

# ICT Industry In Türkiye



INVEST IN TÜRKİYE



# AGENDA

## 1- Executive Summary

**Executive  
Summary**

**1**

**Turkish ICT  
Sector  
Outlook**

**2**

**Growth  
Drivers in  
Türkiye**

**3**

**Opportunities  
in Turkish ICT  
Sector**

**4**

**Start-up  
Ecosystem**

**5**

**Success  
Stories**

**6**



# Executive Summary

## FAVORABLE INVESTMENT ENVIRONMENT

- Strong macroeconomic growth with increasing income per capita and a burgeoning middle class
- Favourable demographics with a dynamic, young and online population supporting the industry
- Cost-competitive ICT skills and communication data infrastructure
- Strong government support through technology and innovation ecosystems as well as incentives that focus on R&D



## STRONG INTERNATIONAL PRESENCE

- Global ICT companies have been present in Türkiye with significant activities, using Türkiye as a managerial hub to access regional markets
- Successful partnerships with local companies to grow in the region, capitalizing on locals' human capital, experience and networks



## MARKET POTENTIAL

- World-scale domestic demand and strong ICT skills offer ample opportunities in telecommunications, e-commerce, gaming, banking and finance, data analytics and AI, cloud & data center operations, digital transformation of the Turkish industry, public investments, e-government projects and ICT use in automotive, healthcare sectors





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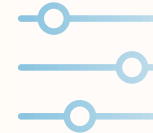
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## ROBUST GROWTH IN THE SECTOR

- ICT market surpassed USD 53 billion in 2025
- The backbone of the growth is the young and well-educated human capital that the country offers
- The ICT ecosystem is strongly backed by international and local companies, creating a diverse environment for all players





# Executive Summary

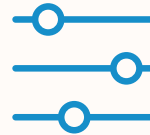
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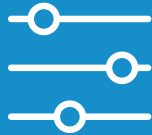




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## 2- Turkish ICT Sector Outlook

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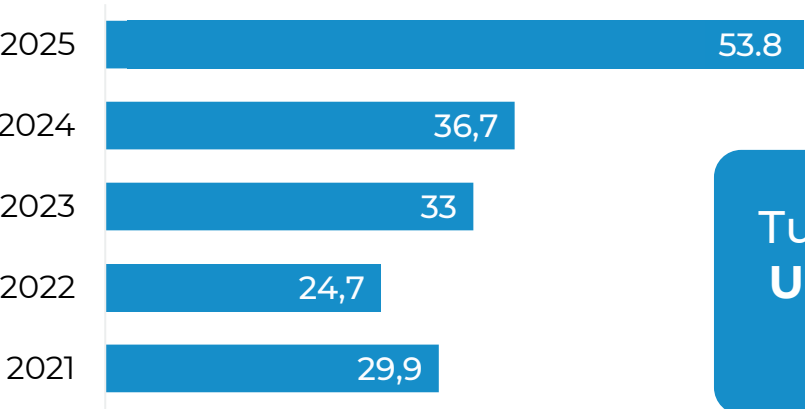
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# Turkish ICT Sector Outlook

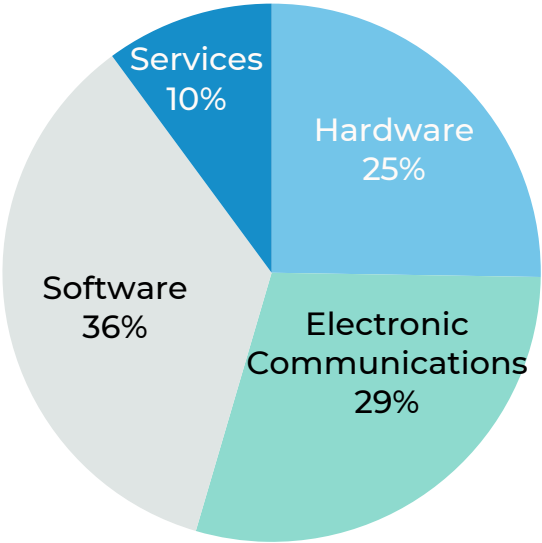
## Turkish Information & Communication Technologies Sector

ICT Market Size  
(In billion USD)



Turkish ICT market has reached **USD 37 billion** market size and a workforce of **290k**

