

Information and Communications
Technology Sector (ICT)
Market Data 2013



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TOTAL SECTOR SIZE

Total market size of the Turkish ICT Sector in 2013

4

SIZES OF SUB-SECTOR CATEGORIES

- Information Technologies→ 1-Hardware 2-Software 3-Services
- Communications Technologies→ 1-Hardware 2-Electronic Communications

5

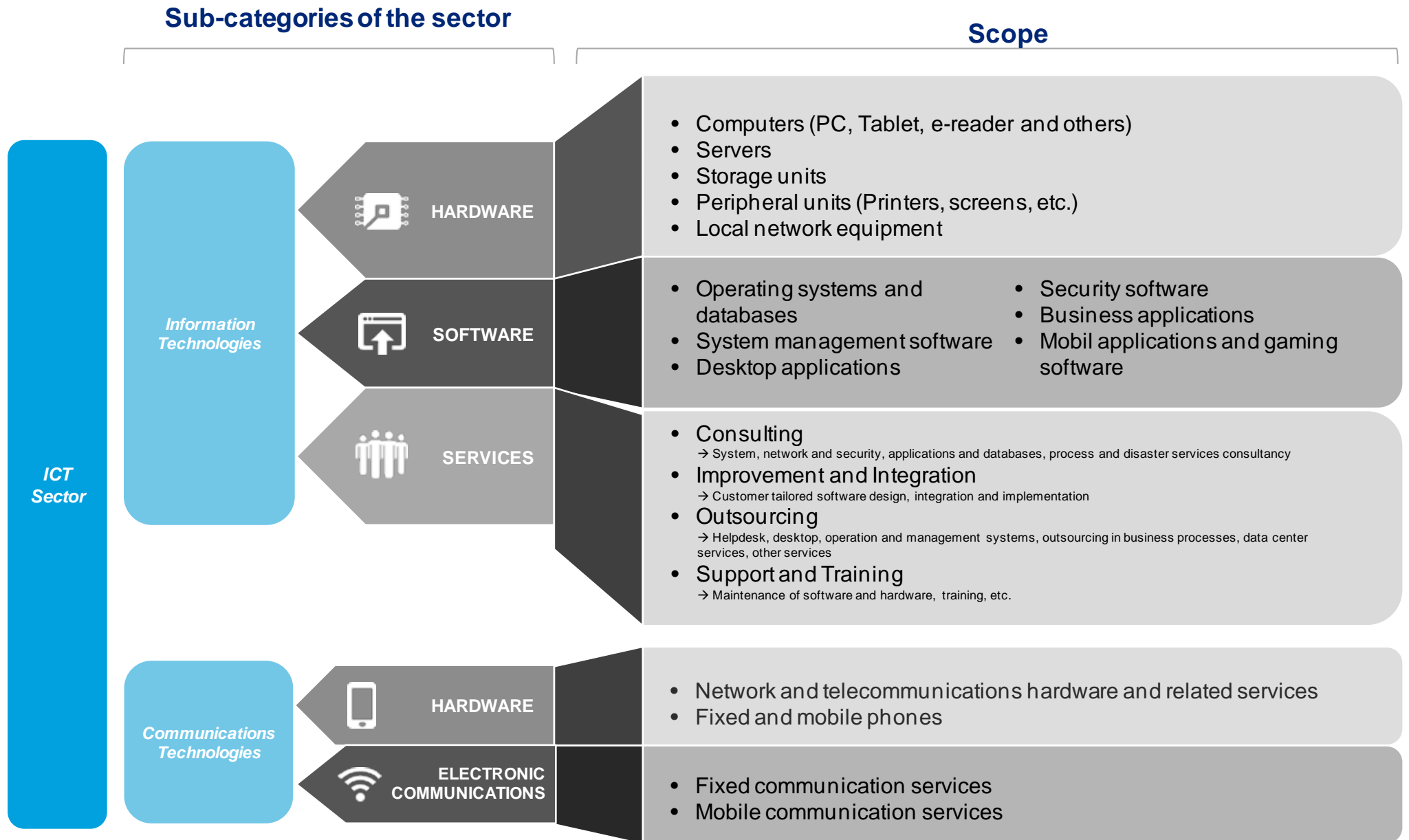
OTHER INDUSTRIAL DATA AND EXPECTATIONS FROM 2014

Export amounts and destinations, incentive types in the sector and total received incentive amount, growth factors and frequently encountered problems in the sector

