in the same role were paid equivalently. We now see a greater realization that equity is not simply about pay within a role. Organizations need to provide equitable opportunity for employees to advance, and to grow, and to earn more through that advancement. This shift is reflective of an increased pressure on organizations to disclose their work but also continued priority by organizations to improve diversity and ensure access to the best talent.

Pay equity is a foundation. Our past research has found that good practices related to pay equity translate into good, effective, fair processes across the board by focusing managers on equity — and so they are very effective in helping organizations build D&I throughout the hierarchy. This makes pay equity an ideal place for organizations to start when they are trying to effect broad change.

There is only going to be increased demand for organizations to be transparent about pay equity and related efforts.



Organizations need to look deeply and broadly at the issue to respond and drive related successes — analysis done right will be insightful and actionable, revealing short- and longer-term actions to close gaps and, yes, to support the right reporting when the time comes.



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Getting ahead

In addition to continuing to work toward pay parity, organisations need to commit more widely to equality of opportunity. This enables women and other underrepresented groups to get the career advancement and promotions that can help make all levels and branches of an organisation more diverse.

Our global research and consulting experience show that women in people-manager roles with P&L responsibility and experience in different parts of an organisation are more likely to advance. These findings are consistent with our 2016 global report, which found, among other things, that having more women in P&L roles is strongly linked to greater gender diversity throughout the organisation. The research shows that there is no doubt the same holds true in Turkey, as well.

The vast majority of organisations in the country report that women in their organisations have equal access to

the specific roles or positions that are more likely to lead to advancement into senior management or leadership positions. Encouragingly, organisations are also tracking most metrics at higher rates than their global counterparts.

While organisations in the region report a higher prevalence of tracking most metrics by gender than global organisations, there remains room for improvement. Only 27% review performance ratings by gender, similar to the global average of 28%, but down from 57% in 2016. This may be due to the higher number of Turkish organizations in our most recent research compared to the 2016 report.

Slightly more hopeful, 64% track internal mobility by gender vs. 41% globally. Such data can help organisations truly understand the root causes of the deficiency in female advancement.

What organizations say	What organizations do	Why the gap matters
<p>87% of organisations in the country report that women have equal access to roles that lead to advancement into leadership positions – higher than the global average of 79%</p> 	<p>79% track gender representation by career level, and 73% track hiring, promotion and exits by gender – higher than the global average on both counts (64% and 58%, respectively)</p>	<p>While high levels of optimism about advancement is encouraging, it's vital that organisations have access to reliable data to identify where additional improvements are needed</p>
<p>93% of organisations say women are equally likely as men to move across business units and/or geographies, as compared to the global average of 71%</p> 	<p>42% of organisations review engagement survey responses by gender, as compared to 44% globally</p>	
<p>76% say women are equally represented in people-manager roles; 70% say they are equally represented in P&L roles, as compared to 52% and 44% globally, respectively</p> 		

Mobility in perspective

Rick Guzzo, PhD, Co-Founder, Workforce Sciences Institute, Mercer

The innovators in equity in career development and advancement are organizations that have two characteristics. The first is that they go public with their efforts — success or failure — not just to the board or the executive team but also to their stakeholders, including employees, investors and customers.

The other is that they don't ever do just one single thing. They try multiple things. They understand that to move the needle, they cannot take only one shot at the problem and that it will take time and patience before they see tangible progress. To maintain momentum and achieve change that sticks, they'll need to put several plays into the field at once. Deploying interventions in two or three areas will have more impact than an organization trying just one thing.



For organizations just getting started, our advice is to look carefully at what's happening in your organization in terms of equal access for men and women.



Take note of who has access to the springboard jobs that accelerate the capabilities of individuals and their potential to move up. Determine whether you are keeping the right people and how that is different by gender. And closely examine things like pay equity and fair opportunity. Those are table stakes that must be met for the employer to be credible.

More flexibility, please

Clear links exist between the comparatively small number of women in key organisational roles and the lack of flexible working arrangements in many organisations, which often impedes upward mobility.

