



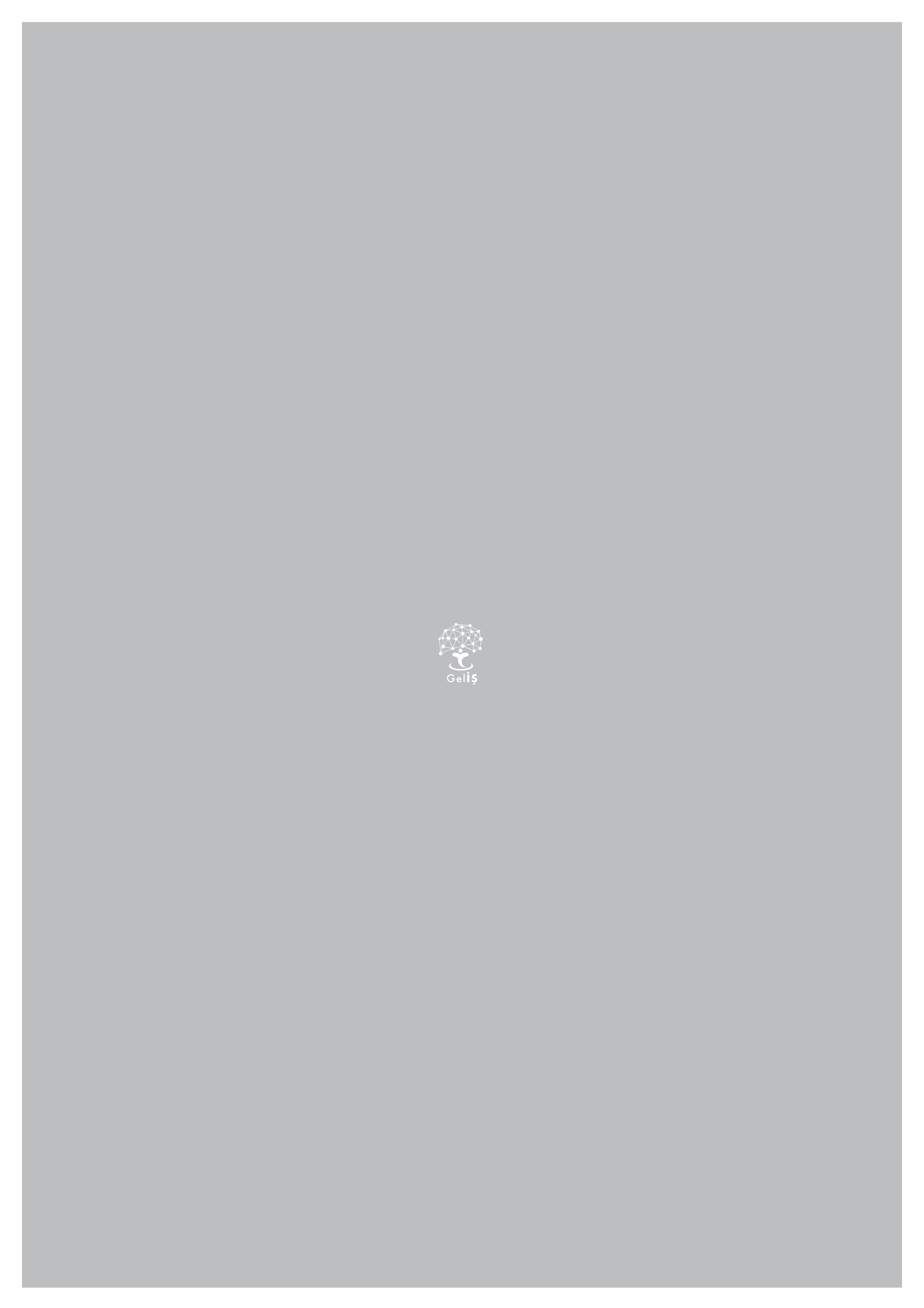
**TECHNICAL ASSISTANCE FOR PROMOTING  
DECENT FUTURE OF WORK APPROACH WITH  
A FOCUS ON GENDER EQUALITY  
  