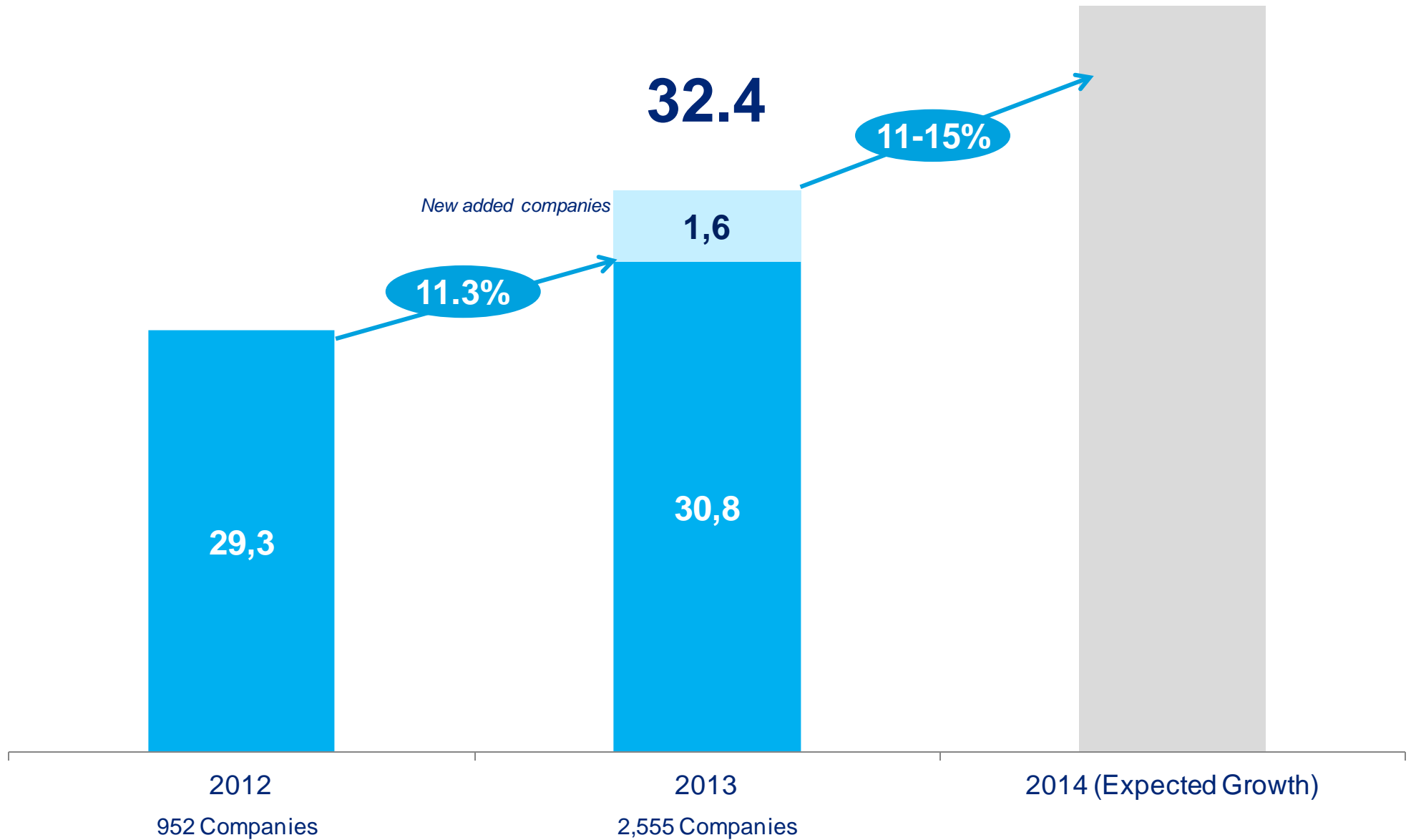
Stakeholders of the study

Project Partner	 <p>TOBB Türkiye Telekomünikasyon Meclisi</p>	<i>TOBB Telecommunications Council</i>
Project Consultant		<i>Deloitte Consulting</i>
Project Data Partners	 <p>BTK BİLGİ TEKNOLOJİLERİ VE İLETİŞİM KURUMU</p>	<i>Information and Communication Technologies Authority</i>
	 <p>Türkiye Cumhuriyeti Bilim, Sanayi ve Teknoloji Bakanlığı</p>	<i>Ministry of Science, Industry and Technology General Directorate of Technoparks</i>
		<i>OPR & Context</i>
		<i>SASAD-Defence and Aerospace Industry Manufacturers Association</i>
Database Partner		<i>Mindstation</i>

Scope of the study

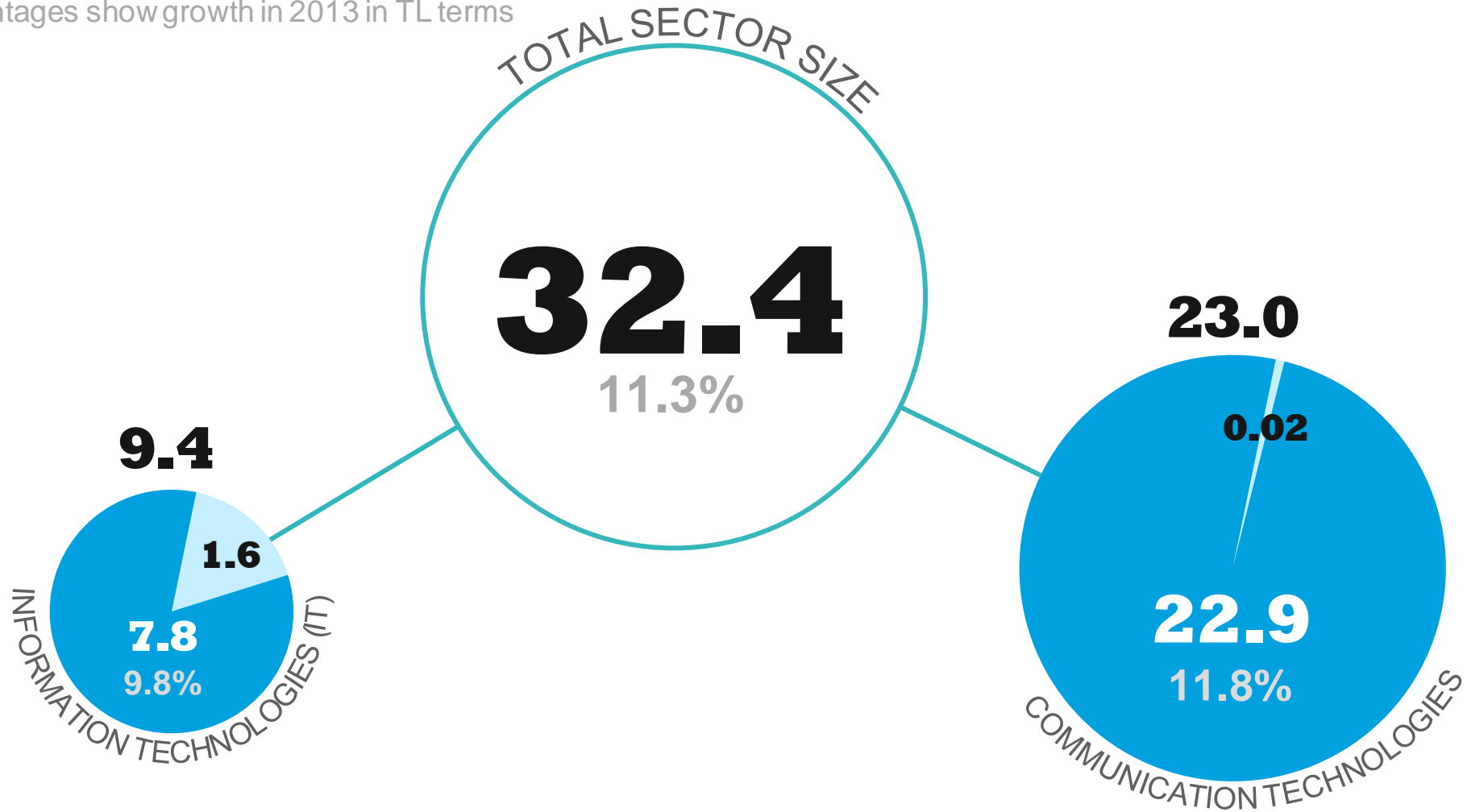


Total sector size (USD bn)



Information and Communication Technologies breakdown (USD bn)