2025 ICT Market Breakdown  
Shares of Subsectors



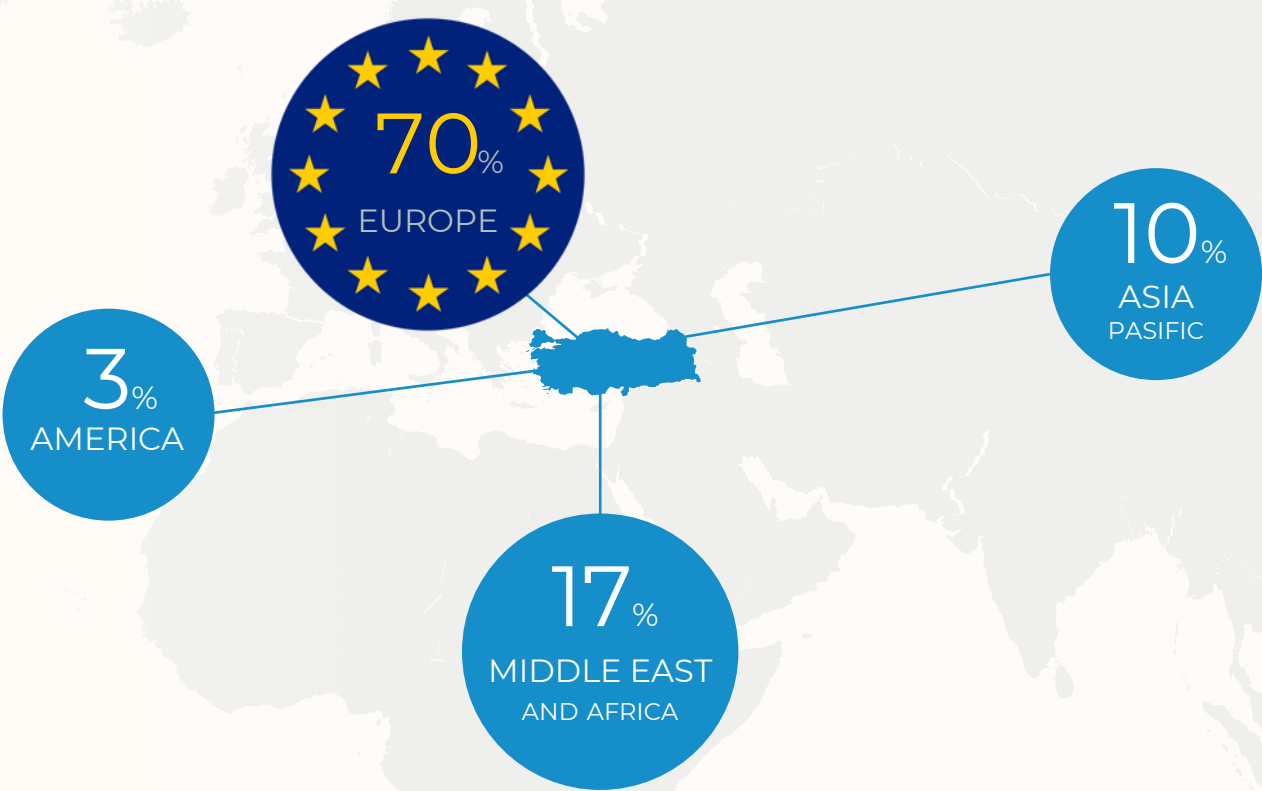
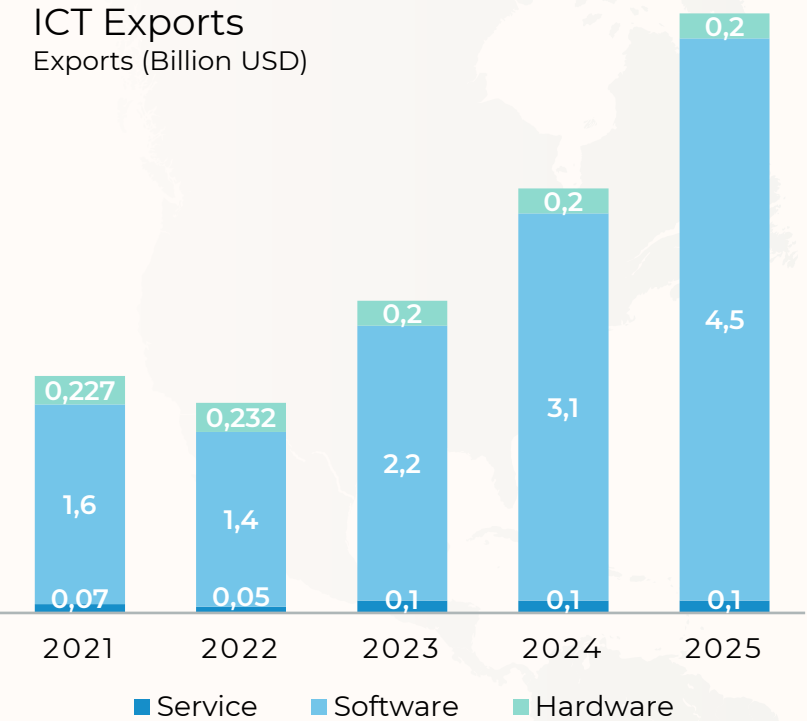