An important area for organisations to prioritise in order to hardwire D&I into their cultures is flexible working arrangements. Employees across demographic groups value opportunities to work flexibly and require that organisations respect their desire to balance work with other interests and responsibilities.

Ultimately, we need all organisations to respond to employee demands for flex-time and family leave, which are significant to not only millennials and Gen Z, but also to experienced workers, who frequently have care responsibilities.¹⁰

Managing performance in a flexible workforce

One of the biggest challenges facing employers is managing performance in a flexible workplace where many workers are struggling with competing demands.

The majority of employers aren't presently meeting flexible workforce demand and, "where flexible policies exist, data shows they are generally two-dimensional, limited to where and when people can work."¹¹

Organisations should look at workplace flexibility across multiple dimensions: "When work is done, where work is done, what work is done, how work is performed and rewarded."¹² Research shows that a well-implemented workplace flexibility framework has a clear link to improved physical and mental well-being for employees.¹³

How much is flexibility valued? A 2016 report by My Family Care and Hydrogen — including survey responses from more than 2,300 employees and more than 440 employers in the U.K., Europe, Middle East and Asia Pacific — found that 53% of people would rather work flexibly than receive a 5% salary increase; 45% of those would sacrifice pay raises of 10% to have flexible working opportunities.¹⁴

The difficulties in acting on these imperatives are clear from the data: Globally, two-thirds of organisations report that they offer a variety of flexible work arrangements (66%), but only 45% of organisations say that part-time employees have the same opportunities to advance as full-time employees, and only 44% say they value employees who work remotely equally.

In Turkey, somewhat fewer organisations than globally (58% in Turkey vs. 66% globally) report they offer a variety of flexible working arrangements. However, the acceptance of those using the benefits has increased nearly 15 percentage points in Turkey (46%) since 2016, with 60% of organisations in 2020 reporting that their culture is equally supportive of men taking family leave, time off and flexible working options as it is of women — although this remains lower than the global average of 67%. While this is a trend in the right direction, challenges remain. Only 51% of organisations say part-time employees have the same opportunities to advance as full-time employees and just 43% say they value employees who work remotely equally.

¹⁰ Mercer. *Are You Age-Ready?*, 2019, available at www.mercer.com/content/dam/mercer/attachments/private/gl-2019-6009756-mn-experienced-worker-POV-mercer.pdf.

¹¹ My Family Care, Hydrogen. *The Competitive Advantage of Flexible and Family Friendly Working*, 2016, available at www.hydrogengroup.com/flexible-working-report.

¹² Mercer. *Are You Age-Ready?*, 2019.

¹³ *ibid.*

¹⁴ *ibid.*



Flexibility is a key issue for the modern, multigenerational workforce. People of all ages — including experienced workers — are willing to trade compensation for flexibility. Developing a culture of acceptance for the use of this benefit will remove a considerable impediment for career development and advancement. Effective training for managers — in combination with modeling desired behaviors — will drive acceptance and use.

— Ilya Bonic, President,
Career, and Head of Strategy, Mercer



The good news is that in Turkey two-thirds of organisations (66%) say that employees who take family leave, time off or flexible working options advance at the same rate as their peers, compared to 61% globally. Such a high level of support for flexible working is good news for workers in the country. However, this optimism is hard to verify and often conflicts with anecdotal stories from workers.



Yvonne Sonsino, Global Co-Leader, Next Stage, Mercer

Flexible work is finally moving in the right direction. We can tell by looking at one critical question in this research: "We value people's contribution according to results, not number of hours worked." The results here show us moving from an old model of "presenteeism" where contribution was measured by hours in the workplace to new ways of measuring effort and impact. This is an important shift that will make possible a more flexible global work environment, which will be particularly impactful for both women and older workers.

In years past, managers did not trust teams to work remotely or at different hours and still get their work done. This lack of trust correlated with two factors: a low level of familiarity with flex-working and a difficulty in measuring results. The more comfortable organizations become with measuring success and results, the more likely they will be to stop measuring output by punches on the time clock, the more familiar they will become with flexibility and the more it will flourish.

