



Information and  
Communication  
Technologies Sector

2015 Market Data

31 May 2016, Istanbul

**Deloitte.**



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# Shareholders of the Project

Project Partner



*TOBB Telecommunications  
Council*

Project Consultant



*Deloitte Consulting*

Project Data Providers



*BTK – Information and  
Communication Technologies  
Authority*



*Context*

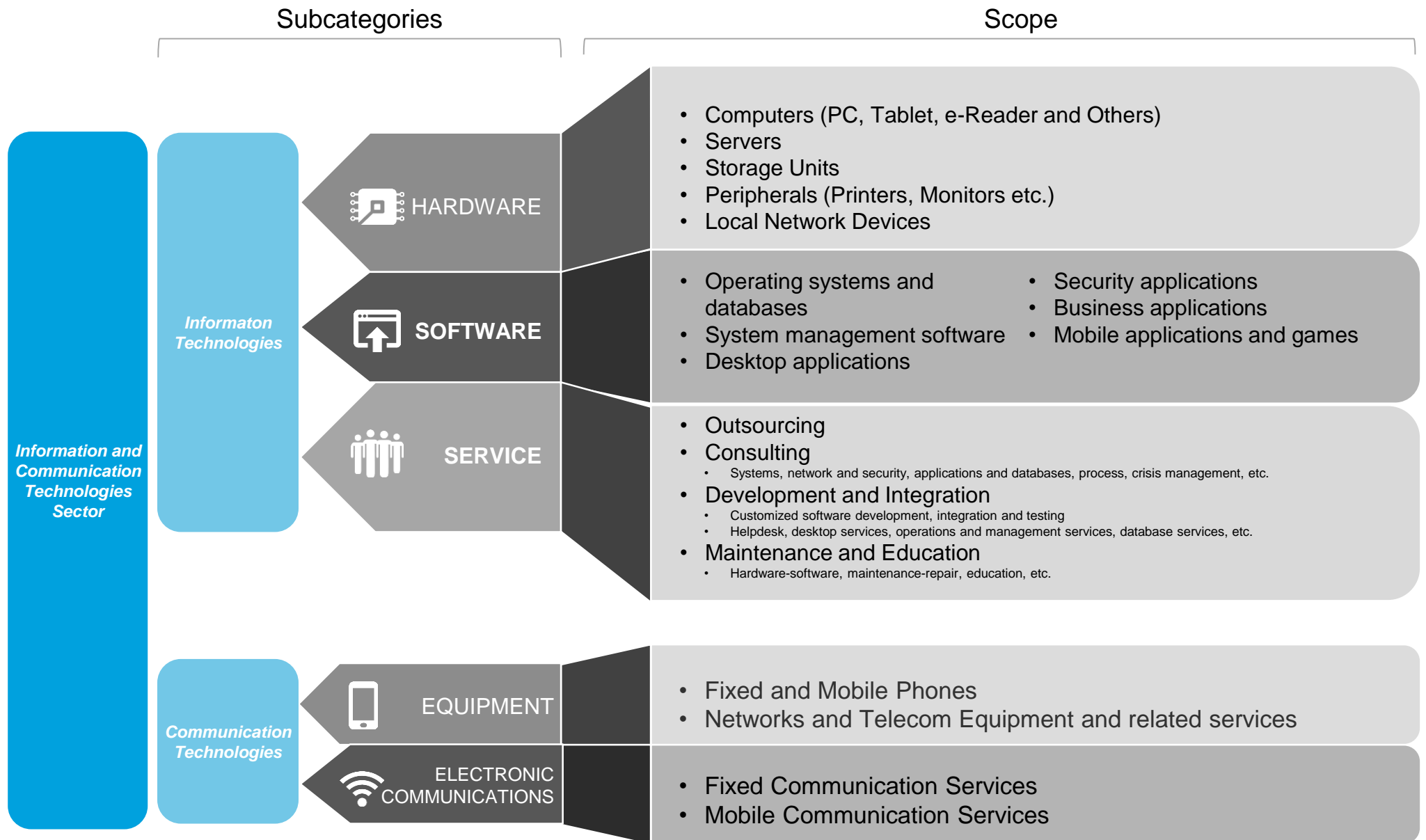


*SASAD – Defense and  