# Turkish ICT Sector Outlook

## Foreign Trade

Türkiye has doubled its exports since 2023 - reaching over **USD 4,9 billion** while broadening its export markets

ICT Exports  
Exports (Billion USD)





# Turkish ICT Sector Outlook

## Major Players

Out of 289,000 employees **5% growth rate**

**33%**

ARE WOMEN



**58%**

HAVE A  
UNIVERSITY  
DEGREE



ALMOST  
**70%**

ARE YOUNGER  
THAN 35



**58%**

ARE R&D  
PERSONNEL



- USD 21 billion of international investment attracted since 2005
- There are over 11,500 companies in Turkish ICT sector where both local and international players are active



# Turkish ICT Sector Outlook

## Major Players



Large-sized local and international companies in the ecosystem



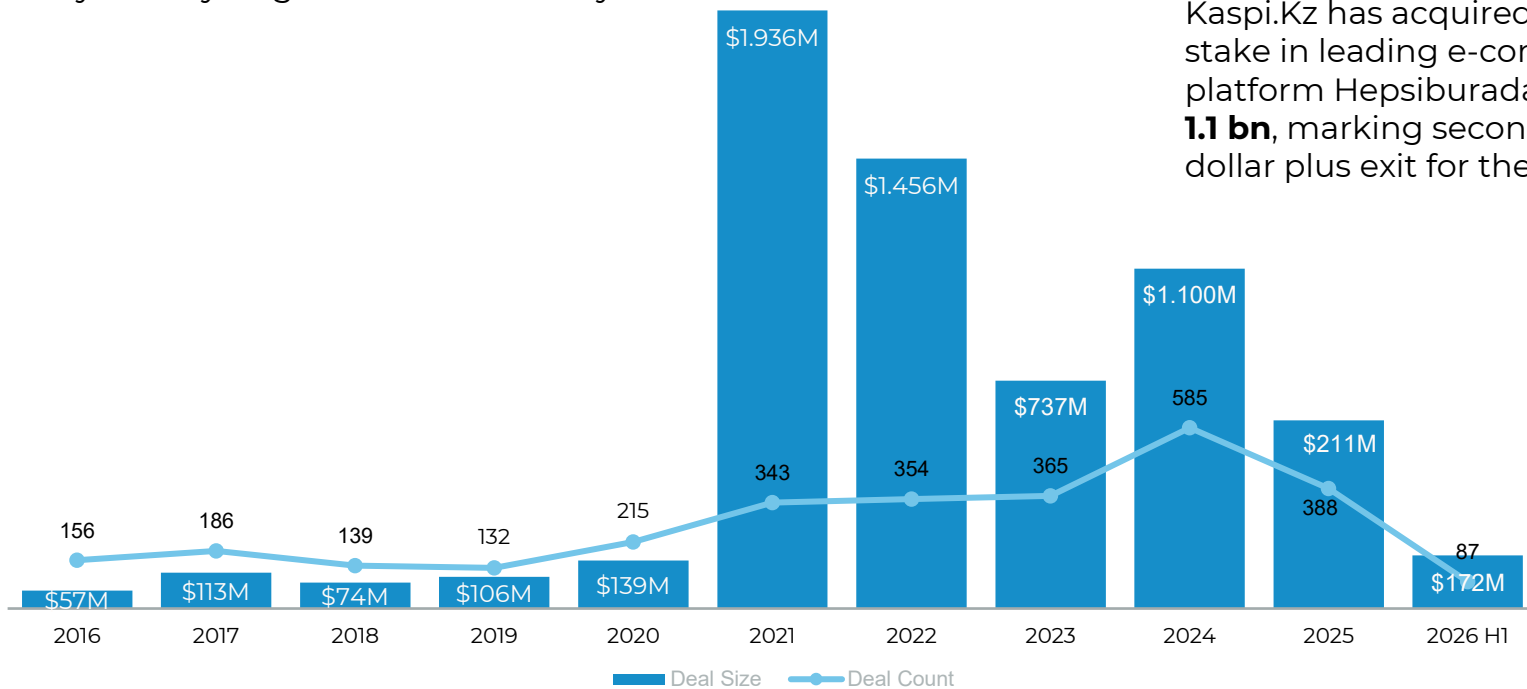