The benefits of flexibility are clear. Workers at every age, of every gender and in every region are demanding it. They want to better balance the needs of family units, manage their own career goals, attend to caring responsibilities or education, and fit their lifestyles around work. At the same time, the labor pool is shrinking and changing. People are living longer. Birth rates are lower.



Flexibility is an economic imperative as organizations try to attract and keep their labor force. Organizations must become more flexible to stay competitive.



Spotlight: The rise of experienced workers

Ageism is one of the last D&I frontiers, and is still a bit of a blind spot for many organizations, but flexibility can help us make inroads,

— Yvonne Sonsino, Partner, Mercer

The one labor pool that is actually growing in most developed nations is that of older, more experienced workers. Nine out of 10 workers over 50 years old tell us they also want to work differently in the future, but they need a lot more encouragement and support from leadership and line managers to take advantage of flexible work options. It's very early days still, but if these trends hold true, and with the shifting attitudes of managers and leaders, the growth of flexibility will prove to be critical in engaging the experienced workforce.

Employers must be mindful of considerations around experienced workers and the need to ensure that they can also see career mobility. This is likely to involve a review of performance ratings and promotions, as Mercer's systematic review of work with client organizations finds a consistent pattern of experienced workers receiving lower performance ratings and lower promotion rates, on average, than their younger colleagues.²²

Because experienced workers are largely ignored — or misperceived — in strategic workforce plans, organizations are failing to capitalize on the value that workers with decades of experience can deliver.

¹⁵ Mercer. "Are You Age-Ready?" 2019.

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Care beyond career

Though benefits that apply universally can help engage all employees, evidence suggests that programmes targeting women's unique needs can have a powerful impact on gender diversity in the workforce. To date, however, we found a substantial lack of progress among Turkish organisations in addressing the holistic and unique caregiving, health and financial wellness needs of women — which, candidly, was a disappointment in our latest research.

Staying healthy

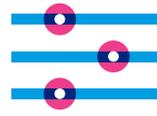
Similar to their counterparts globally, organisations in Turkey are generally more committed to gender-based health initiatives than to financial ones – but there is ample room for improvement in all areas.

30%



of organisations in Turkey track gender-specific health needs, slightly higher than the global average (25%)

32%



of organisations in Turkey – similar to the global average (34%) – offer health programs beyond the core health plan, specific to women's needs (infertility coverage, domestic violence support, breast cancer diagnosis/treatment and menopause)

33%



of organisations provide health education to women, compared to 27% globally

37%



of organisations in Turkey state that women have access to affordable contraception and reproductive care in all geographies – more than 10 percentage points higher than the global average (24%)

36%



of organisations in the country – compared to 23% globally – conduct analyses to identify healthcare needs for late-career workers (both men and women)

36%



of organisations gather information on employees' caregiving needs and obligations (e.g., childcare, elder care) – comparable to the global average of 31%

Health in perspective

Dr. Lorna Friedman, Global Health Leader, Multinational Client Group, Mercer

“Maintaining and accessing health and well-being resources is a significant determinant of whether women stay in the workforce. There are a number of differences between men and women when it comes to health and well-being. Importantly, around the world, women still assume the double burden of being professionals and family caregivers,²³ which reduces their time and resources for healthy behaviors and accessing care.²⁴

Women have unique healthcare needs and are more likely than men to experience a range of health issues. Like men, women suffer from chronic diseases like cardiac illness, but gender bias in treatment protocols leaves them vulnerable to poor outcomes.^{25,26} Not only are women often denied access to quality care, they are also discriminated against in the delivery of this care.²⁷ Gender is undeniably a social determinant of health. Finally,

women face biases that are detrimental to access and outcomes in traditional arenas of reproductive and sexual health.

Cultural stigma and constraints particular to women often also prevent them from seeking and acquiring the mental healthcare they need.²⁸ Women are less likely to use mental health services when they face economic or structural barriers.²⁹ Technology-based solutions can help break down barriers to accessing mental healthcare by providing information and accessible services. New digital platforms and products have the potential to improve access to care by delivering timely, on-demand care anywhere. To ensure that future innovations help erase the stigma associated with seeking sexual, mental and reproductive health assistance, we must make sure that digital platforms are built and influenced by women who understand that stigma.”