Aerospace Industry  
Manufacturers Association*

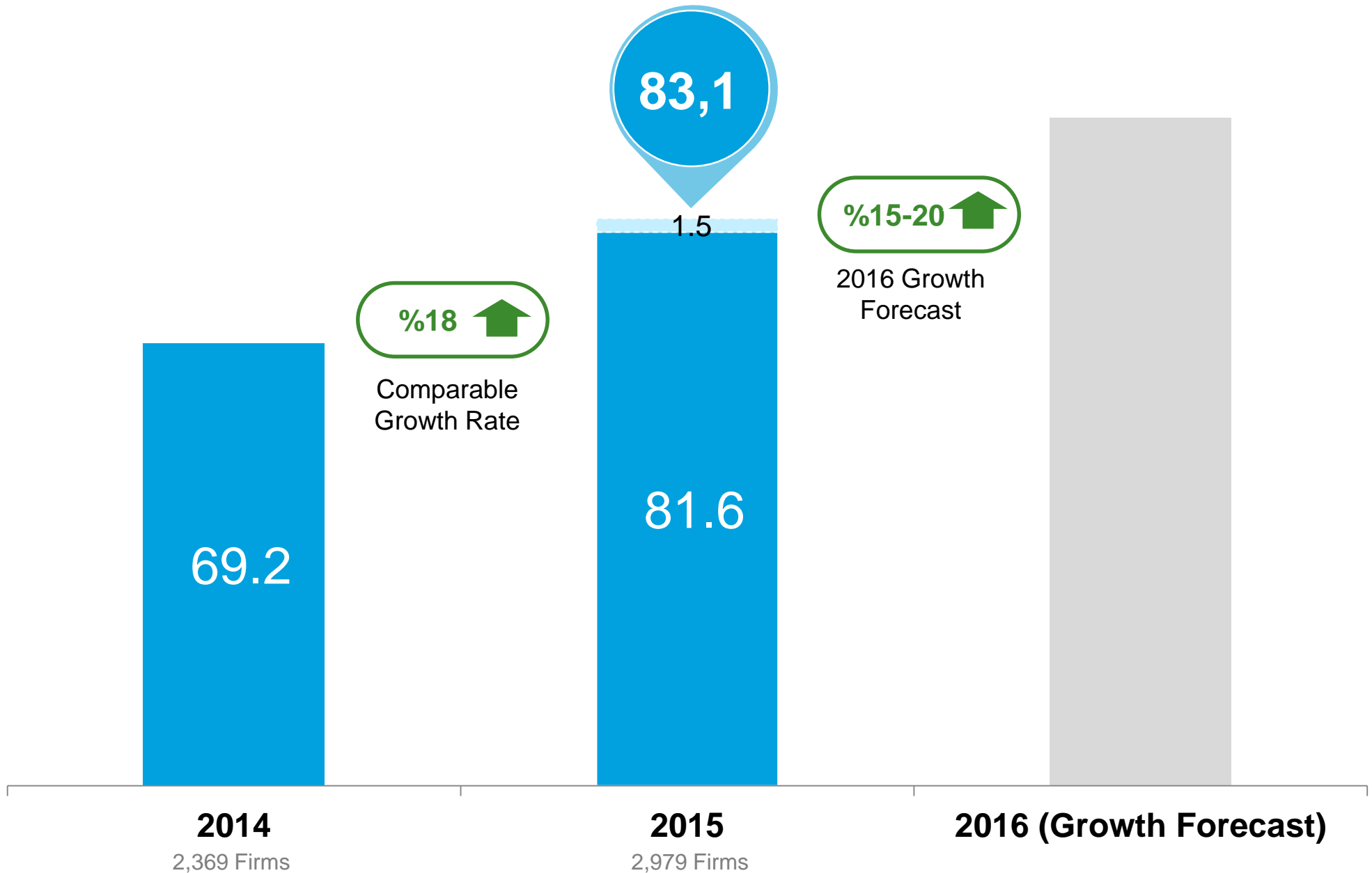


*TGBD – Association of  
Technoparks*

# Project Scope



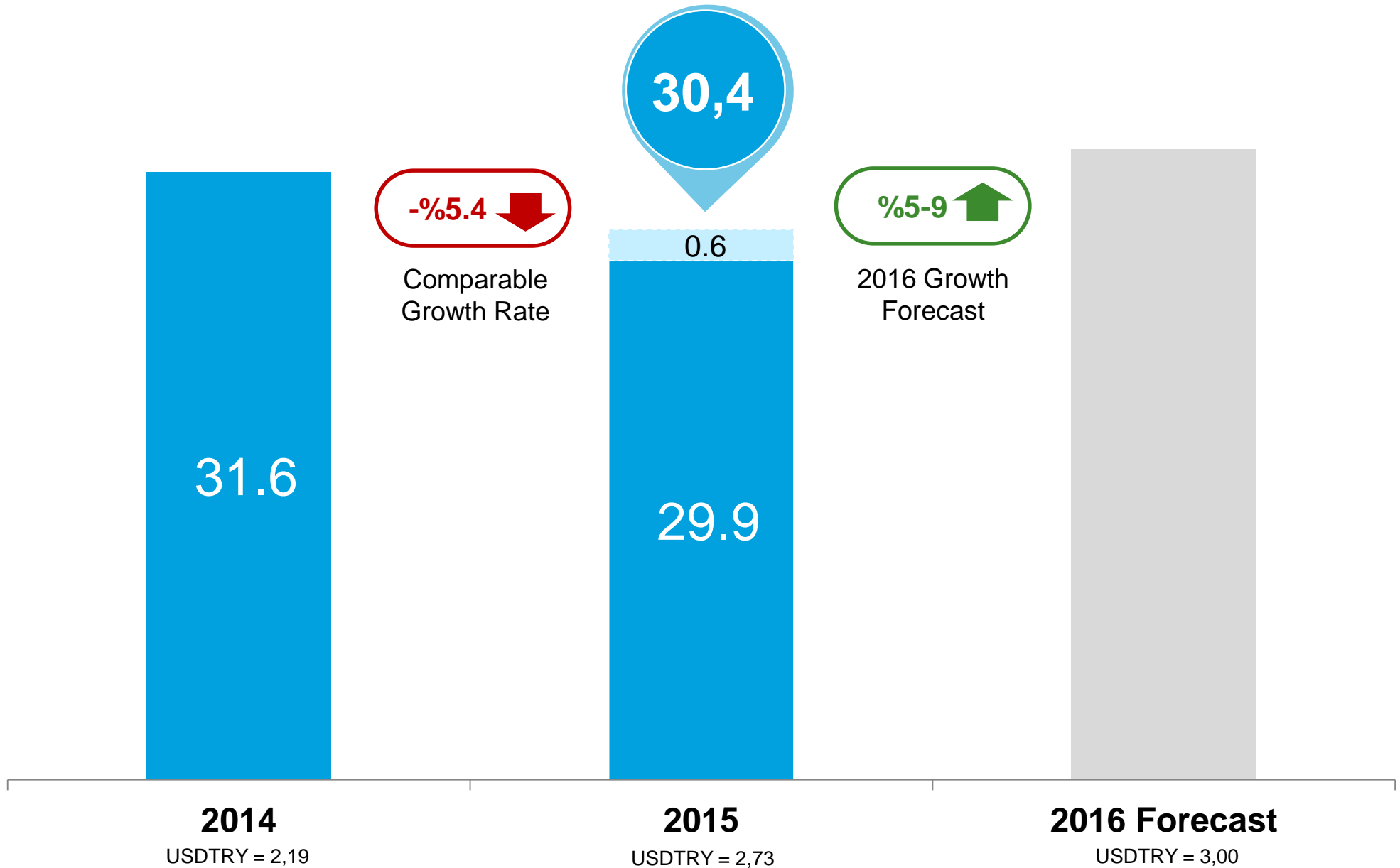
# Total ICT market size in Turkey (bn TRY)



Note: 2014 data is updated  
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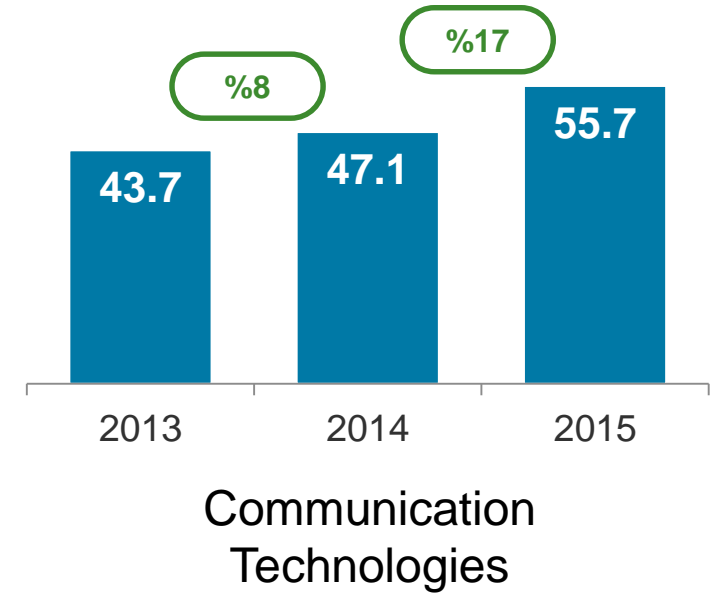
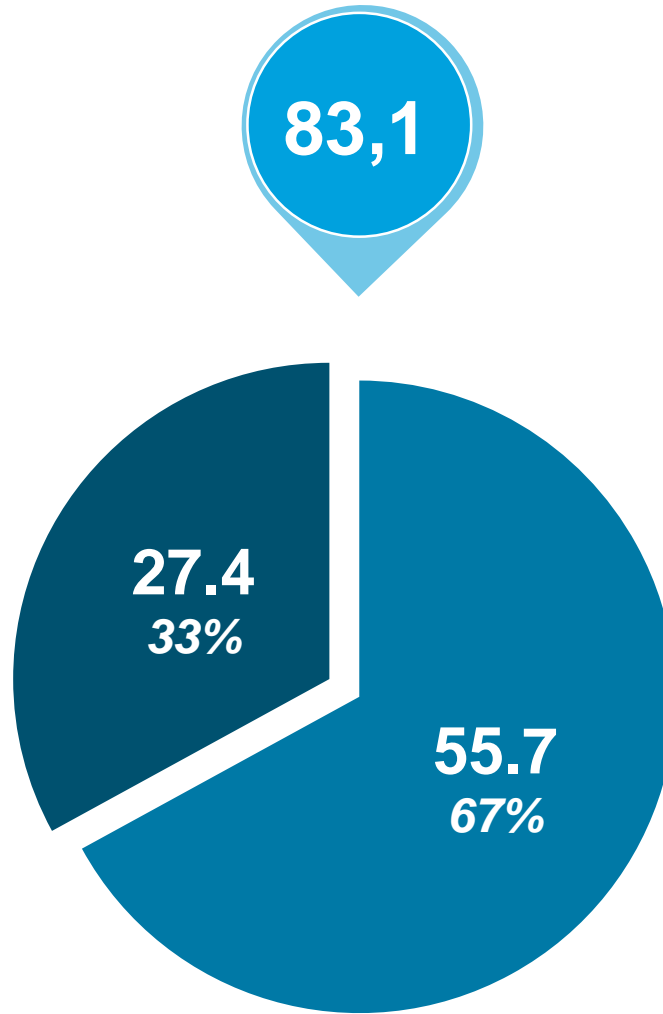
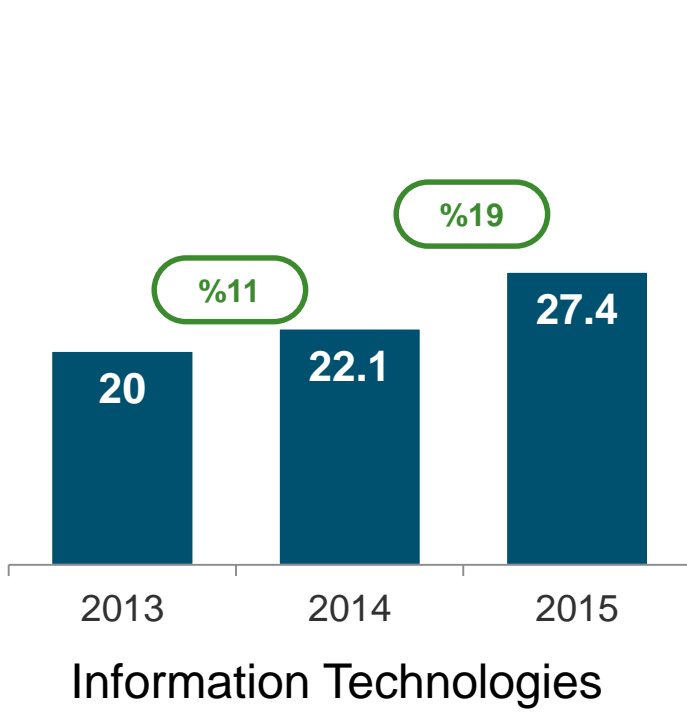
Size of companies added in 2015