(TREESP1.3. FoW/P-01)**

**TURKEY**

**CATEGORY 4: COORDINATION AND COOPERATION MECHANISMS**

**Intervention 12: Workshops for Studies**

**Sub-Intervention 12.1: Pre-Study Workshop for Sector Studies**

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# INTRODUCTION

This Report summarises proceedings during a Pre-Study Workshop on Sector Studies held in February 2022. The Report contains, as Annexes, all the PPT presentations which were delivered during the Workshop, gives an overview of the main points raised during discussions, and sets out the policy recommendations which were put forward by participating stakeholders.

# CONTEXT

The Project’s Terms of Reference (ToR) has set the following task for TAT in the delivery of Intervention 12**:**

*8 workshops will be organised in Ankara to discuss for studies which will be conducted under Category III: Scientific & Technical Studies with the participation of relevant public institutions, academicians, NGOs, social partners, professional organisations, representatives of private sector. 2 workshops will be organised for each study. (4 pre-study workshops and 4 post-study workshops) 50 participants will attend to each workshop and will last one day. 5 participants out of 50 will be outside of Ankara. 10 staff of the Operation Beneficiary will participate to each workshop.*

Sub-Intervention 12.1 relates to the Pre-Study Workshop on Sector Studies. The Project’s ToR for Sector Studies (Intervention 8) is as follows:

*Sector studies will be conducted in five sectors to determine their labour demands, skills and occupations within the scope of Future of Work approach. Indicative sectors which are chosen in accordance to the ILO Reports issued on 2017 and 2019[[1]](#footnote-1), can be chosen among informatics/automation, education, health, transportation, media/communication, energy, finance and banking sectors, etc. Final decision to define 5 sectors is subject to the prior approval of the Operation Beneficiary. Each sector analysis will be carried out in the perspective of the prominent professions of the future, the qualifications of the labour force that will be needed, the lost professions, the policy proposals that are compatible with the works of the future, etc. The research will be carried out as desk study in the light of current social and technological developments and academic and scientific studies. The research will include also 750 indicative face to face interviews (30 people from each sector and from each city) with representatives of institutions/organisations, employers, employees, etc. in Ankara, Adana, Bursa, İstanbul and İzmir. A detailed report will be drafted in English with executive Turkish summary by including each sector and it will be used to update relevant strategy plans and/or policies. It will be published on the official web site of the Operation Beneficiary.*

# BACKGROUND

As can be seen in the ToR requirements for Intervention 12, the original concept was for the Pre-Study Workshops to be held as in-person events in Ankara. At the beginning of the Project, TAT planned to deliver these Workshops online, owing to pandemic restrictions then in place. With the easing of these restrictions, an in-person event became a possibility, although TAT argued that there remained merit in conducting the Workshops online as this would allow greater participation from the pilot provinces than would be possible were the Workshops to be held in-person in Ankara. This argument was accepted by the Operational Beneficiary and by the Contracting Authority and confirmed by Administrative Order No.2.

# AGENDA

The Agenda for the Workshop was developed by TAT in discussion with its experts, and was then submitted for comment and approval to the Operational Beneficiary. The agreed Agenda for the Workshop was:

**Intervention 8:**

**Pre-Study Workshop**

|  |  |
| --- | --- |
| **Date** | 8 February 2022 – Time 10:30 – 16:00 |
| **Participants** | * Presidency of the Republic of Turkey (Strategy and Budget Department), * Ministry of Labour and Social Services, DG Employment Policies, * Provincial Directorates of ISKUR (Adana, Ankara, Bursa, İstanbul İzmir) * Ministry of Industry and Technology and Development Agencies (Adana, Ankara, Bursa, İstanbul İzmir), * Ministry of National Education, * Provincial Directorates of Ministry of National Education, (Adana, Ankara, Bursa, İstanbul İzmir), * Ministry of Health * Provincial Directorates of Ministry of Health (Adana, Ankara, Bursa, İstanbul İzmir), * Ministry of National Energy and Natural Resources, * Ministry of Treasury and Finance * The Union of Chambers and Commodity Exchanges of Turkey (TOBB) and Provincial Chambers (Adana, Ankara, Bursa, İstanbul İzmir), * ISKUR * The Banks Association of Turkey (TBB) * Banking Regulation and Supervision Agency (BDDK) * Capital Market Boards of Turkey (SPK) * Insurance Association of Turkey (TSB) * Energy Market Regularity Authority (EPDK) * DEIK, Business Councils * Information and Communication Technologies Authority (BTK) * Academics * Turkish Education Association * Education Unions * Provincial Chambers of Turkish Medical Association (Adana, Ankara, Bursa, İzmir, İstanbul Provincial Chambers) * Provincial Chambers of Turkish Pharmacists Association (Adana, Ankara, Bursa, İzmir, İstanbul) * Turkish Nurses Association (Provincial branch offices) * Provincial Chambers of Turkish Dental Association (Adana, Ankara, Bursa, İzmir, İstanbul) * Petroleum Pipeline Corporation (BOTAS) * Energy Employees Unions (Enerji-iş, Enerji-Sen etc.) * Energy Traders Association * Informatics Association of Turkey (TBD) * Game Developers Association of Turkey (TOGED) * Animation Technologies and Game Development Center (METU ATOM). |
| **Objective of the meeting** | The objectives of the Pre-Study Workshop are:   1. to present findings from the Desk Research Reviews and SWOT meetings; 2. Discussion of current challenges and opportunities of sectors; 3. Presentation of methodology for research; 4. Enlist support for identifying interviewees for face-to-face interviews. |
| **Zoom link** |  |

**AGENDA**

|  |  |  |
| --- | --- | --- |
| Time | Subject | Responsibility |
| 10:30-10:11 | Opening Speech | MoLSS / DG / Department of Employment Policies DG |
| 11:00-11:30 | Introduction of the project | Michael Chambers  (Team Leader, FoW Project) |
| 11:30-12:30 | Presentations   * Presentation of current situation (desk study) * Presentation of findings from Sectoral SWOT results, * A first draft roadmap for sector studies related to future of work, | Sandra Bustamante,  (Employment Expert, FoW Project)  Oğuzhan Akyıldırım  (Research Expert, FoW Project) Participants |
| 12:30-14:00 | Lunch Break |  |
| 14:00-16:00 | Presentations   * Presentation of the sectoral research methodology, * Logistics for face-to-face interviews * Collection of feedback * Evaluation and Wrap-up | Oğuzhan Akyıldırım  (Research Expert, FoW Project)  Participants  (Team Leader, FoW Project) |

# STRUCTURE OF WORKSHOP

The 1-day Workshop was, broadly, divided into 2 halves: the morning session comprised a series presentations from MoLSS, TAT and TAT’s experts aimed at summarizing work undertaken to date, and explaining the context of the overall Sector Studies’ initiative and how it would be developed; the afternoon session was focused on stakeholder discussions, held in 5 ‘break-out rooms’, with each room discussing a specific sector, with moderation provided by TAT’s experts – feedback from each room was delivered immediately prior to the final wrap-up session.

This structure seemed to work successfully. The afternoon attendance was equal to the morning’s, indicating that stakeholder interest had been maintained, and discussions in the break-out rooms proved to be lively. A significant number of interesting insights emerged, together with a range of possible policy recommendations: these are summarized in Sections 8 and 9 below.

# ATTENDANCE

The Operational Beneficiary issued official invitations to a wide range of relevant stakeholders to participate in the Workshop. This resulted in the following attendance:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Total Attendance** | **Public Sector** | **Private Sector** | **NGOs, etc.** | **From Outside Ankara** | ***TAT*** |
| 77 | 55 | 1 | 13 | 24 | 8 |

# PRESENTATIONS

## 7.1 Introduction by MoLSS

There was no PPT presentation, but Ms. Ceylan Çifçi emphasized MoLSS’s commitment to supporting a decent future of work for Turkey. The FoW Project had been designed to play an important role in supporting MoLSS’s efforts in this regard, and was one of two elements currently in operation (the second, a major grant scheme administered by MoLSS had also begun). The reduction/elimination of mobbing from the workplace was an essential element of developing a sense of decency at work.