¹⁶ OECD. Gender, Institutions and Development Database, 2014.

¹⁷ Centre for Talent Innovation. “The Power of the Purse: Engaging Women Decision Makers for Healthy Outcomes,” 2015 available at https://www.talentinnovation.org/_private/assets/PopHealthcare_ExecSumm-CTI.pdf

¹⁸ Bugiardini R, Ricci B, Cenko E, Vasiljevic Z, Kedev S, et al. “Delayed Care and Mortality Among Women and Men With Myocardial Infarction,” *Journal of the American Heart Association*, Volume 6 Issue 8 (2017).

¹⁹ Greenwood B, Carnahan S, Huang L. “Patient-Physician Gender Concordance and Increased Mortality Among Female Heart Attack Patients,” *Proceedings of the National Academy of Sciences of the United States of America*, Volume 115 Issue 34 (2018), pp. 8569–8574.

²⁰ Chen E, Shofer F, Dean A, Hollander J, Baxt W, Robey J, et al. “Gender Disparity in Analgesic Treatment of Emergency Department Patients with Acute Abdominal Pain,” *Academic Emergency Medicine*, Volume 15 Issue 5 (2008), pp.414–418.

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²² Paula de los Angeles C, Watkins Lewis W, McBain R, Taghi Yasamy M, Aderemi Olukoya A, Morris J. “Use of Mental Health Services by Women in Low and Middle Income Countries,” *Journal of Public Mental Health*, Volume 13 Issue 4 (2014), pp.211–223.

Financially fit

The gender gap is especially notable when financial wellness is concerned. This is true not only in Turkey, but also globally. Only 11% of organisations in the country track financial wellness by gender, similar to the global average of 9%. And only 8% monitor savings and deferral and investment rates by gender – the same as the global average. Many organisations are also missing an opportunity to contribute to women’s financial security — just 5% of organisations in the country offer customized retirement/savings education and training by gender, as compared with 8% globally, and only 38% track the use of available financial resources and tools by gender, although this is significantly higher than the global average of 11%. Greater use of these tools could deliver a big boost in female employees’ financial courage and confidence.

Intersecting health and wealth for women

A recent study found that women in particular have more unpaid responsibilities, such as caring for children and relatives. The demands on their time can be compounded by their multiple roles as both users of healthcare themselves and as “chief medical officers” of their families. In one survey, 77% of women don’t do what they know they should do to stay healthy; 62% said they lack the time to do so.²³

Meanwhile, links between different kinds of work-induced stress and health needs are significant. Data also suggests that health costs are connected to financial insecurity, and this figure is higher for women (64%) than for men (55%).²⁴

In addition to having specific healthcare needs, women have unique financial needs. Women are financially stressed: 43% of women responded that they are stressed about their financial situation. Financial stress can shape the path of a woman’s career. Women who are financially stressed are more likely to leave their current place of employment.

Being financially savvy matters for women. How women perceive their financial knowledge is also an important indicator of career decisions. Research has shown that perceived knowledge is more important than actual knowledge. Women who are financially savvy are more likely to try to advance themselves in their current organisation.

- Higher financial **courage** leads to higher engagement, which leads to higher financial wellness
- **Financial courage has more bearing** than actual financial knowledge on a woman’s ability to improve her financial situation
- Women spend **more time worrying** about money, especially short-term expenses
- Women are **less prepared** for retirement
- Women are **less likely** to have used a financial advisor or participated in an employer-offered, financial education program²⁵

Women who have more stress about money also tend to report more frequent engagement in unhealthy or sedentary behaviours to manage that stress; consequently, they are significantly more likely to rate their health as fair or poor. By helping women reduce their financial stress, employers may not only improve productivity, but also reduce healthcare costs and absenteeism related to physical illness.²⁶

²³ Center for Talent Innovation, 2015.

²⁴ Women’s Forum for the Economy and Society: Daring Circles, 2015.

²⁵ Mercer, Ellevest, InHerSight. “Infographic: The Hidden Effects of Financial Confidence on Women’s Careers,” 2018, available at www.inhersight.com/research/hidden-effects-financial-confidence-womens-careers?_n=65621449.