# Turkish ICT Sector Outlook

Turkish ICT Sector is Poised to Further Grow with M&As and New Entrants

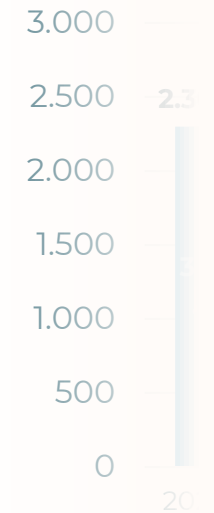
## EARLY-STAGE INVESTMENTS IN ICT COMPANIES IN TÜRKİYE ARE ON THE RISE

Türkiye Yearly Angel & VC Deal Activity



Kaspi.Kz has acquired **65%** stake in leading e-commerce platform Hepsiburada for **USD 1.1 bn**, marking second billion-dollar plus exit for the country

Acquisitions



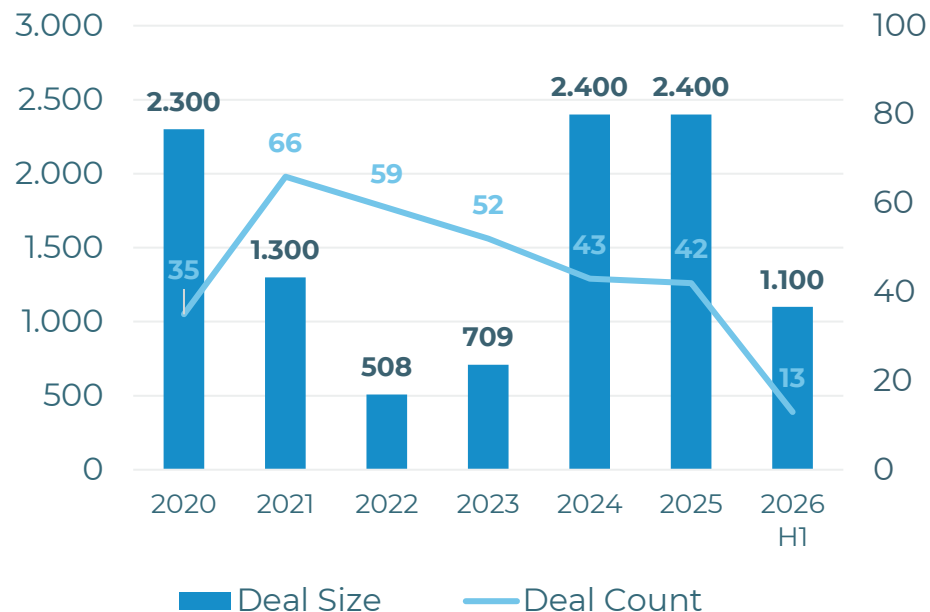


# Turkish ICT Sector Outlook

Turkish ICT Sector is Poised to Further Grow with M&As and New Entrants

## EARLY-STAGE INVESTMENTS IN ICT COMPANIES IN TÜRKİYE ARE ON THE RISE

### Acquisitions and Secondary Transactions



Scopely has acquired majority stake in maker of puzzle app Pixel flow in a deal values the startup at **\$1bn**. Loom Games becomes one fastest Unicorn globally.