## 7.2 Overview of the Project

Mr. Michael Chambers, FoW Project Team Leader, delivered a PPT presentation (see Annex 1) which explained the structure of the Project and provided the context for the Pre-Study Workshop. With regard to sector studies, he said that TAT had conducted desk research into a range of sectors (which would be summarized by Ms. Sandra Bustamante, from which the Operational Beneficiary had selected 5 sectors for further study: Education, Health, Energy, Banking/Finance, and ICT.

## 7.3 Summary of Desk Research

Ms. Sandra Bustamante presented a summary of the exhaustive desk research which TAT had carried out, examining the 5 selected sectors in the light of Turkish and international trends, and developing a series of preliminary policy recommendations (see Annex 2).

The desk research had highlighted the following areas for consideration during the field studies and stakeholder meetings:

### 7.3.1 Summary of Common Points for Further Consideration

· Policies on education of new skills are needed with prepared centres with new technologies.

· Desk research shows a generally healthy situation in each sector.

· Each sector will face many challenges over the coming decade.

· Change will eliminate many traditional jobs.

· Change will also provide many new job opportunities.

· Flexibility, adaptability, and creativity to be encouraged.

· Education must meet the needs for new skills.

· Public/private partnerships to be strengthened to ensure demand/supply balance for new skills.

### 7.3.2 Education

* VET can play a central role in preparing young people for work, developing the skills of adults, and responding to the labour-market needs of the economy.
* Strong vocational programs increase competitiveness, but many programs fail to meet labour market needs. The linkages between VET and the labour market need to be strengthened to meet the need for skilled manpower.
* 21C skills: creativity, learning to learn, ITC literacy and new skills in sustainable and economic development, gender equity, global citizenship.
* Role of educators is evolving as learning facilitators, career counselors, vocational instructors, social workers.

#### 7.3.2.1 Preliminary Policy Recommendations According to Participants Suggestions

* Strengthen systems for the validation and recognition of all forms of learning aimed at reskilling and upskilling workers – ‘building back better’ and achieve full employment.
* Quotas of higher education institutions to be determined by: sectoral and regional skills need; intake capacities; supply and demand equilibrium; and minimum occupancy rates of existing programmes.
* Develop and reinforce capacities of TVET trainers and trainees, and of the TVET managers to adjust to constantly evolving circumstances. (Includes capacity development for ‘blended learning’ - a combination of face-to-face and remote training, online and offline instruction, and high-/low/no-tech solutions).
* Enhance access to education and training, improving internet infrastructure, ensuring affordable connectivity, and investing in developing/maintaining easy access to distance learning platforms and learning spaces.

### 7.3.3 Health

* Jobs need to be redefined (embracing telehealth and mobile clinics).
* NSFE (Non-Standards Forms of Employment) - fixed term and part-time work, temporary and agency work - need to be better regulated.
* Women participation in the sector is high but there is a gender pay gap of 20%.
* Technological advances will have significant impact - Mobile Health App, 3D, AI, Electronic health, Genomics (E-Health services).
* New skills needed for tasks of greater complexity (telemedicine, cybersecurity), requiring high-quality education and lifelong learning.
* Increased demand is expected (over 60´s expected to increase by 51% by 2050 impacting care services and end of life services), and sector will require significantly more jobs by 2030.

#### 7.3.3.1 Preliminary Policy Recommendations

* Policies to deal with demographic and epidemiological challenges that could affect equity in access to quality health service. (More of 50% of older people will not have access to long term care).
* The sector also could be an exemplar of gender equality and decent employment opportunities for women and young people.
* Important also to properly compensate women’s contribution to the care economy and solve the pay gap (more pronounced than in other sectors).