²⁶ Mercer. “Inside Employees’ Minds,” 2017.

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Technology: The missing link

Broadly improving D&I is clearly high on the agenda for the vast majority of organisations in Turkey. In virtually all aspects of D&I efforts — from data analysis, candidate sourcing and selection, learning and development, talent management, employee communications, and health and well-being — technology can drive systematic and scalable change and truly transform organisations. This represents a significant area of opportunity and attainable intervention for many organisations looking to make progress.

Yet our research found that less than half of organisations in the country are actually leveraging technology for these purposes:

- Nearly two-thirds (63%) of organisations in Turkey say they review talent-management practices to mitigate biases, yet only 42% use technology to systematically address D&I challenges, as compared to global results, 58% and 30%, respectively.
- Of the 42% using technology for D&I, the majority are deploying it for candidate sourcing and selection, leadership development, performance management, learning and development, career management and mentorship, and pay equity analysis.



Just as organizations leverage technology to improve the efficiency and effectiveness of other strategic business initiatives, technology should be used to enhance D&I by delivering real-time data and insights and empowering leaders to make better people decisions.

— Carole Jackson,
Diversity & Inclusion Research and Consulting, Mercer





The rise of a transformative market

In 2018 and 2019, Mercer partnered with RedThread Research to research the D&I technology market and understand how organisations leverage technology to enhance their D&I efforts.

The market for D&I technology has been gaining traction over the past 18 months.²⁷ The report found that the largest percentage of D&I solutions focus on talent acquisition (43%), supporting organisations with candidate sourcing and selection. Yet numerous technologies exist that can help drive a more inclusive culture and more equality in opportunity, experience and pay.

We believe D&I technology has the potential to be a disruptor to the structural biases (intentional or not) that hide in our processes and behaviours. Applied correctly, technology can enable scalable, consistent decision-making while also alerting users to previously hidden patterns of bias. Much of the technology on the market is designed to change the processes that enable bias or identify that bias exists. Another benefit that customers

see in D&I technology is the increased understanding of the current state of D&I throughout the organisation. With greater visibility, leaders can better measure and monitor the impact of D&I initiatives.

On the other hand, the use of technology to address D&I issues comes with latent risks, such as the potential for bias in artificial intelligence (AI) algorithms. Research shows people often misunderstand AI and overestimate the power of using such technology in their decision-making.^{28,29} Being an informed consumer of these AI technologies is a critical step in ensuring unbiased assumptions and objective outcomes.

I am a huge fan of data-driven insights and analytics to drive action.

— Leena Nair,
Chief Human Resources Officer, Unilever

²⁷ RedThread Research, Mercer. "Diversity & Inclusion Technology: The Rise of a Transformative Market," 2019, available at www.redthreadresearch.com/wp-content/uploads/2019/05/Diversity-and-Inclusion-Technology_The-Rise-of-a-Transformative-Market_low-resolution-file.pdf.

²⁸ Bezrukova K, Spell CS, Perry JL, Jehn KA. "A Meta-Analytical Integration of Over 40 Years of Research on Diversity Training Evaluation," Cornell University, SHA, 2016, available at www.scholarship.sha.cornell.edu/articles/974.

²⁹ Dickson B. "Artificial Intelligence Has a Bias Problem, and It's Our Fault," PC Mag, 2018, available at www.au.pcmag.com/features/57070/artificial-intelligence-has-a-bias-problem-and-its-our-fault.

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05

A look back and a call forward

Five years ago, we began an important conversation about equality.

At the time, we thought that conversation, and our work, would focus primarily on pursuing gender equality in business. We thought we would show leaders how enabling women to succeed and achieve parity at work would positively impact outcomes for companies. And we did.

We went on to work collaboratively with businesses across industries to execute strategies that would accelerate gender equality in the workplace. As a result — as shown in this year's report — we are now able to identify the strategies companies need to move the needle on gender equality. Passion, personal leadership and perseverance — matched with analytics, proof, culture and the right mix of programmes — have emerged as true accelerators of gender equality.