# Total ICT market size in Turkey (bn USD)



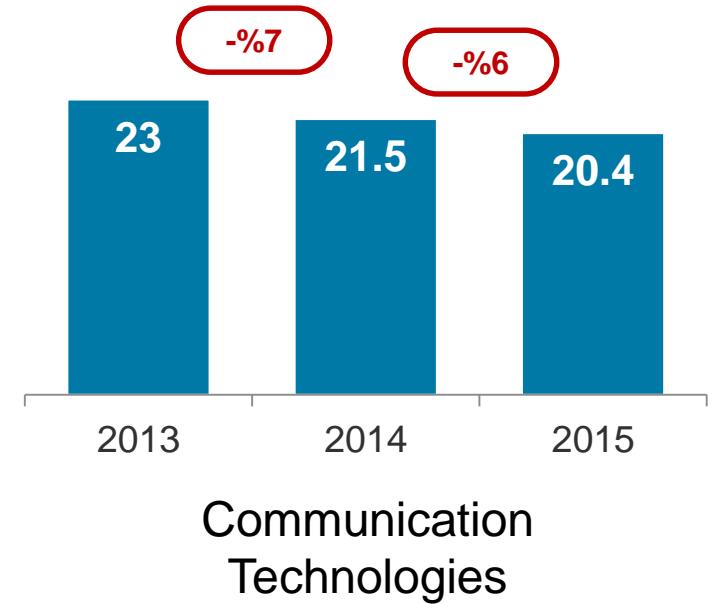
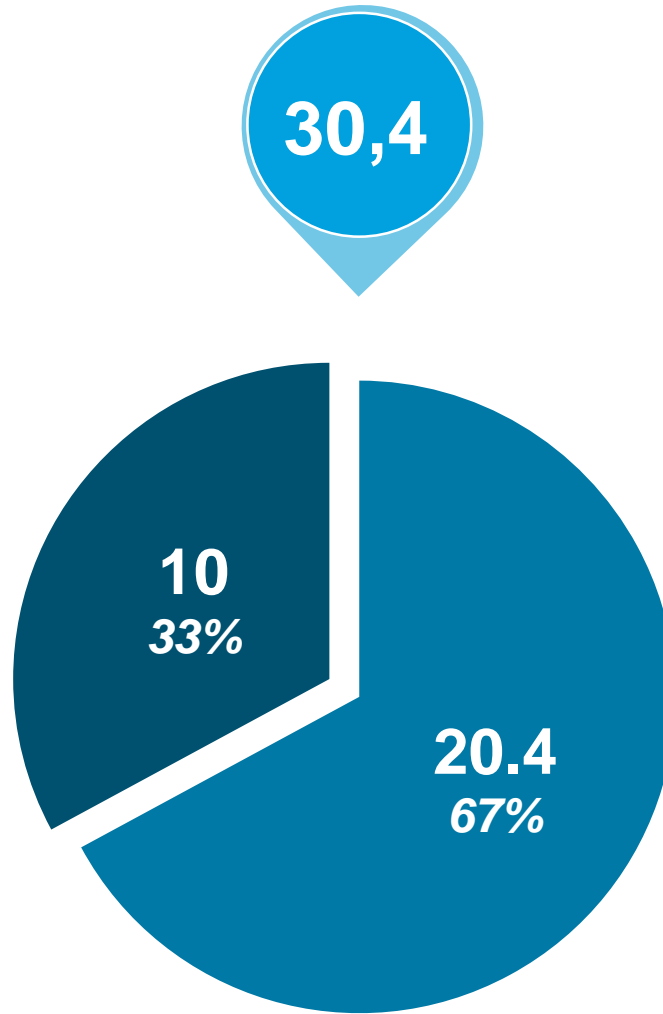
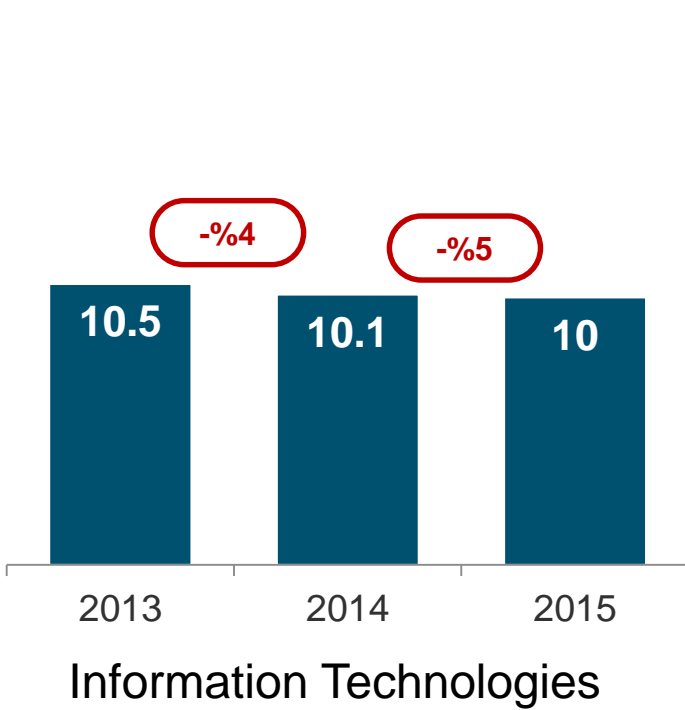
Note: 2014 data is updated.