### 7.3.4 Energy

* The National Development Plan includes a special section on renewable Energy.
* Renewable energies represent a great opportunity to Turkey for employment, and gives a possibility for women in non-traditional areas.
* New skills are needed to support the ongoing global energy transition to renewables. More vocational training is required, stronger curricula, more teacher training and expanded use of ICT for remote learning. Possibility that renewable energy can be better integrated into national curricula for students in all levels of education.
* Public-private partnerships for meeting sectoral labour requirements, promoting national skill standards, providing on-the-job training, and improving the quality of training overall.

#### 7.3.4.1 Preliminary Policy Recommendations

* ICT can play an important role in the delivery of education and training related to renewable energy.
* Partnership of industry and TVET institutions (experts to contribute to the curriculum as well as deliver training digitally) + industry financing of TVET programs.
* Public-private partnerships for meeting sectoral labour requirements, promoting national skill standards, providing on-the-job training, and improving the quality of training overall.
* More focus on educating girls and women in the renewable energy sector + STEM.
* Increase numbers of women in the renewable energy sector, through improved workplace conditions, mentorship, and professional development.

### 7.3.5 Financial and Banking Sector

* Banking dominates Turkish financial sector, accounting for more than 70% of overall financial services, but insurance services and other financial activities show significant growth potential.
* Employment likely to grow with a new model of employee/employer and employer/client relations (more agile workforces). Opportunities for young people through mobile banking.
* The National Development Plan includes digital transformation and the creation of Digital Transformation Centers, prepared for cybersecurity training and new technologies
* Many coming digital banking skills: Artificial Intelligence, Big Data Analytics, Blockchain Engineering. These skills constitute a real challenge particularly for women.
* Ability in European languages of capital markets, and awareness of professional financial conduct to be enhanced.

#### 7.3.5.1 Preliminary Policy Recommendations

* Policies on education for new skills needed with prepared centers of new technologies.
* Need to develop new talent models to facilitate flexible, self-organizing teams that come together for a common purpose.
* Institutions should also focus on workplace redesign - to achieve balance between in-person work environments and remote arrangements - based on specific needs of various roles or jobs.
* Working women need care services to facilitate their involvement in digital transformation.

### 7.3.6 ICT

* ICT is in a central position that affects the development of the other sectors and has a multiplier effect on the economy. (TKP - 2019 – 2023)
* ICT-linked employment in these industries has grown during the last years (except during 2020) and it continues, giving opportunities to young people, women and PwDs. However, the sector has a long tradition of insecure work (atypical work).
* Upskilling and reskilling initiatives will play a key role in talent transformation. (21.1m workers will need to improve their skills to be better equipped for retain their positions and to seize new opportunities). New skills in cybersecurity will be needed.
* Crowdsourcing is a developing trend.

#### 7.3.6.1 Preliminary Policy Recommendations

* Need to normalize new job tasks, particularly in digital technology.
* Companies and employees need to evaluate the ‘standard’ employment relationship in a new work environment (that embraces automation, AI, and digital technologies)
* SMART policies needed to raise productivity levels and ensure sustainable, inclusive economic growth through basic and applied research.
* Need to accelerate mechanisms and incentives through job centres for acquisition of transferable new technological skills.
* Need to encourage mindset of lifelong learning opportunities - “learning to learn”.

These issues would be pursued during the course of the Workshop.

## 7.4 Summary of SWOT Analysis Workshops

Mr. Oguzhan Akyildirim presented a summary of a series of sector-specific SWOT Analysis Workshops which had been conducted in February with relevant stakeholders (see Annex 3 for the SWOT Analysis Workshops’ Report).