What we could never have known in 2015 was how transformative this conversation — and the work it would inspire — would be, not only to our client companies, but to society at large. We knew we'd prove that when women thrive, businesses thrive. What we discovered is that when women thrive, the world thrives.

Companies have risen to that challenge. They have committed to bringing equality not only to their employees, but to their entire value chain. These organisations are investing, executing and reaping the benefits of equality not only in their own workforces, but in their entire ecosystem — from female suppliers or farmers, to distributors and shop owners. Boards and shareholders are also applying new,

external pressure for accountability, which is becoming an accelerator for equality inside and outside companies.

The effect has been a profound and sustaining change. When companies strive toward equality, they influence and change the societies around them.

The intersection of business change and societal change will be critical to meeting the challenges we still face. This year's report makes clear that we still have much work to do.

If business leaders want to achieve equal representation of women in the workforce, with equal participation in the economy, at equal pay, they will need to lead the way. That last mile will require creating even more purposeful and disruptive changes, not just within company walls, but in society.

It won't be easy, but we're confident that business leaders are up to the task. We certainly saw that this year in the excitement, hope and energy they brought to the When Women Thrive breakfast session at the World Economic Forum in Davos in January 2020. We saw the largest-ever percentage of male leaders joining the influential female leaders on our panels and in our audience. There was also a broader

diversity of voices and geographies, including from Latin America, Asia, the Middle East and Africa.

We also take this opportunity to thank Pat Milligan, When Women Thrive founder, for her profound support and commitment to gender equality — and driving important thought leadership on this imperative. Her passion has inspired many individuals and organisations to undertake and persevere in the pursuit of gender equality.

We have a huge amount of confidence that organisations globally will continue with this same level of passion and commitment, and we look forward to what the next decade has in store.

The future is very bright.

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Participating organizations

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Mercer extends a sincere thanks to the 68 organisations in Turkey that participated in our research. Those listed below have agreed to be recognised in this report. This is not a comprehensive list of all participants, as some organisations chose not to be recognised.

- AbbVie Tıbbi İlaçlar San.Tic.Ltd.Şti.
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- United Group
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Glossary of terms

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Adjusted pay gap	Adjusted pay gap is the estimated difference in pay between two groups after accounting for factors such as job, level in the organization, etc. Gaps that remain after accounting for such factors may indicate the presence of pay inequities in an organization.
Bias	Bias refers to the practice of favoring a person or a group of people based upon attributes such as gender, race or ethnicity, religion, sexual orientation, age or any other class.
Business resource groups (BRGs) or employee resource groups (ERGs)	BRGs and ERGs are communities of employees organized around a common dimension (for example, those who share similar backgrounds, experiences or interests) to network, share views, learn from others, further professional growth and development, and drive business.
Diversity	Diversity refers to a variation in backgrounds, attitudes, values, beliefs, experiences, behaviors and lifestyle preferences with respect to gender, race, ethnicity, nationality, language, age, cognitive and physical abilities and characteristics, sexual orientation, education, religion, socioeconomic situation, marital status, social roles, personality traits and ways of thinking.
Environmental, social and governance (ESG) investing	Environmental governance investing is a part of a responsible investment approach that includes ESG factors and broader systemic issues — for example, climate change and sustainable development — along with active ownership (stewardship). These considerations can have a material impact on financial performance, and their inclusion is more likely to lead to sustainable investment outcomes in the future.
Equality, equity or parity and gender balance	<p>Equality, equity or parity is the state of being equal across all aspects in an organization (for example, pay, promotions and fair treatment of people), representation of men and women at all levels, and like pay for like work, without any bias.</p> <p>Mercer POV: Equality, equity and parity can be used interchangeably. The term “gender balance” refers specifically to the pursuit of achieving a 50:50 ratio between women and men.</p>
Equal pay	Equal pay is achieved when the raw gender pay gap, the difference in average pay of women and average pay of men across the entire organization, is zero.