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## 3- Growth Drivers in Türkiye

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# Robust Economy

Track record growth and  
bright future with proven  
resilience

 **11<sup>th</sup> largest economy  
in the World** 



## Ranking of Economies By GDP at PPP

### 2003

- 1st** USA
- 2nd** CHINA
- 3th** JAPAN
- 4th** GERMANY
- 5th** INDIA
- 6th** FRANCE
- 7th** RUSSIA
- 8th** UK
- 9th** ITALY
- 10th** BRAZIL
- 11th** MEXICO
- 12th** SPAIN
- 13th** INDONESIA
- 14th** CANADA
- 15th** S. KOREA
- 16th** S. ARABIA
- 17th** AUSTRALIA
- 18th** TÜRKİYE

### 2025

- 1st** CHINA
- 2nd** USA
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### 2026

- 1st CHINA
- 2nd USA
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### 2052

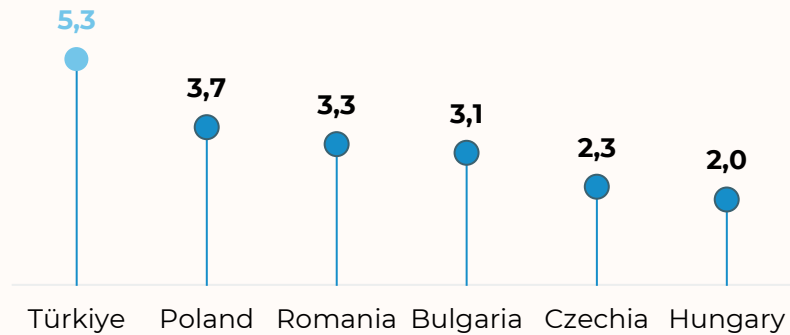
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# Robust Economy

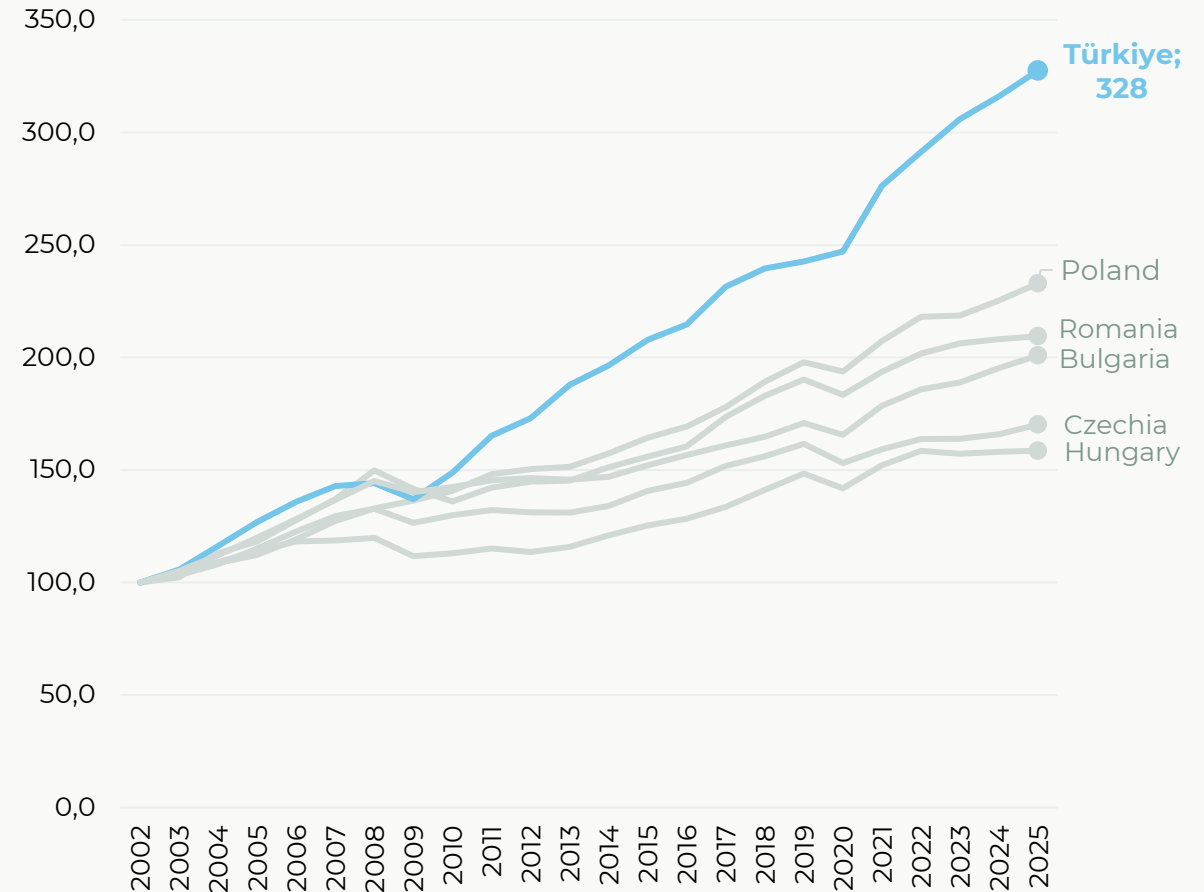
Track record growth and  
bright future with proven  
resilience