**STRENGTHS**

**EDUCATION – STRENGTHS**

* The high rate of female employees in the Education Sector,
* Young teachers can adapt to digital technologies faster
* Providing in-service digital trainings to increase the skills of experienced teachers regarding the use of digital technology
* As a result of strengthening the link between Vocational High Schools and Vocational Training Centres and the Private Sector, increasing skills as well as employability through vocational trainings for the workforce needed by the Private Sector in different fields.
* Compliance of the regulatory infrastructure

**HEALTH – STRENGTHS**

* High rate of female employees
* The young generation in the sector is dynamic and innovative with their ability to learn quickly and adapt to technology.
* The fact that the sector has cross-cutting aspects with different sectors
* The rapid development of Health Tourism
* In-service training given in workplaces
* Having the qualified infrastructure of the Health System

**ENERGY – STRENGTHS**

* Increasing female employment rate in wind and solar energy sub-sectors, which are among renewable energies
* Qualified workforce in the energy sector
* To have an entrepreneurial young population that adapts quickly to digital transformation and has fast language adaptation
* The sector has international legislation and standards
* The development of the concept of doing business with automation in the energy sector with the effect of digital transformation
* The old traditionalist generation has a lot of knowledge/experience and can adapt to digital transformation

**BANKING AND FINANCE – STRENGTHS**

* The fact that the rate of female employees in the sector is higher than many other sectors,
* Increasing number of women among managers
* High quality of manpower and high level of education,
* Positive impact of Internet, Mobile Banking on the industry's business volumes, business models and employment
* The rapid technological transformation of the sector
* The sector's ability to provide both internal and external resources in order to provide the needed financing to the Turkish economy.
* Having the infrastructure to develop all kinds of new banking and finance applications
* New working models in banking
* Reliability of the industry
* Having strong and diverse capital
* The education system provides adequately equipped personnel to the sector.
* Sustainable development certificate programs, professional association training

**ICT – STRENGTHS**

* Balance in the number of women and men at the engineering level in the sector
* Increasing interest of young people in the sector
* Having intersections of the sector with all sectors
* The IT Sector has a broad perspective
* Institutions/organisations have financial support programs for the sector
* Student business co-working environments
* Providing employability-enhancing trainings by NGOs and institutions/organisations

**WEAKNESSES**

**EDUCATION – WEAKNESSES**

* The low participation rate of women in management
* The fact that women have a high workload due to the combination of working life and home life negatively affects their professional development.
* Experienced teachers are less equipped to use information technology than younger teachers
* The fact that the flexible working conditions and wages of teachers working in the private sector are unsatisfactory, negatively affect their motivation.
* Failure to integrate the education curriculum with technological developments
* The lack of sufficient trainers for different branches needed in various sectors in vocational high schools or the need to increase the skills and knowledge of existing trainers
* Incentives are not sufficiently announced

**HEALTH – WEAKNESSES**

* The proportion of women in management positions is low
* Heavy working conditions
* Lack of qualified auxiliary personnel and intermediate staff'
* Lack of supply from doctors and pharmacists for open positions
* Accelerating the brain drain abroad in the health sector
* Investor-employer ratio is below the average of Turkey
* Density caused by citizens not knowing the functioning of the health system

**ENERGY – WEAKNESSES**

* In the Energy Sector, gender preferences are predominantly in favour of men
* The rate of female employees is low
* Women's interest in the sector is low
* Low job vacancies in the industry
* Due to the insufficient production of technological products needed in the energy sector, the tendency to purchase imported products is high.
* Industry audit and measurement issues
* Lack of brand awareness
* Legislation is not clear enough
* Insufficient funding

**BANKING AND FINANCE – WEAKNESSES**

* Small scale compared to developed countries
* The financial sector has lost its popularity among recent graduates and young professionals.
* Experienced generation being more distant from technology than younger generation
* Since banks are not perceived as technology companies, technology graduates do not apply.
* Low interest of women in IT training
* Difficulty attracting talent
* Especially low soft skills in new graduates

**ICT - WEAKNESSES**

* Lack of qualified personnel due to brain drain abroad
* Low quality of education in universities
* Lack of equipment in the training provided
* Low interest of women in information technologies
* Informal work of people doing business abroad
* Alumni profile and employer demands mismatch (skill gaps)
* State incentive legislation is running with the old system
* Lack of sound action plans
* Attracting trained personnel from SMEs with the opportunities offered by large-scale companies