# ICT market breakdown (bn TRY)



**%** = Comparable % Change

# ICT market breakdown (bn USD)

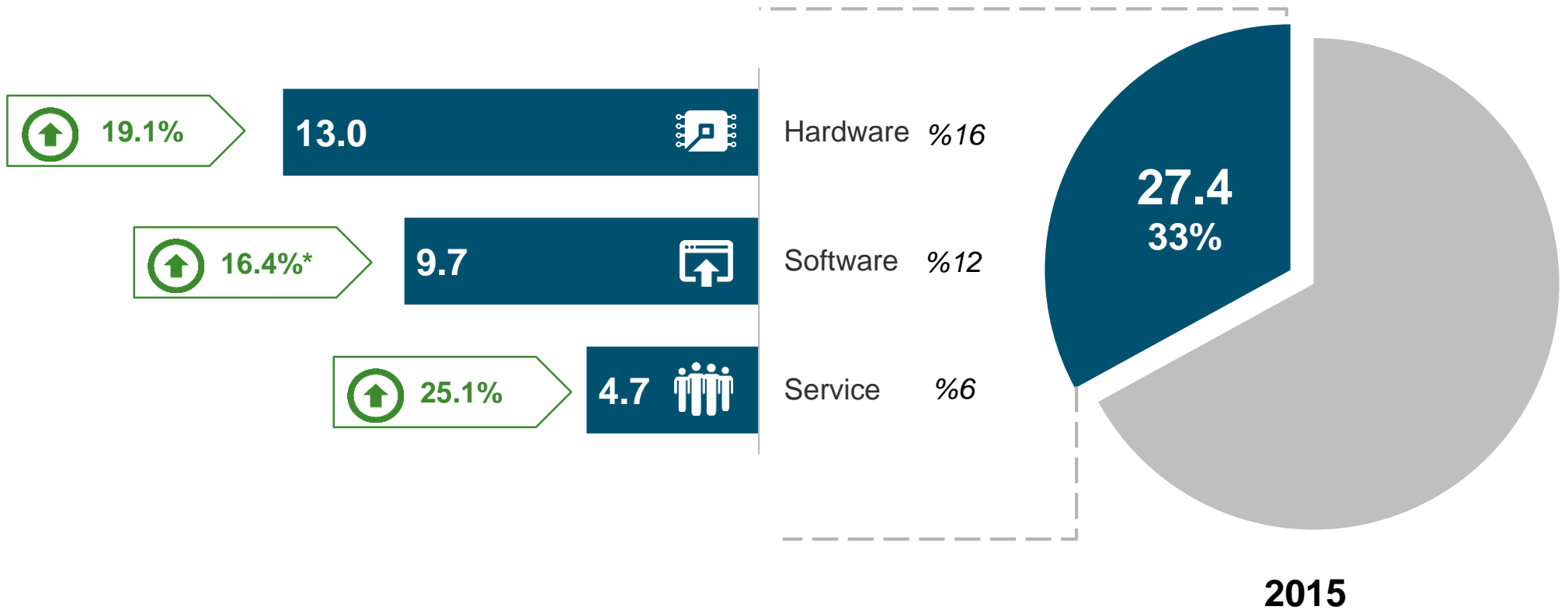


**%** = Comparable % Change



# Breakdown of Information Technologies Sector

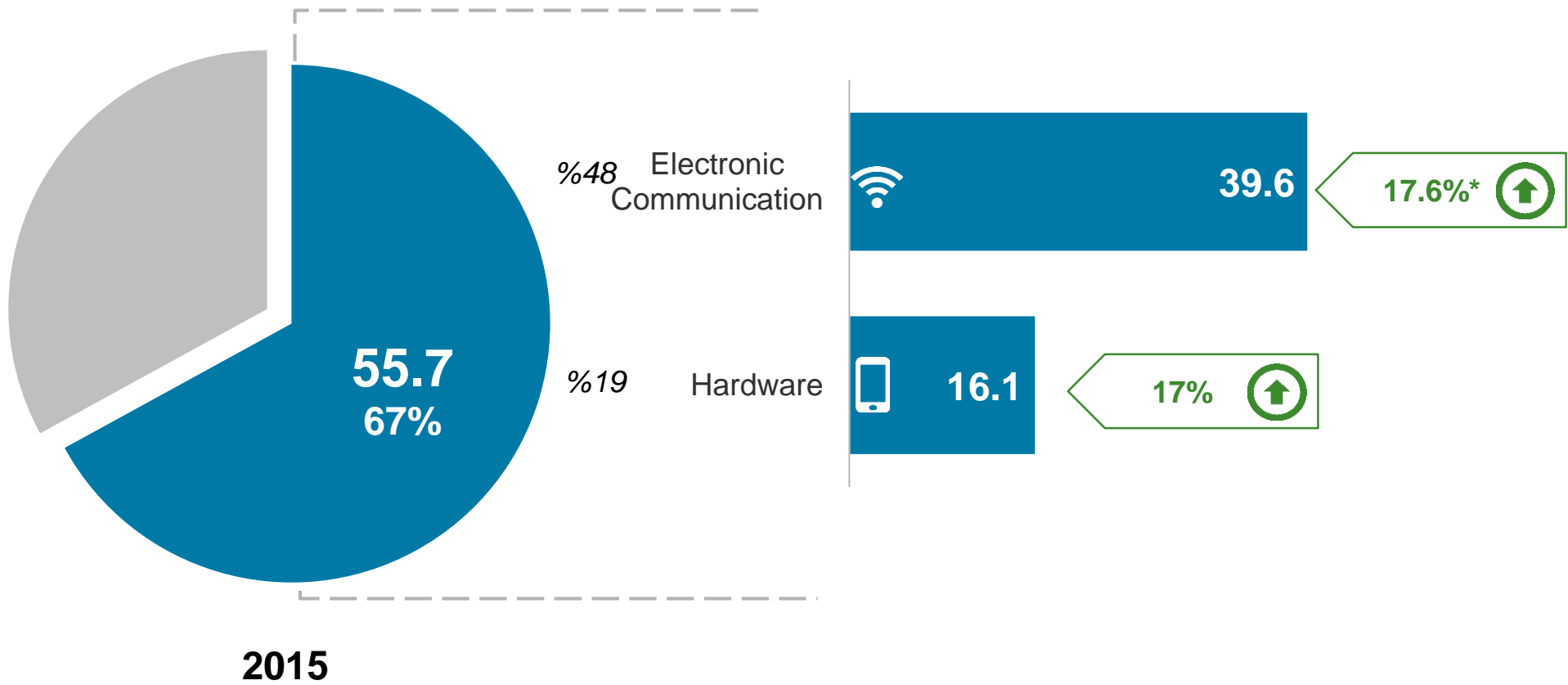
(bn TRY)



**%** = Comparable % Change

\*Note: 2014 data is updated

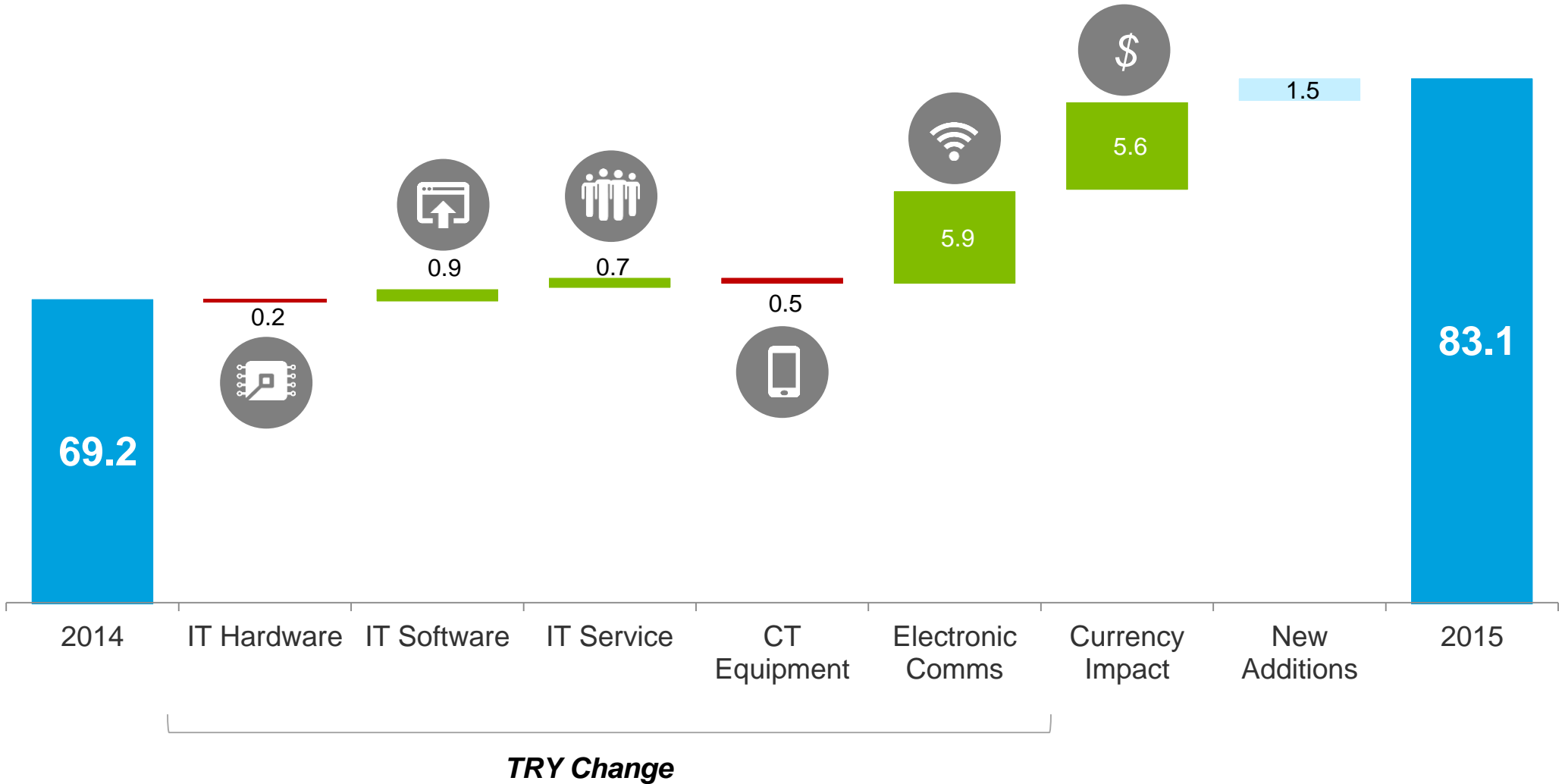
# Breakdown of Communication Technologies Sector (bn TRY)