Percentages show growth in 2013 in TL terms

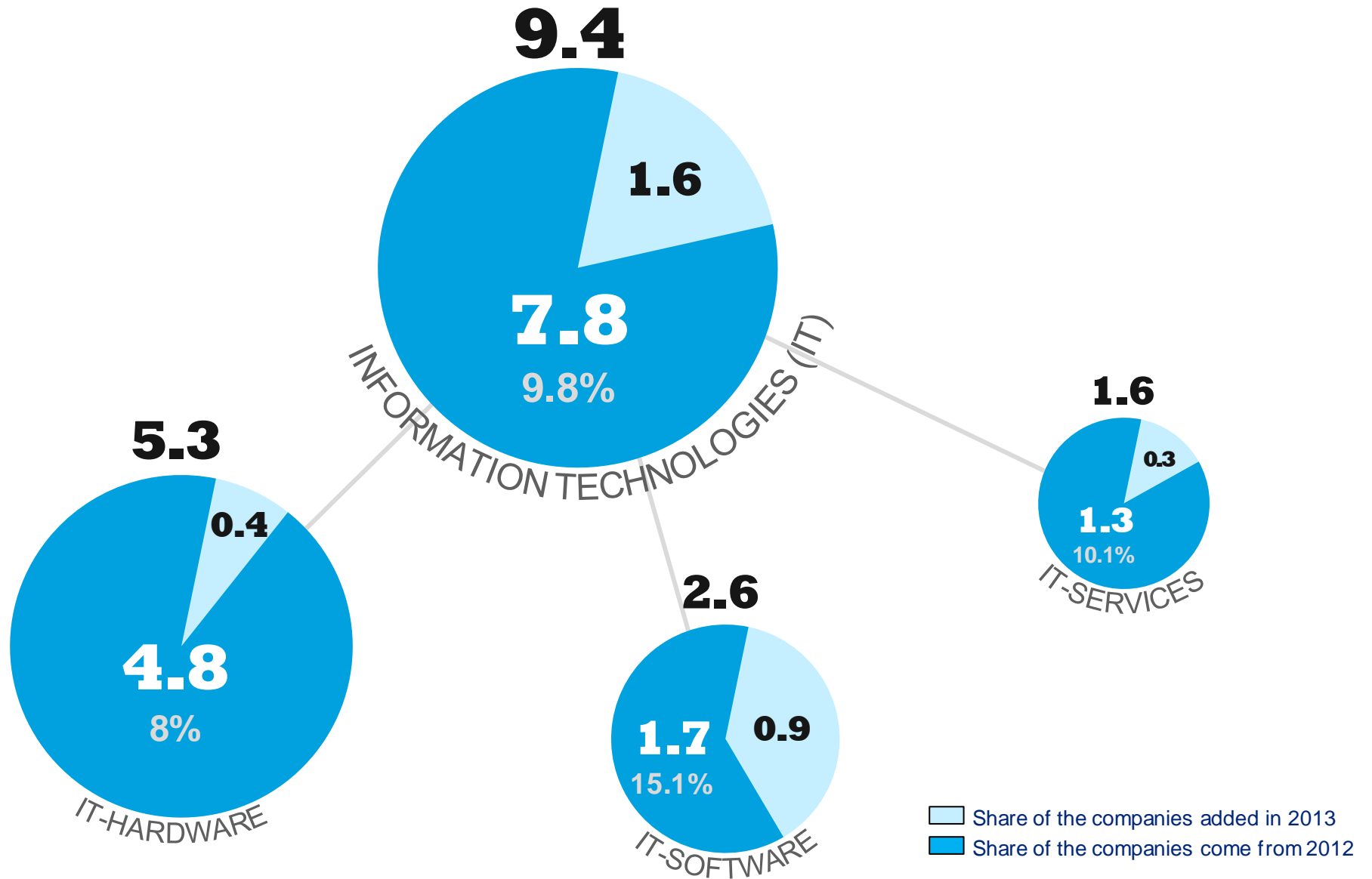


- Share of the companies added in 2013
- Share of the companies come from 2012

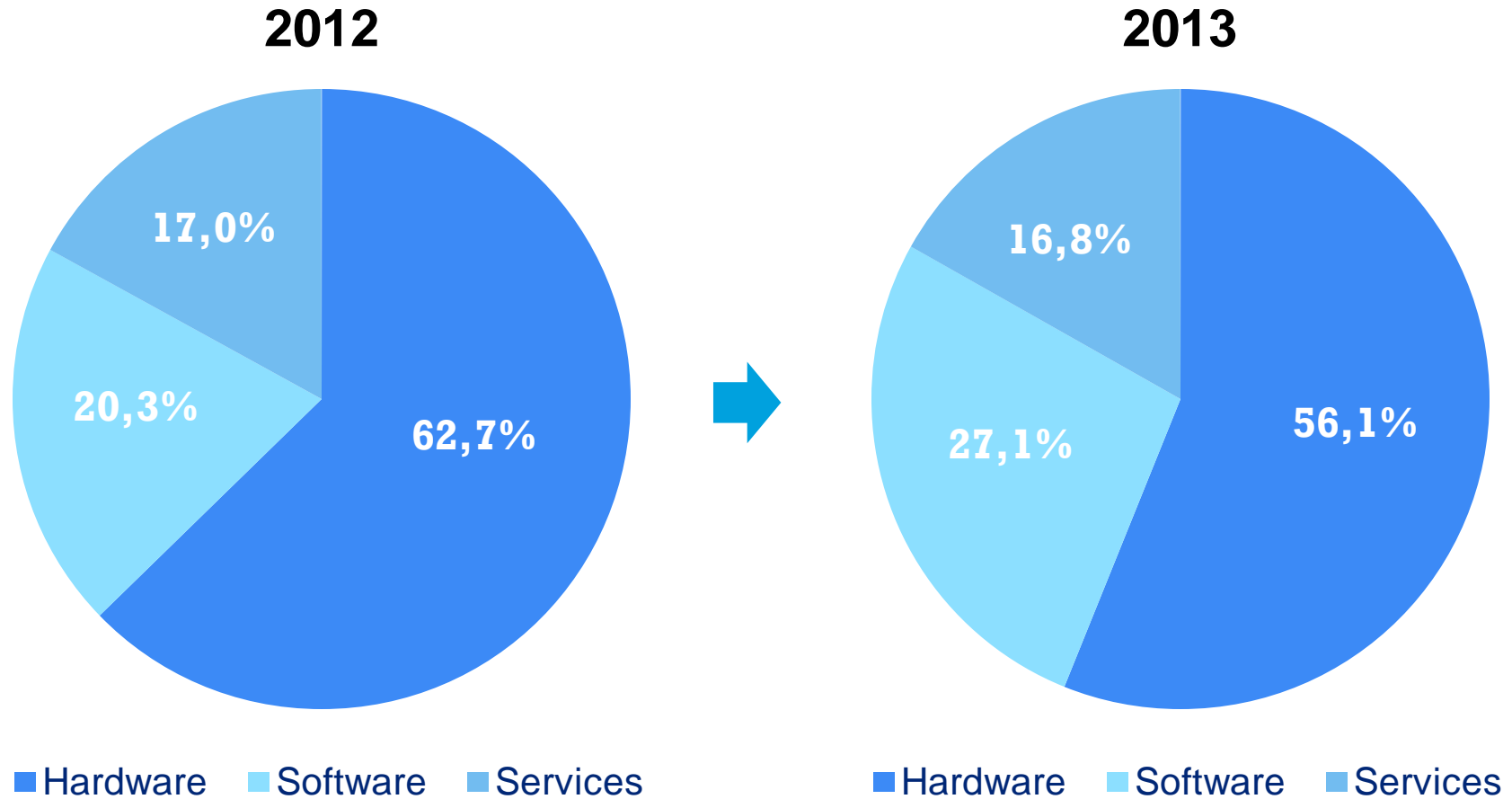
Bubble sizes are proportional
 USD=TL1.90 (2013), rounded components may not add up to the rounded sums