Experienced worker	<p>Experienced workers are mature workers aged 55 and older.</p> <p>Mercer POV: "Experienced worker" is preferred terminology to "older" or "seasoned" worker references, as these terms have inherent bias and negative connotations.</p>
Inclusion	<p>Inclusion refers to practices that provide an equitable and fair distribution of resources, such as jobs, income and access to opportunities and information. Such acts and practices enable all members, including those from underrepresented groups, to be respected and appreciated for their unique contributions and to be fully integrated into the formal and informal networks of an organization.</p>
Internal Labor Market (ILM) Analysis®	<p>Mercer's ILM Analysis is a proprietary tool that provides a fact-based platform for human capital decision-making. At a basic level, it examines the flow of people into, through and out of an organization to answer fundamental questions about a firm's workforce: who gets hired, who performs well, who advances and who stays.</p>
Intersectionality	<p>Intersectionality is the complex and cumulative way that the effects of different forms of discrimination (such as racism, sexism, classism, socioeconomic status) combine, overlap and intersect.</p>
Pay equity	<p>Pay equity is the state of receiving equal pay for equivalent work.</p>
Raw pay gap	<p>The raw pay gap or "unadjusted pay gap" refers to the actual difference in pay between two groups, such as between men and women. Raw pay gaps can be influenced by many factors, such as job, level in the organization and location.</p> <p>Mercer POV: "Unadjusted pay gap" is interchangeable with "raw pay gap."</p>
Unconscious bias	<p>Unconscious or implicit bias is the subliminal tendency to favor certain people or groups of people based upon learned stereotypes.</p> <p>Mercer POV: "Unconscious bias" is interchangeable with the term "implicit bias."</p>

World Economic Forum

The World Economic Forum engages the foremost political, business, cultural and other leaders of society to shape global, regional and industry agendas. Its activities are shaped by a unique institutional culture founded on the stakeholder theory, which asserts that an organization is accountable to all parts of society.

The Forum carefully blends and balances the best of many kinds of organizations, from both the public and private sectors, international organizations and academic institutions. Mercer and the World Economic Forum have forged a long-standing partnership and host cutting-edge events at annual meetings in Davos, Switzerland. The events bring together global thought leaders who aim to explore disruptive strategies that are creating more sustainable futures.



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EDGE Certification is the leading global assessment methodology and business certification standard for gender equality. Getting certified validates an organization's ability to create an optimal workplace that benefits both women and men. EDGE Certification provides a competitive advantage by recognizing an organization as a gender-enlightened environment in which to work, invest and do business.

60 About Mercer

Mercer builds brighter futures by redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and well-being. Mercer's more than 25,000 employees are based in 44 countries, and the firm operates in over 130 countries. Mercer is a business of Marsh & McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people, with 75,000 colleagues and annualized revenue approaching \$17 billion. Through its market-leading businesses, including Marsh, Guy Carpenter and Oliver Wyman, Marsh & McLennan helps clients navigate an increasingly dynamic and complex environment.

Professional Women's Network (PWN)

PWN Global is a global movement of people working toward gender-balanced leadership through professional development and international, cross-industry online and in-person networking. With more than 4000 members and more than 90 nationalities, our volunteer-led organization delivers more than 600 events a year in our community of 27 city networks.

We believe that leveraging 100% of the world's talent will result in a happier, economically sustainable society. Gender-balanced decision-making creates strength of character, resilience and growth. We aspire to accelerate the pace of change and inspire our community to embrace new skills and put reforms into action.

PWN Istanbul is the 22nd city network. It was founded in October 2013 with almost 300 individual members and more than 10 corporate events for networking, knowledge sharing and learning together with development opportunities for both women and men. Our mission is to support the growth of gender-balanced leadership both in business and social life.

People Management Association of Turkey (PERYÖN)

PERYÖN is Turkey's first non-governmental organization with a people management focus. It has four regional branches, two representative offices and more than 3,000 members. PERYÖN generates knowledge through research and projects; provides information and ideas to policy and law makers and to the media; provides thought leadership to people management professionals and other NGOs; and supports networking and career development of its members through seminars, conferences, symposiums, working groups and project teams. PERYÖN is a member of the European Association of Personnel Management and The World Federation of Personnel Management Associations.