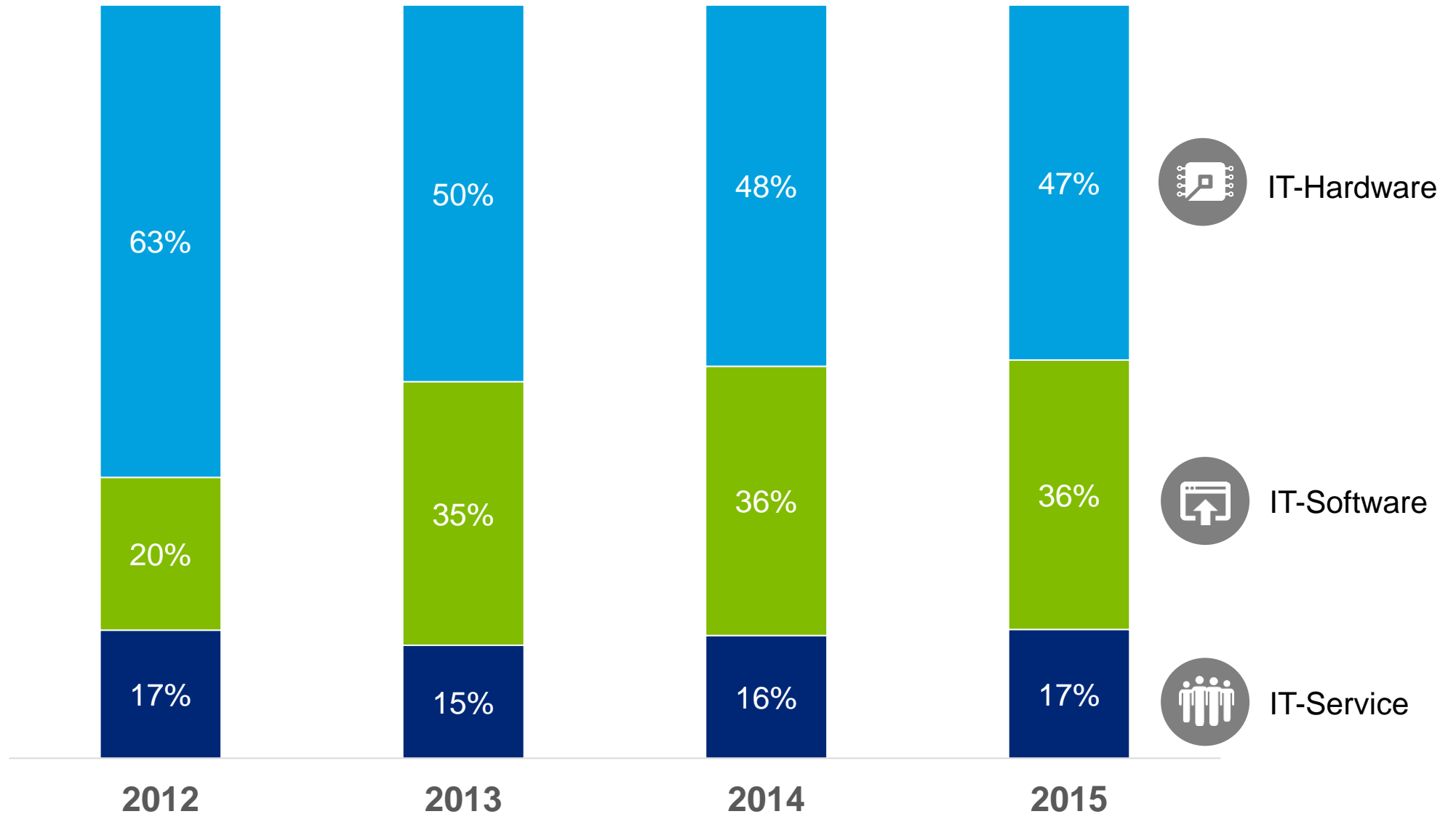
**%** = Comparable % Change

\*Note: 2014 data is updated

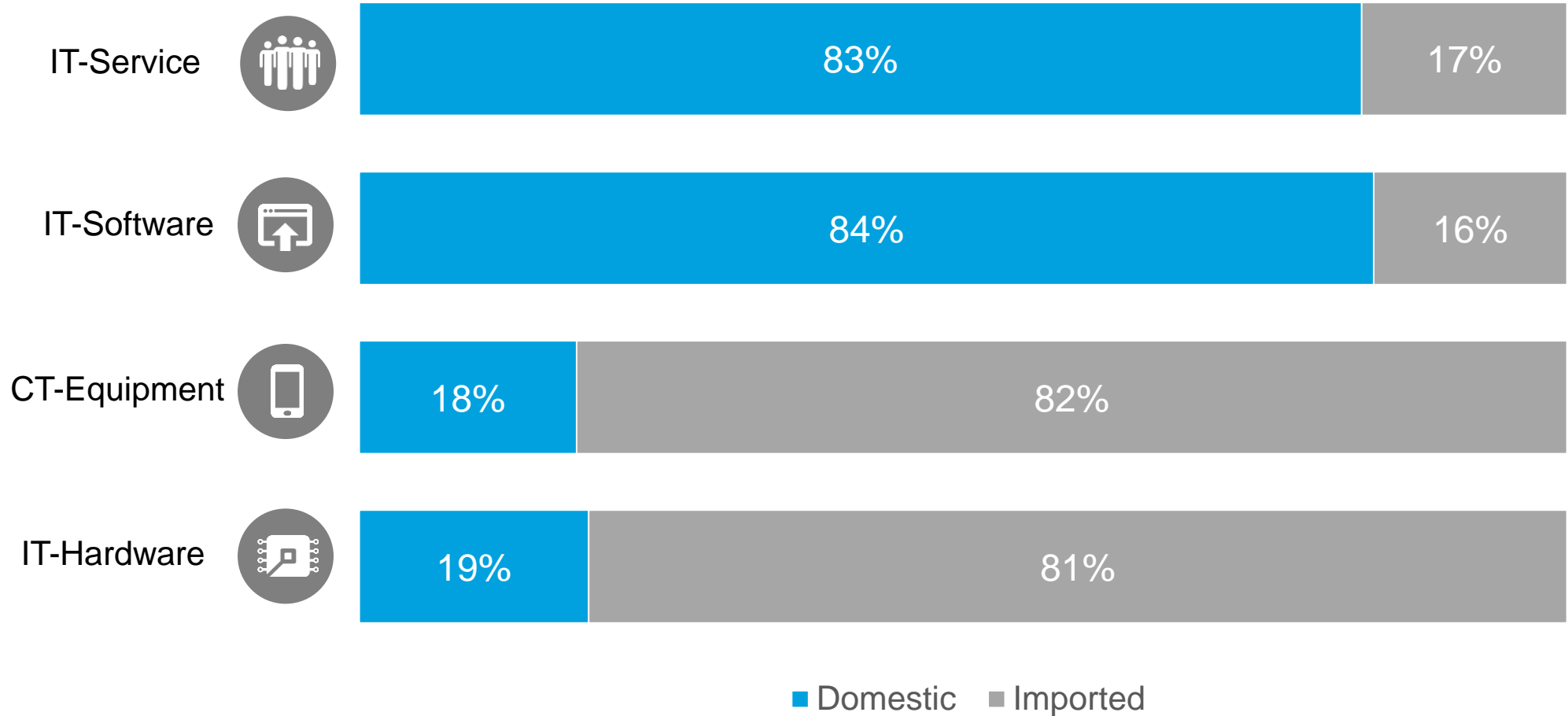
# Sources of ICT market growth



# Shares of subsectors over time



# Origins of product and services



# Technoparks in Turkey - 2015



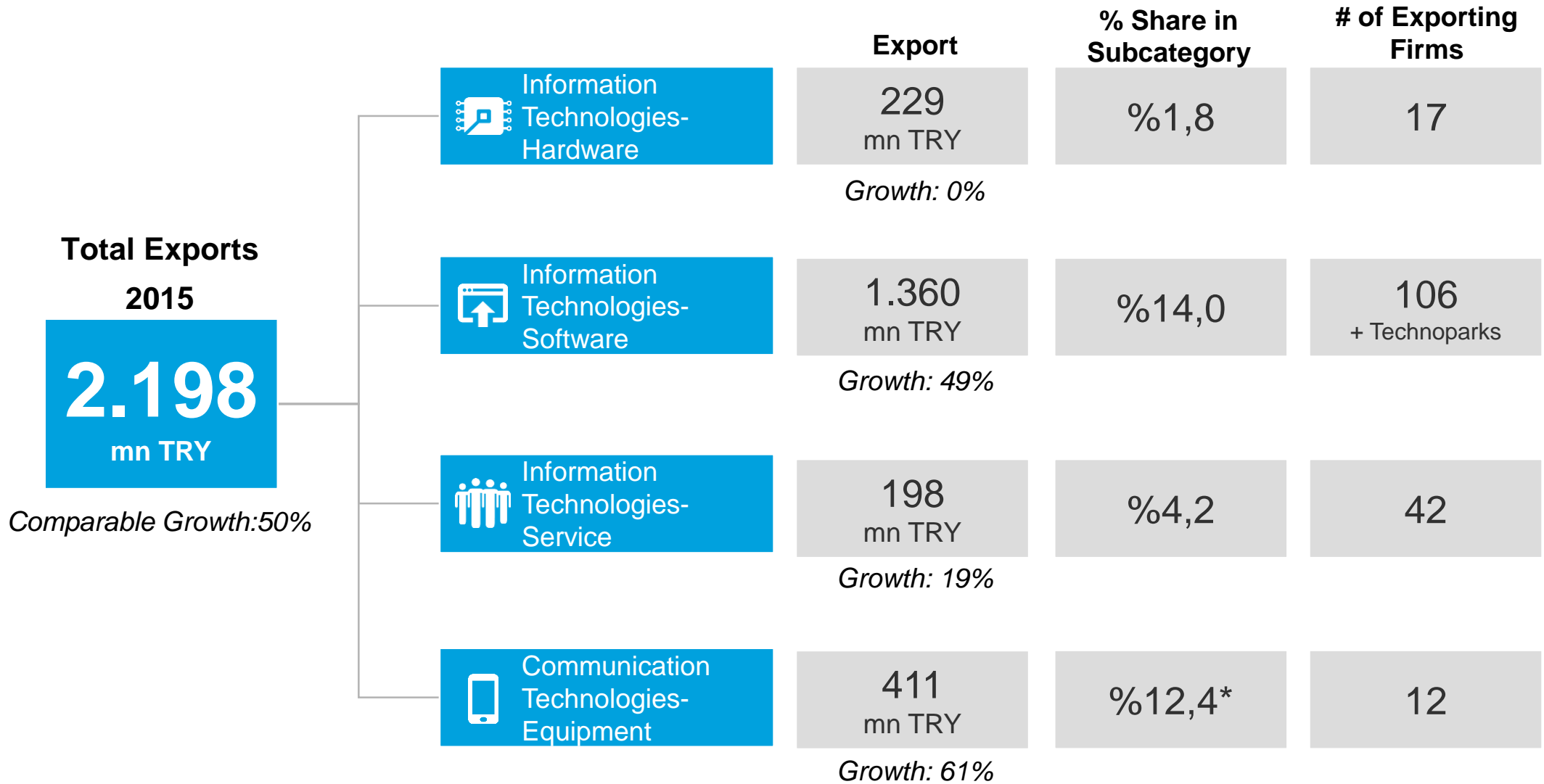
IT Companies	2014**	2015	% Change