Categories of IT Sector (USD bn)

Percentages show growth in 2013 in TL terms

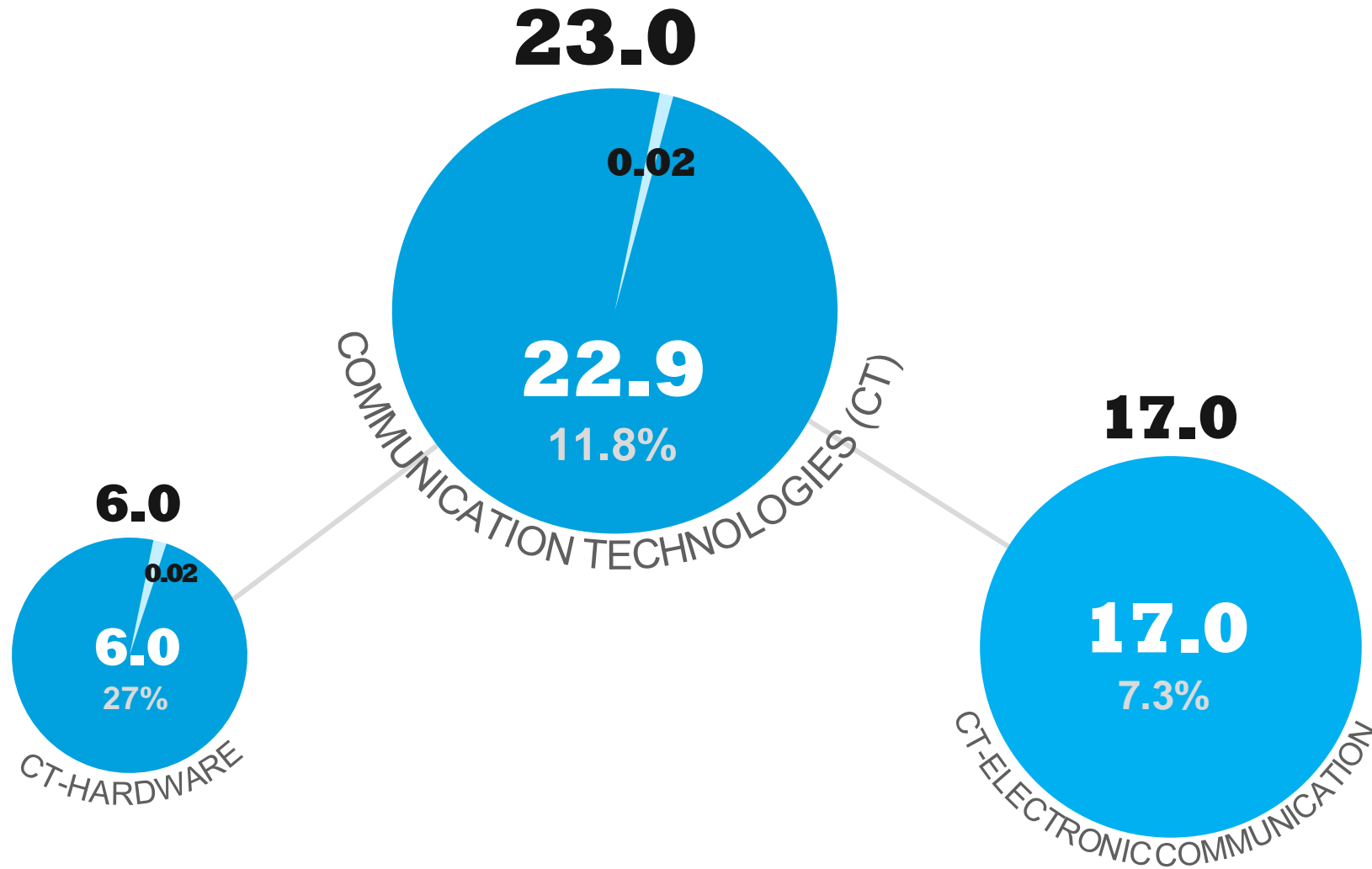


Breakdown of Information Technologies categories



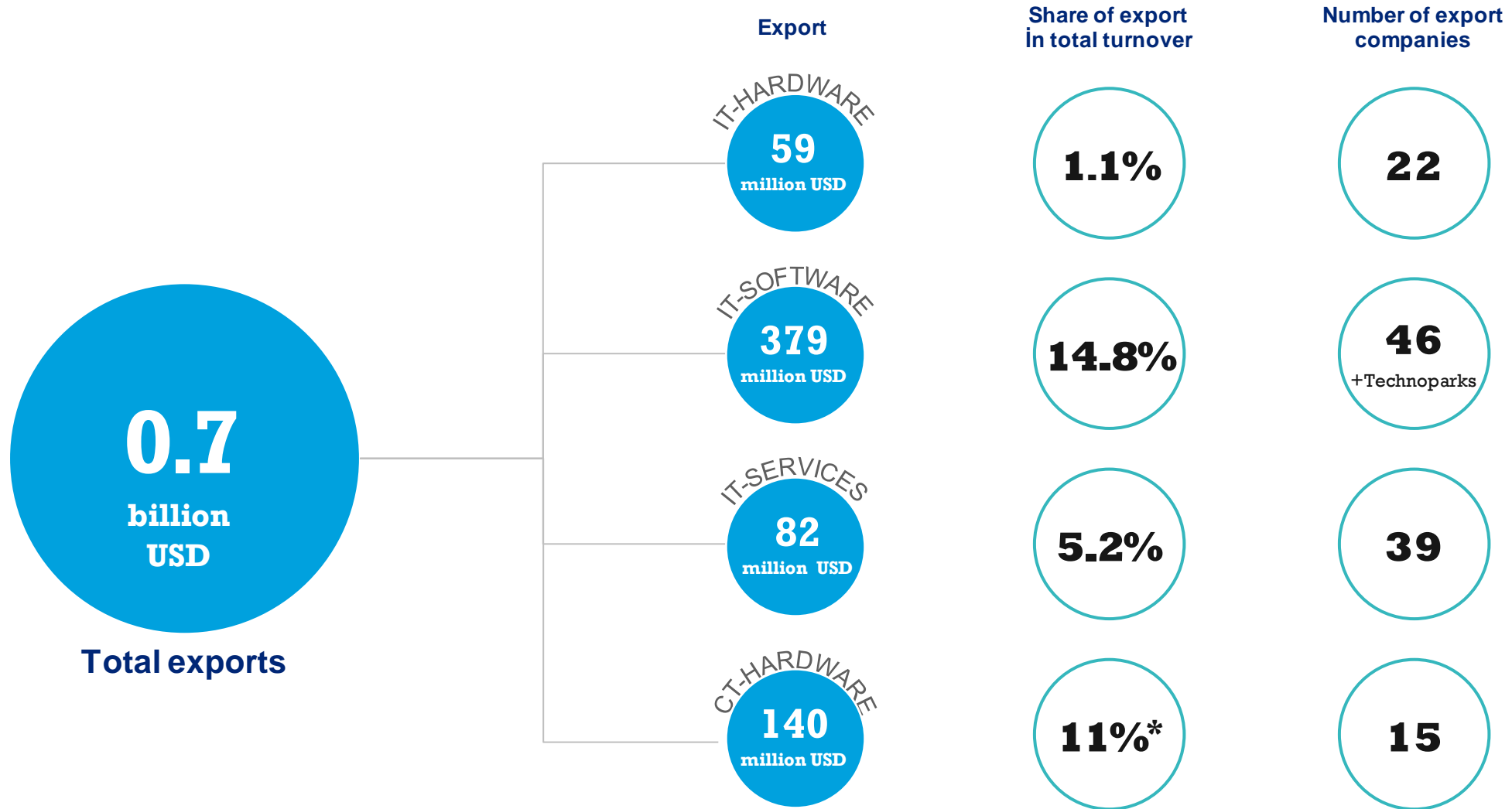
Categories of Communication Tech. Sector (USD bn)