**OPPORTUNITIES**

**EDUCATION - OPPORTUNITIES**

* The intersection of education with all sectors
* Educational activities to encourage women to entrepreneurship
* Position-less working-education environment without the concept of time and space with the pandemic process
* Having financial supportprograms for capacity building in the education sector, improving education curriculum and technical infrastructure of schools
* Supporting the efforts of teachers from all age groups to improve themselves through professional development and different educational development programs
* Conducting special studies for disadvantaged areas
* Vocational courses include practical internship applications
* Studies to improve equality of opportunity in education and vocational training
* Increasing the financial resources that can meet the training demands of teachers for developing technologies

**HEALTH - OPPORTUNITIES**

* Carrying out studies on the targeted components of the health transformation project
* The positive contribution of new technologies to the health sector
* Positive effects that will emerge as the health system adapts to digital transformation
* Open jobs brought by the future development of the fields of telemedicine, Robotic Surgery, Artificial Intelligence
* The need to address health literacy trainings for citizens within the scope of the Health Transformation Programme
* Standardization of education in the health sector in legislation

**ENERGY - OPPORTUNITIES**

* The preference of women for the energy sector-oriented vocational departments of universities is increasing.
* Potential for an increase in energy investments in the future
* Increase in government support provided to the sector
* Increasing demand for investment in open business areas
* Increased opportunities to be closer to the EU market as a result of technical harmonisation with the EU Convention
* Increasing employee-employer collaboration environments

**BANKING AND FINANCE – OPPORTUNITIES**

* High growth potential of the financial sector
* The pandemic process accelerates the transformation of alternative distribution channels
* Elimination of time and space constraints for employees
* Increased collaboration between banks and technology companies
* The effect of the young population profile on the technological development of the sector
* Giving new generation knowledge and skills training to the experienced generation
* Increasing the new generation rooted interbank communication with the cooperation of Start-Up and Fintech
* Accelerating the transformation of alternative distribution channels
* Blockchain developments

**ICT – OPPORTUNITIES**

* Highly educated young population
* Excessive interest of the young population in the sector
* Having intersections of the sector with all sectors
* Efforts to increase youth and women employment
* The positive effect of the gaming industry on women's employment
* Fast conversion to the metaverse side
* More involvement of the sector in the competitive market
* Increasing the incentives and supports given to the sector

**THREATS**

**EDUCATION – THREATS**

* Sustainability of Information Technologies trainings is not at a satisfactory level
* Weak technological infrastructure in disadvantaged areas
* Rapid transformation of future-oriented knowledge and skills
* Obsolete recruitment processes

**HEALTH - THREATS**

* Slowing of professional development due to the workload of health personnel
* Affected by burnout syndrome
* Insufficient follow-up of technology in health
* Inaccurate information about health given to citizens on the Internet,
  + Obsolete recruitment processes

**ENERGY - THREATS**

* Insufficient number of personnel with the communication skills required by the sector
* Long-term resolution of gender-based preferences in recruitment
* The younger generation does not show enough interest in the knowledge and skills conveyed by the experienced generation.
* Automation replaces blue-collar employees if blue-collar personnel adapt to Digital Transformation late
* Insufficient product and product replication support
* Obsolete recruitment processes