# of Companies	1.782 (313)	1.967	%10,4
# of Employees	25.951 (1.540)	29.161	%12,4
Total Revenues (TRY mn)	5.171 (155)	6.326	%22,3
Total Exports (TRY mn)	699 (29,9)	890	%27,4

\*Including data from technoparks that are newly added in 2015

\*\*Numbers in parentheses reflect 2014 data of technoparks that were newly added in 2015.

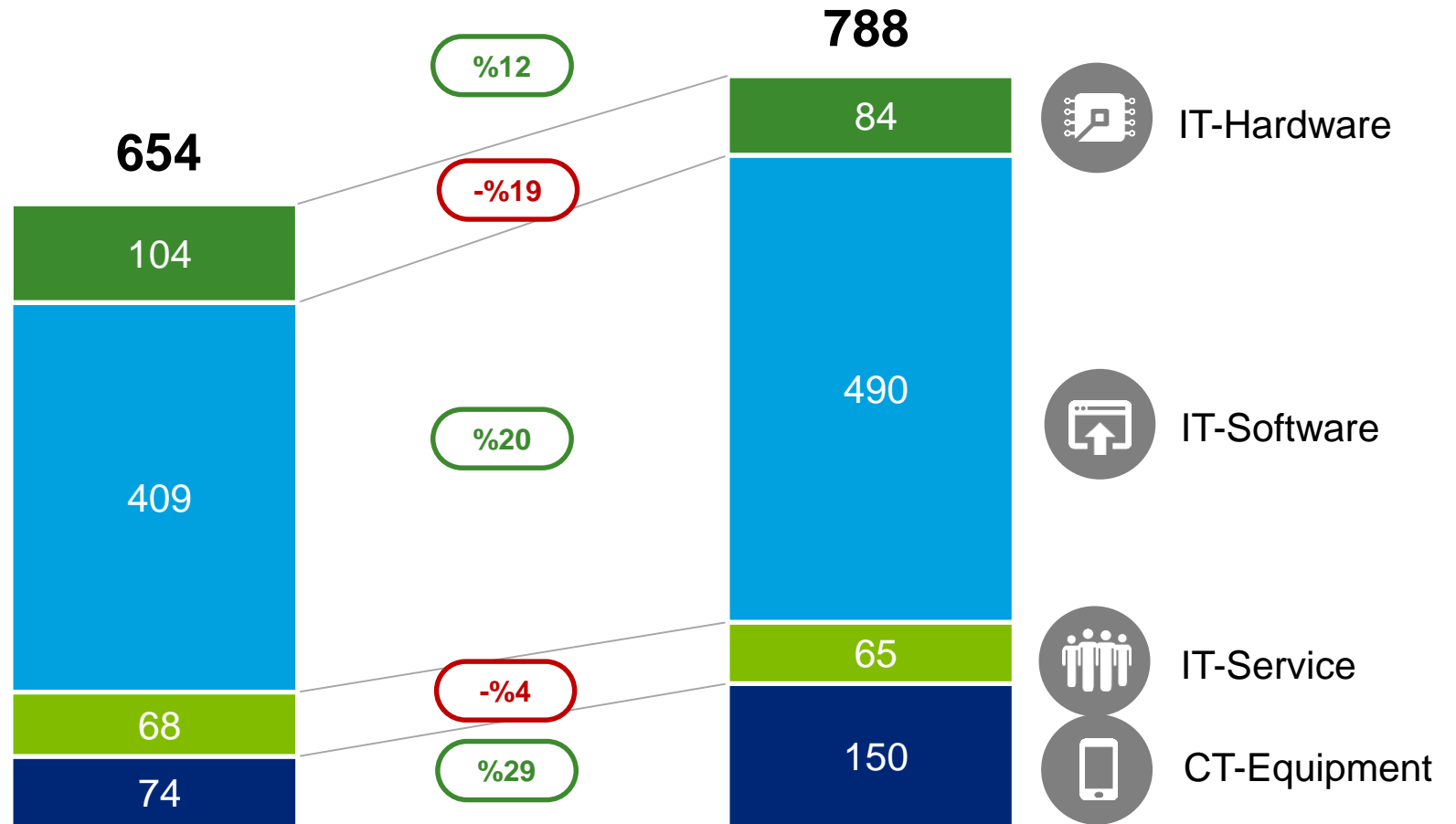
# ICT Exports

(mn TRY)



\*Mobile phones are excluded.