Percentages show growth in 2013 in TL terms



- Share of the companies added in 2013
- Share of the companies come from 2012

Exports

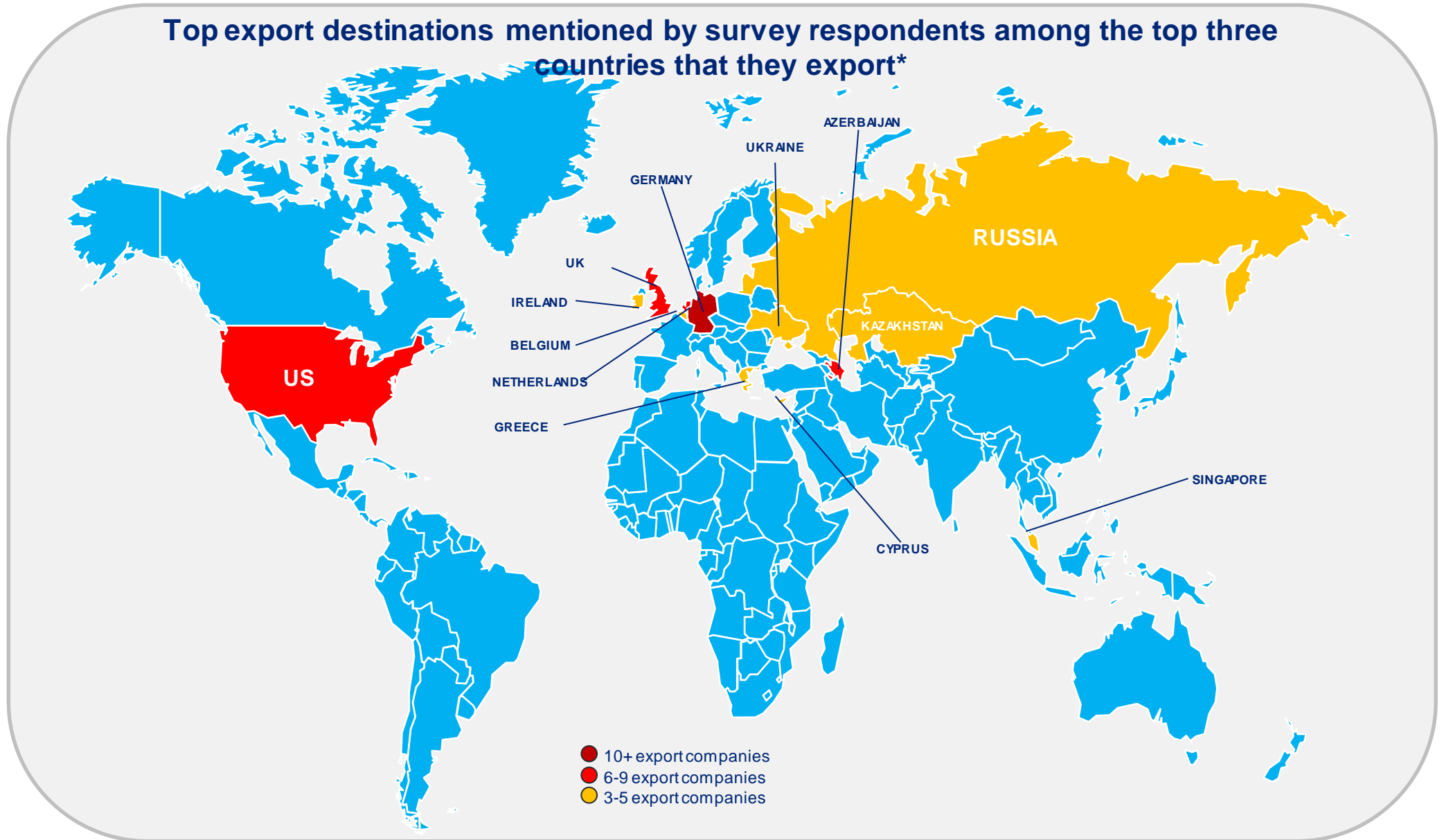


*Mobile phones are excluded while calculating the percentage.