**Average Annual GDP Growth (%)**  
2002-2025



Source: TurkStat, IMF

**REAL GDP GROWTH**  
(INDEX: 2002=100)



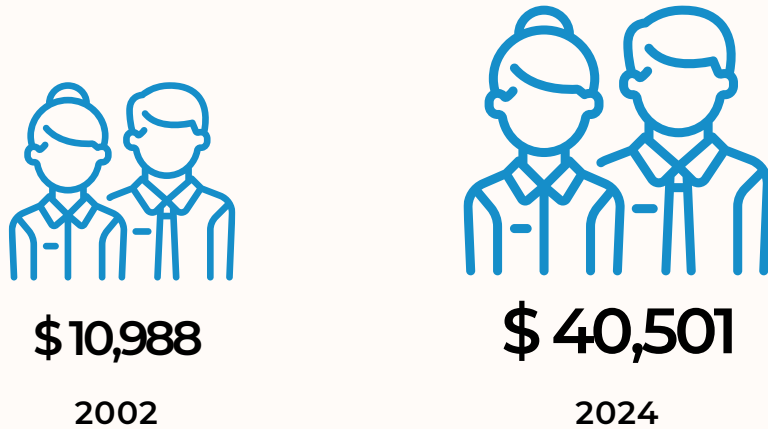


# Bourgeoning Middle Class

Türkiye's Economic Growth Has Paved the Way for Emergence of a Sizeable Middle-Class

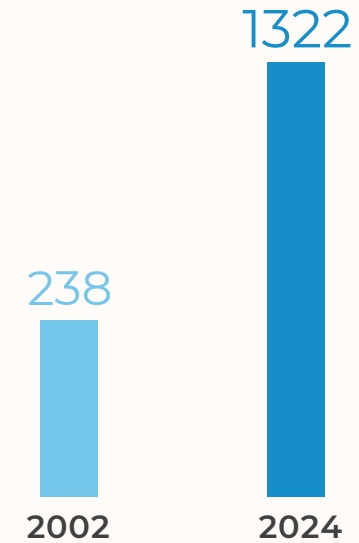
## Tripling Income Per Capita

(GDP per capita at purchasing power parity)