**BANKING AND FINANCE – THREATS**

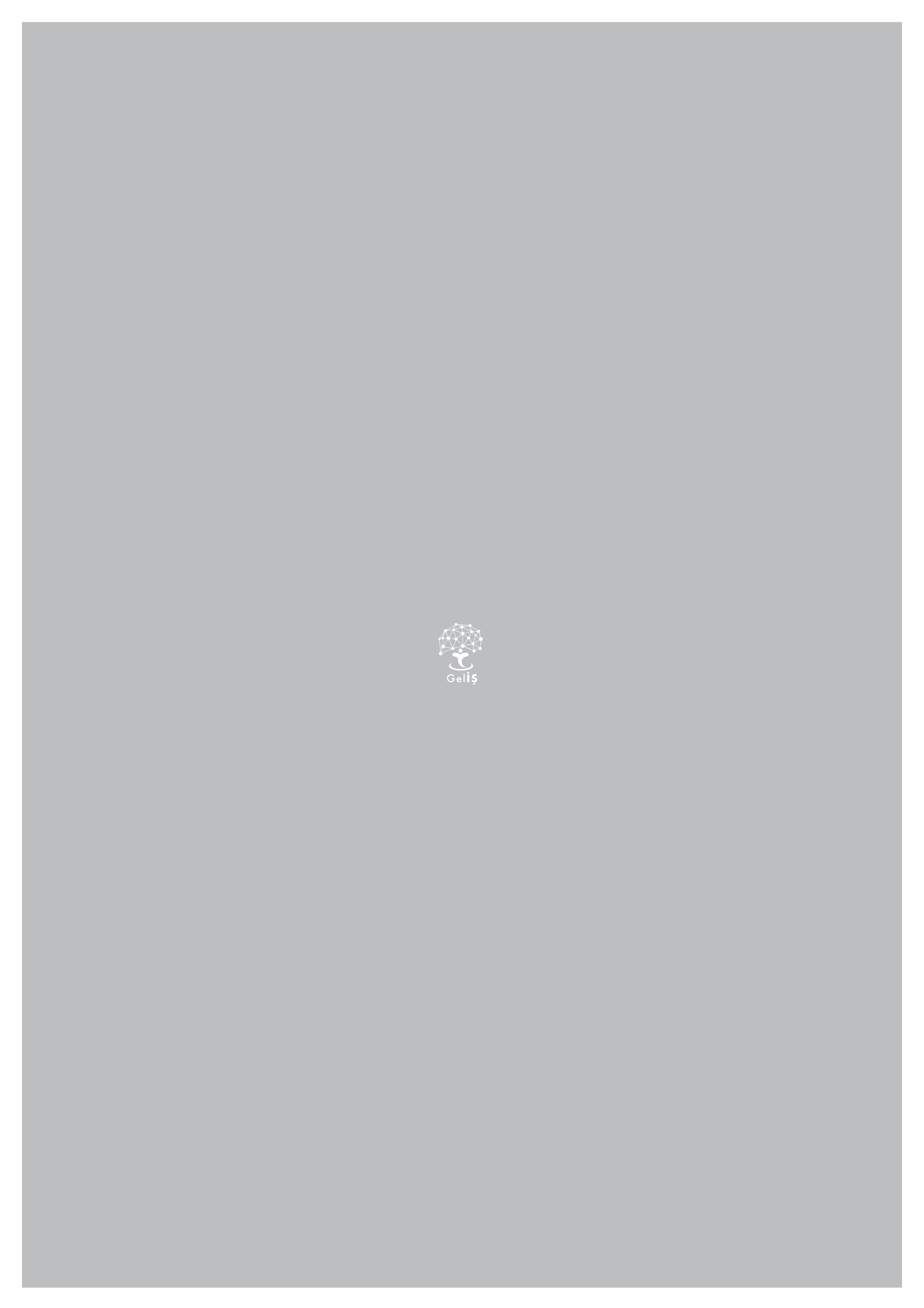
* Infrastructure needs for the inclusion of the financial sector in the system with private capital
* Low awareness of new generation financial instruments and lack of legislation
* New talents do not prefer the financial sector
* Question marks on the work-life balance of young employees in the banking sector
* Robo-technology, digital technologies replacing workers
* Fin-Tech and e-Commerce, competitive pressure of start-ups
* Currency substitution
* Declining propensity to save
* Obsolete recruitment processes

**ICT – THREATS**

* Insufficient meeting of the intense human resource needs in the industry
* The low number of female personnel in professions other than engineering
* Loss of investment as a result of major game development companies being sold abroad (killing the goose that lays the golden egg)
* Lack of interdisciplinary interaction for future planning
* The studies planned to continue the competition in this field in the global world have not been clarified yet.
* Obsolete recruitment processes

**FoW TAT**

**March 2022**

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1. [↑](#footnote-ref-1)