Base: 200 companies (Survey respondent companies or companies whose data are collected via direct communication, Technopark firms, SASAD members; including non-exporters USD=TL1.90 (2013), rounded components may not add up to the rounded sums

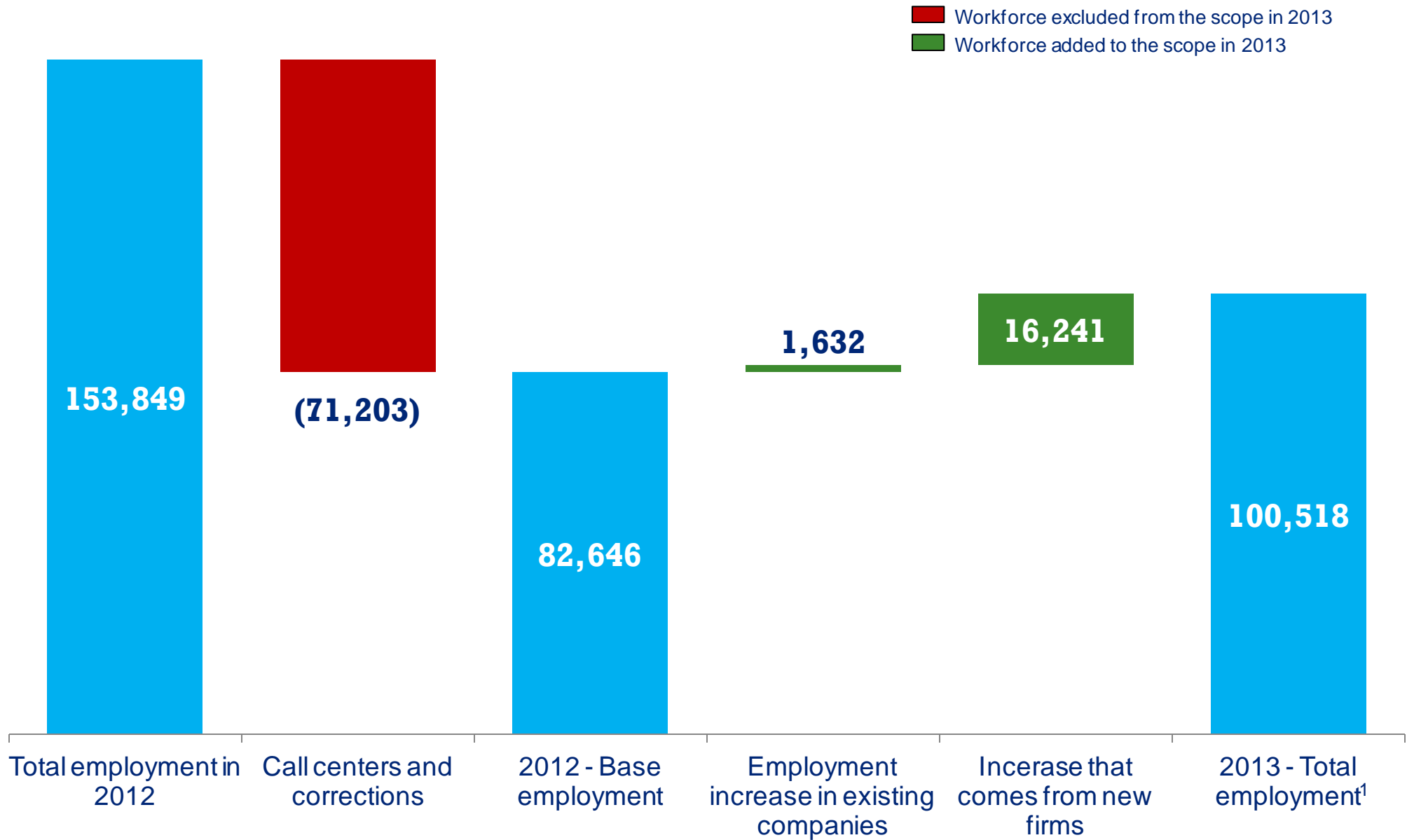
Export destinations

Top export destinations mentioned by survey respondents among the top three countries that they export*



*Countries that are declared as the top three export countries by at least three companies; base is around 90 companies. (including non-export companies)