# ICT Exports (mn USD)



**%** = Comparable Change Rate



# Export Destinations

**Countries exported the most (2015)\***



**Azerbaijan**



**USA**



**Turkish  
Republic of  
Northern Cyprus**



**United Kingdom**



**United Arab  
Emirates**

Based on responses of 51 firms, first 5 countries that are exported the most

# Employment (k persons)

107 k person  
(2014)\*

**Total Employment  
2015**

**113**  
k Persons

Growth: %2,2

Information  
Technologies

Communication  
Technologies

Employment

% Share

% Comparable  
Growth

74,4

%66

%3,6

38,8

%34

-%0,1



**Female employees<sup>1</sup>**



**University graduates<sup>1</sup>**



**R&D employees<sup>1</sup>**

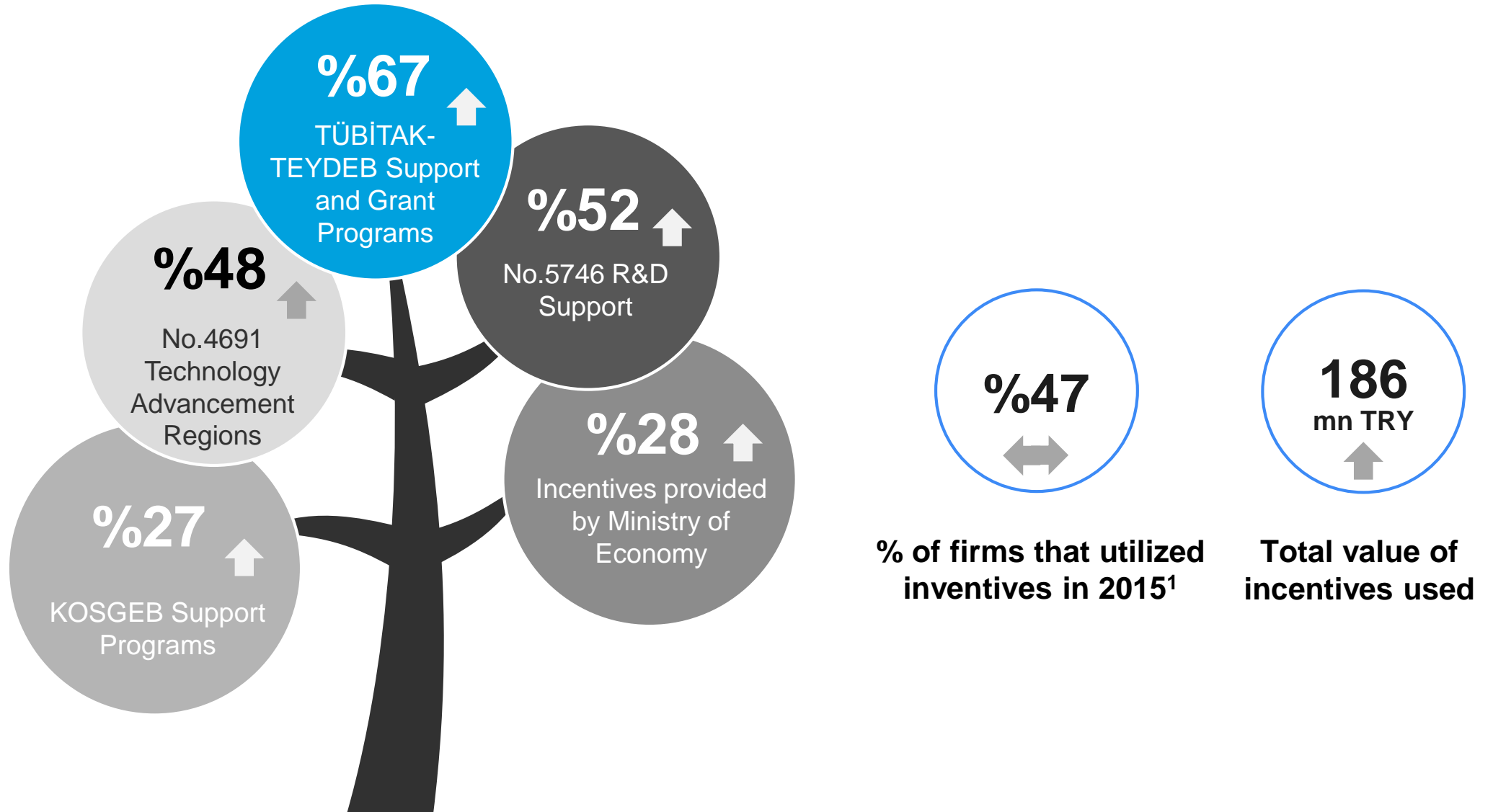


**Subcontractors<sup>1</sup>**

<sup>1</sup> Based on survey responses and BTK data

\* Note: 2014 data is updated.