Employment in the sector

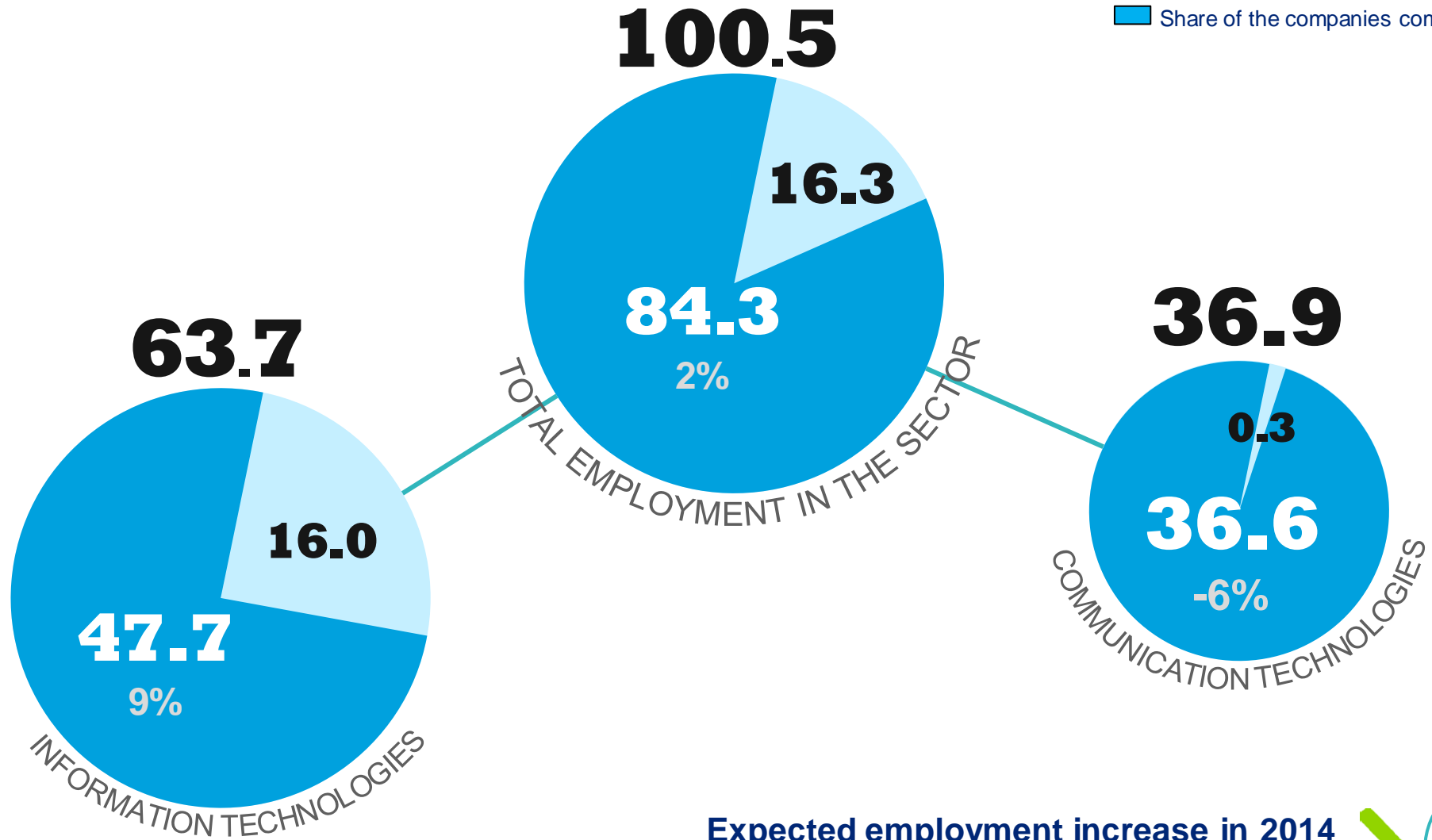


¹ 2,533 firms in total

Employment (in thousands)

Percentages show employment increase in 2013

■ Share of the companies added in 2013
■ Share of the companies come from 2012



Expected employment increase in 2014 according to the survey¹



9%

¹ Survey respondent 95 companies

Employment analysis



Share of female employees¹



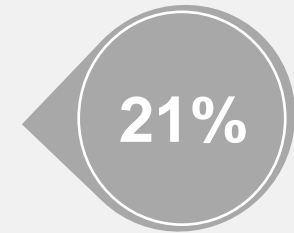
Share of male employees¹



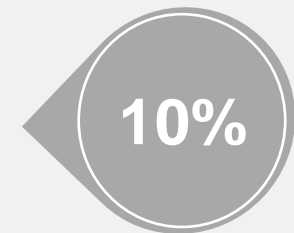
Share of graduate employees²



Share of R&D employees²



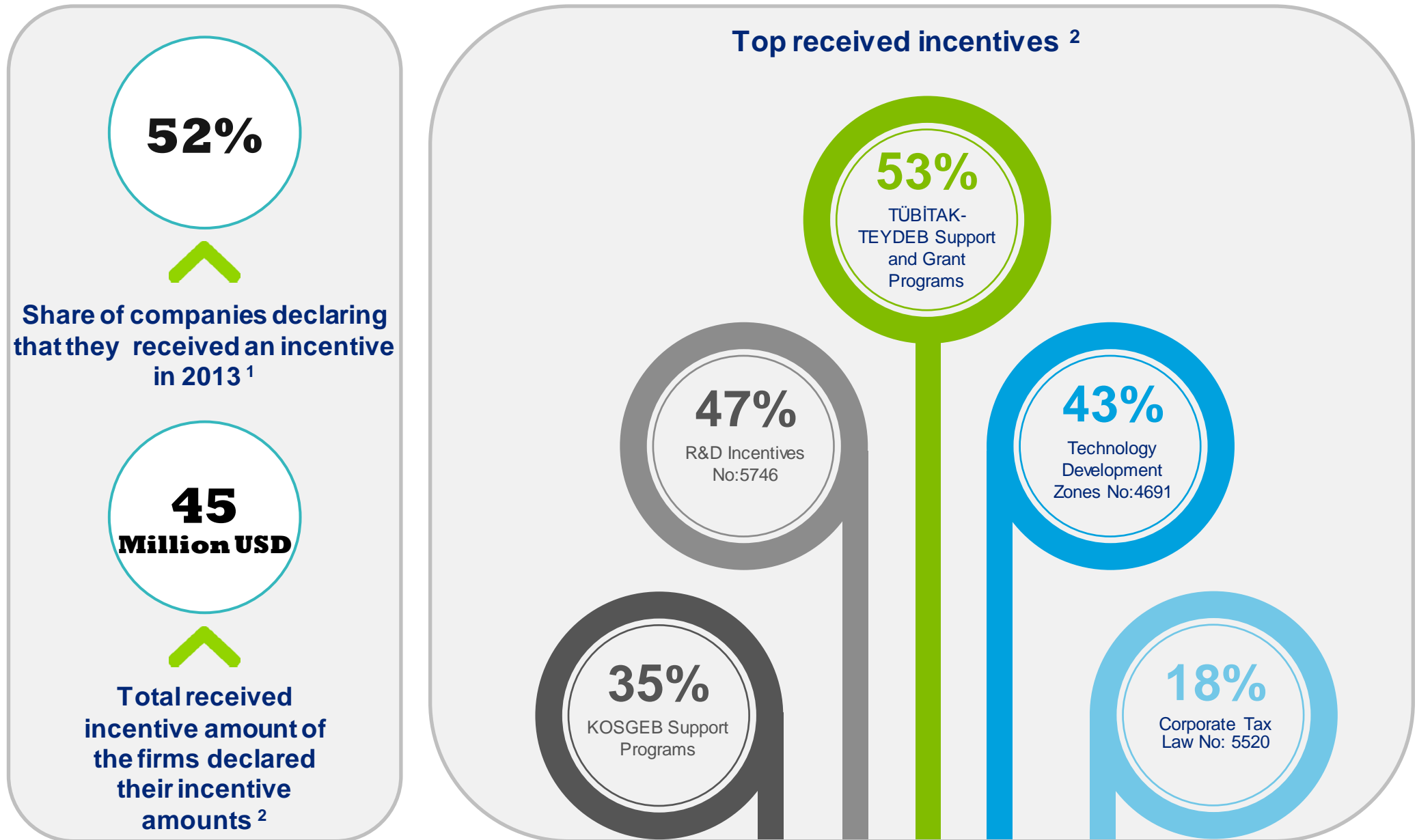
Share of subcontractor employees²



¹ Survey respondent 125 firms and BTK data

² Survey respondent 125 firms

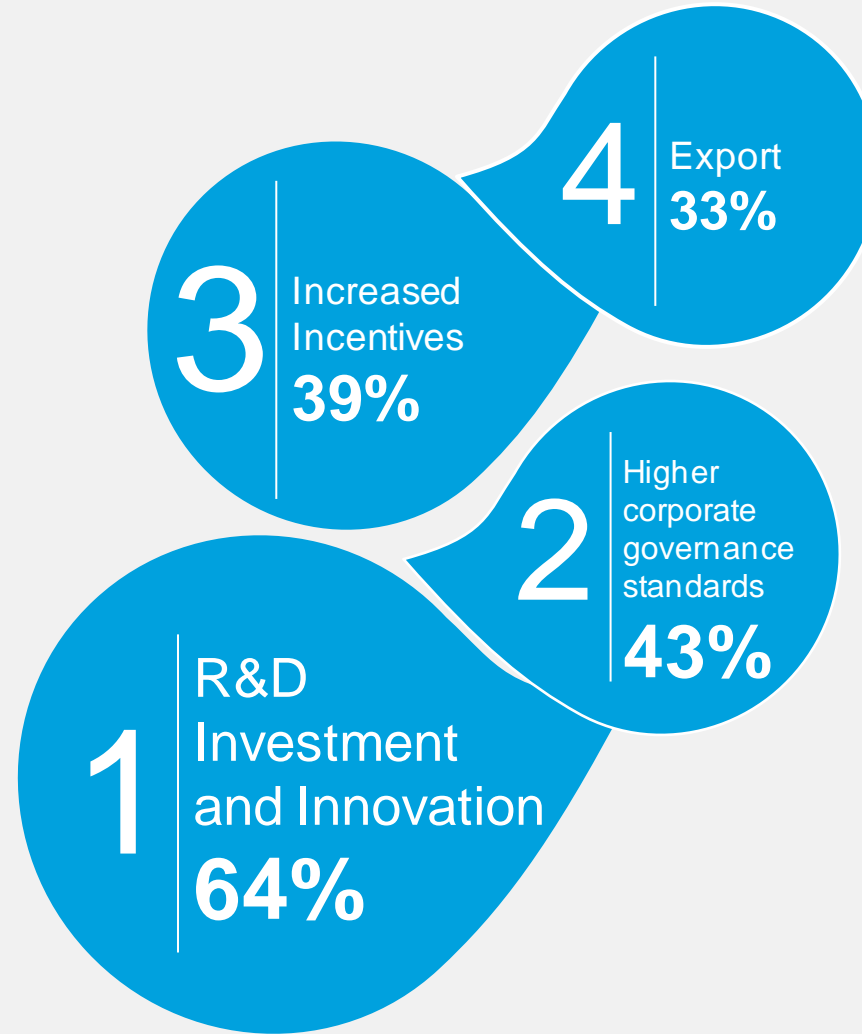
Incentives in the sector¹



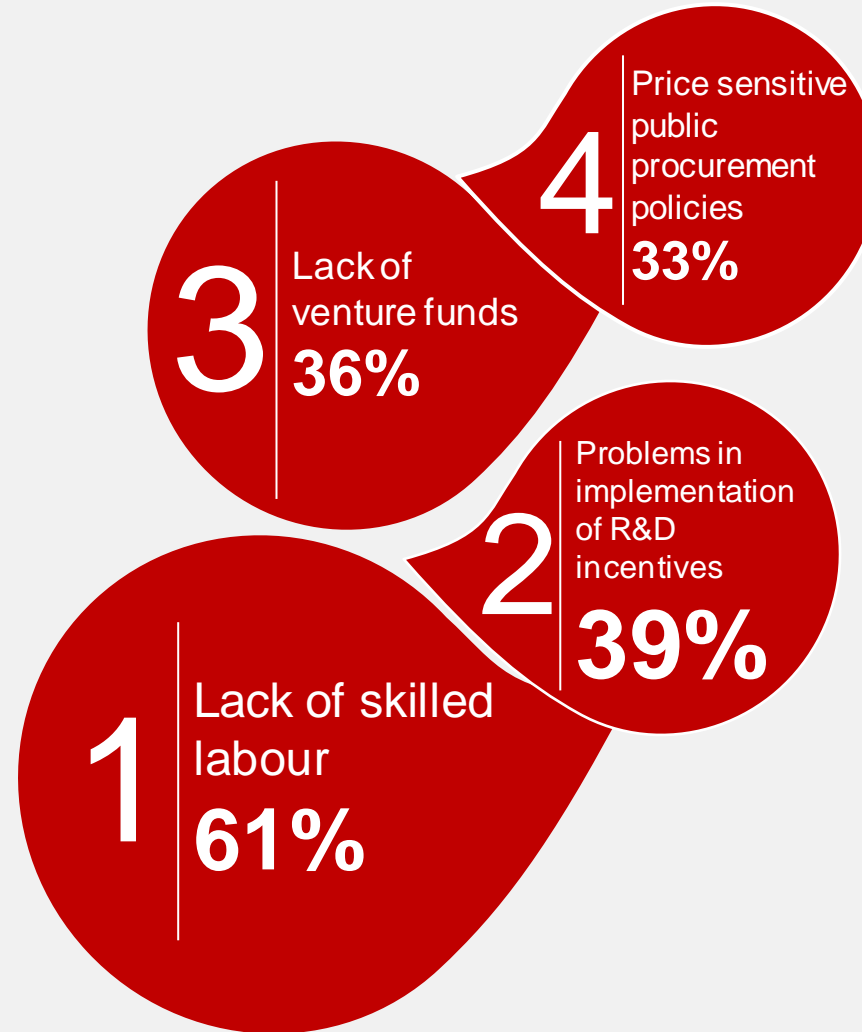
¹ 50 companies that answered relevant questions in the survey noting that they have received an incentive

² 41 companies that both noted they received an incentive and declared the received incentive amount

Top factors in growth of the sector



Top problems in the sector



2013 ICT market (USD bn)





THANK YOU

We would like to express our appreciation to
TOBB Telecommunications Council, Deloitte Consulting,
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TÜBİSAD member firms and sector companies
for their valuable contributions .

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