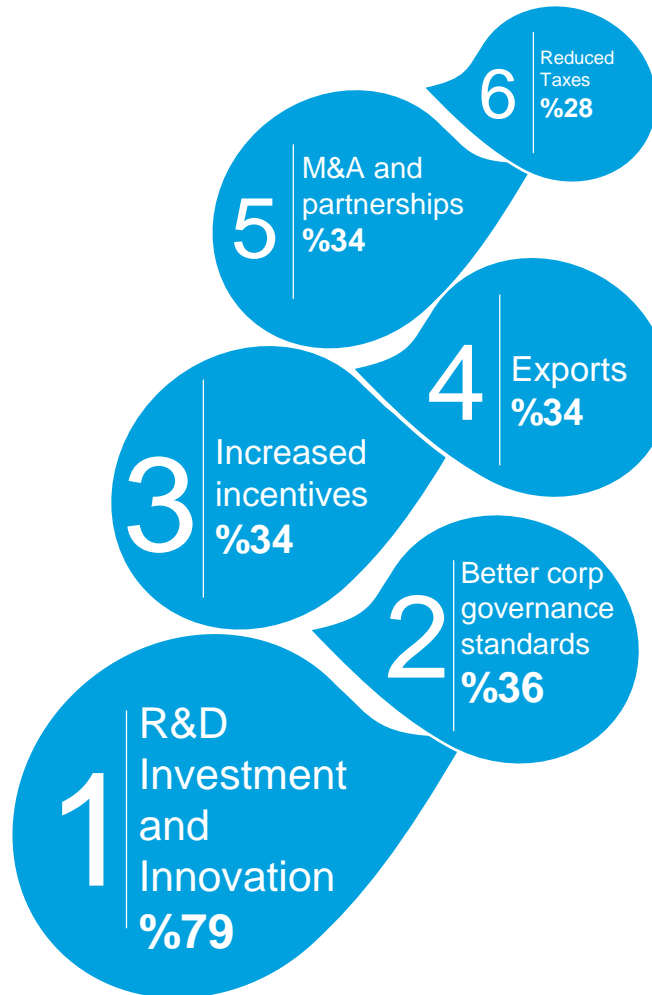
# Utilized Incentives



<sup>1</sup> Based on responses of 46 firms answering the question

# Major factors driving growth

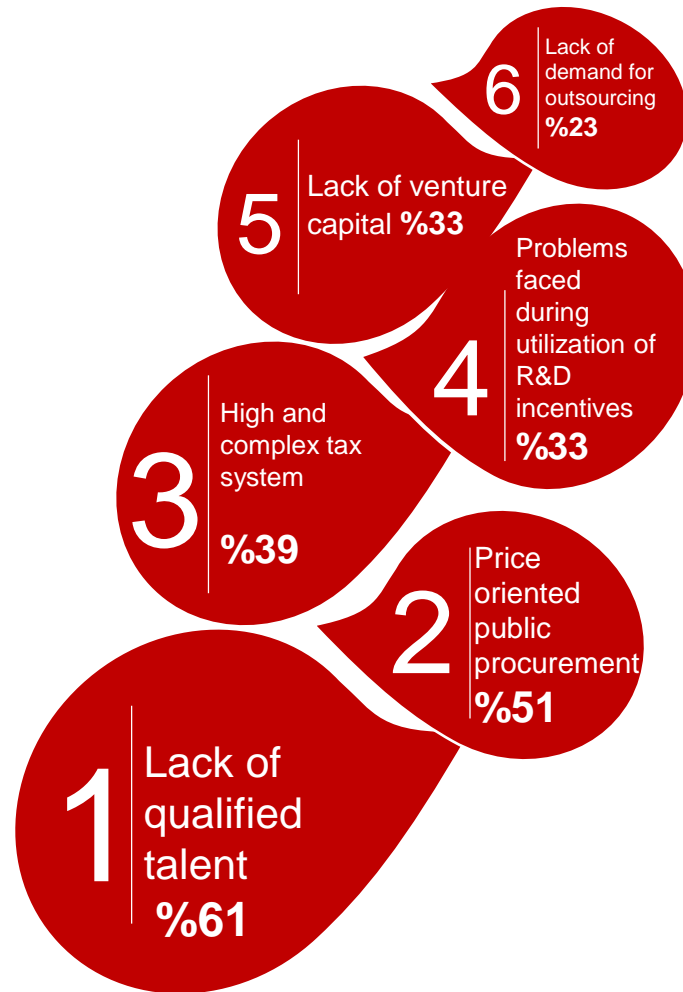
Q. Please list 3 major factors that will drive growth in 2016:



Criteria: 98 firms that responded to the question

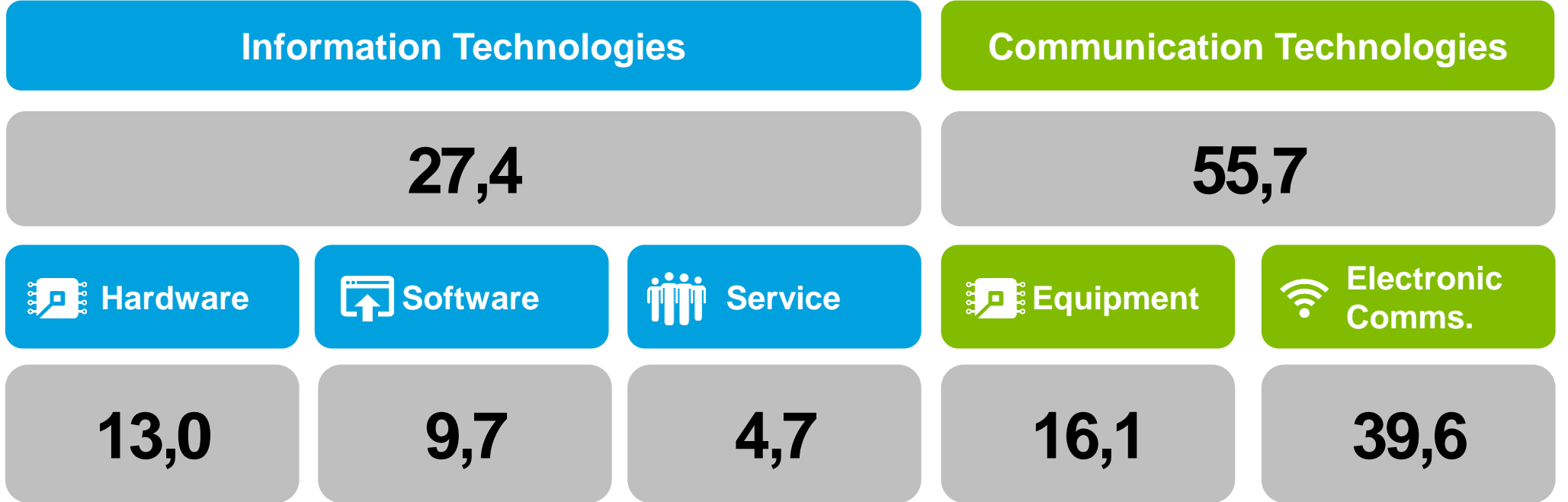
# Key issues in the ICT sector

Q. What are the 3 major problems faced in the sector?

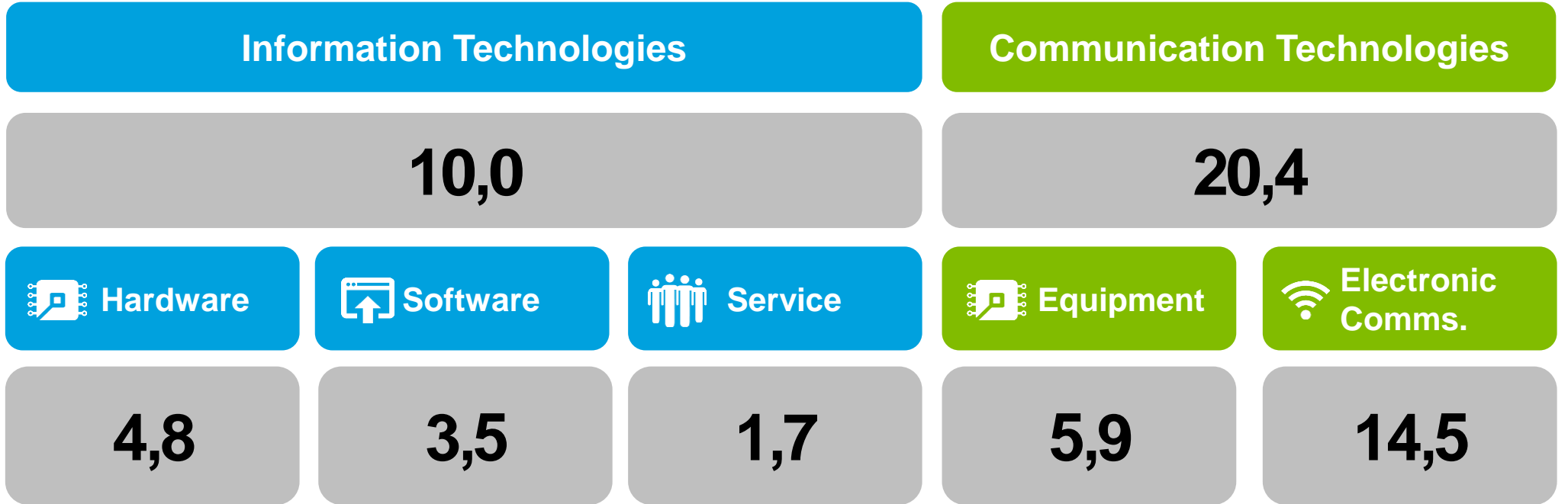


Criteria: 98 firms that responded to the question

# 2015 ICT Market in Turkey (bn TRY)



# 2015 ICT Market in Turkey (bn USD)



# Event Sponsor







## Thank You

We would like to thank  
TOBB Telecommunications Council,  
ICTA, TGBD, Context, SASAD,  
TÜBİSAD members and sector companies for their valuable contributions.

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# Explanations

## 2014 data updates

Source	Data	2014 Data in Original Presentation	2014 Data updated in 2015
Electronic Communications (BTK)	Revenue (bn TRY)	35,5	33,7
	Revenue (bn TRY)	3,5	5,0
Technoparks (TGBD)	Export (mn TRY)	472	669
	# of Employers	19.679	24.411
	# of Companies	1.052	1.469