## Turkish Economy

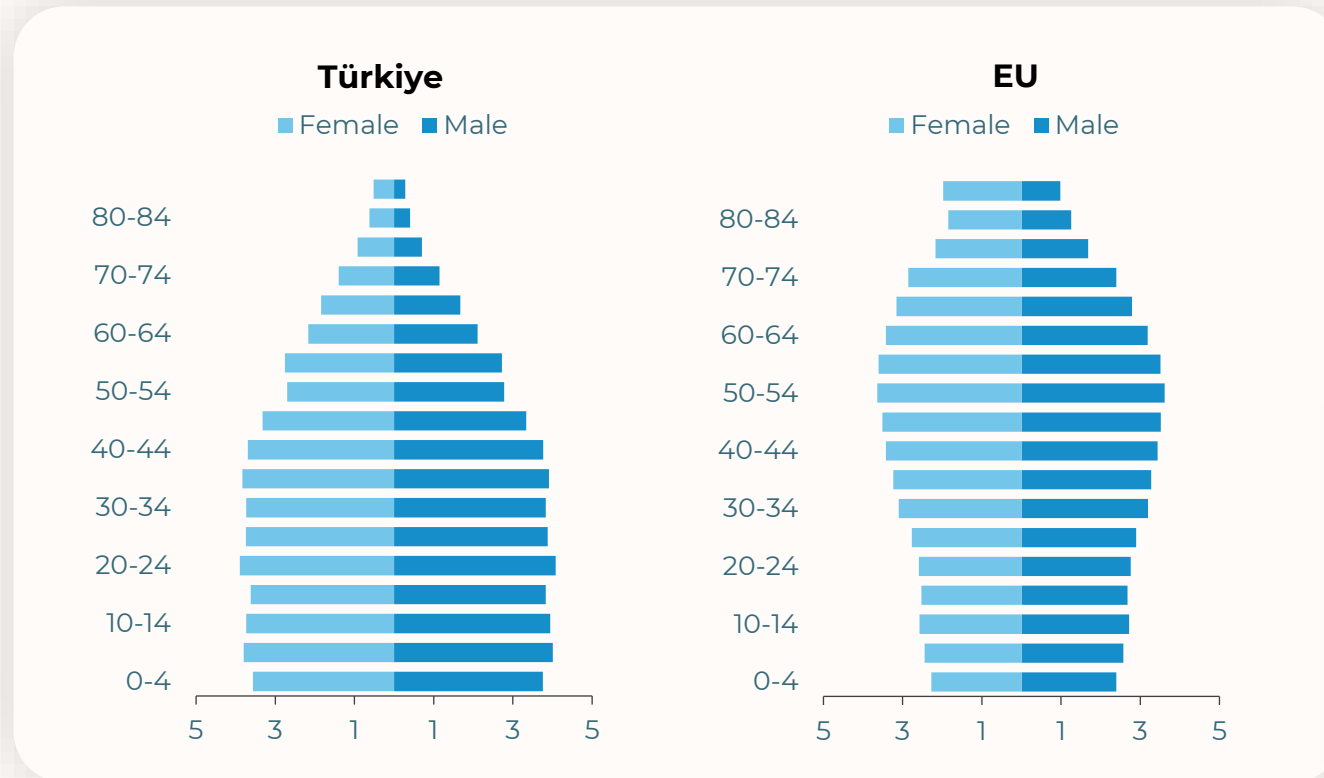
(GDP at current prices, USD Billion)





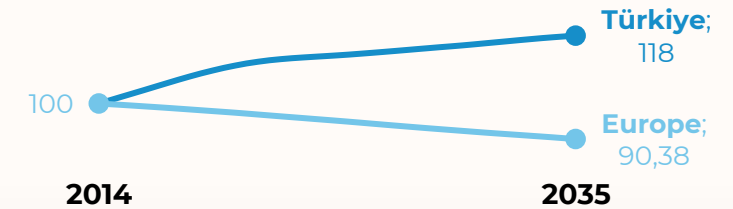
# Favorable Demographics

Half of population under age of 34.4 creating dynamic labor force and fiscal discipline



## Working Age Population

(15-64+, index: 2014=100)



## Total Dependency Ratio

(%, Lower is better)

Formula; (Age 0-14 & 65+)/ (Age 15-64)

|         |      |      |
|---------|------|------|
| Europe  | 46.7 | 63.7 |
| Türkiye | 51.8 | 51.3 |
|         | 2010 | 2035 |



# Skilled & Cost-competitive Labor Force

## Türkiye's Education System Upgraded to Offer Outstanding Academic Programs



**63,805**  
Engineering  
Undergraduate

 **2,093**  
ICT Graduate

**<> Türkiye**  
**Açık Kaynak**  
**Platformu</>**

Türkiye Open  
Source Platform  
[turkiyeacikkaynakplatformu.com](http://turkiyeacikkaynakplatformu.com)

Ecole 42 offers peer-to-peer, project based, and gamified learning system with a capacity of 800 stations to fill the gap of qualified software developers in digital transformation of manufacturing, finance and communication sectors

**88,844**  
TOTAL

**{1111  
0100  
0010  
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0000}** **mllyon**

1 million software developer training program has been launched to upgrade country's labor force with regard to its ever-growing digital sectors



**9,192**  
Engineering  
Graduate



**13,754**  
ICT  
Undergraduate

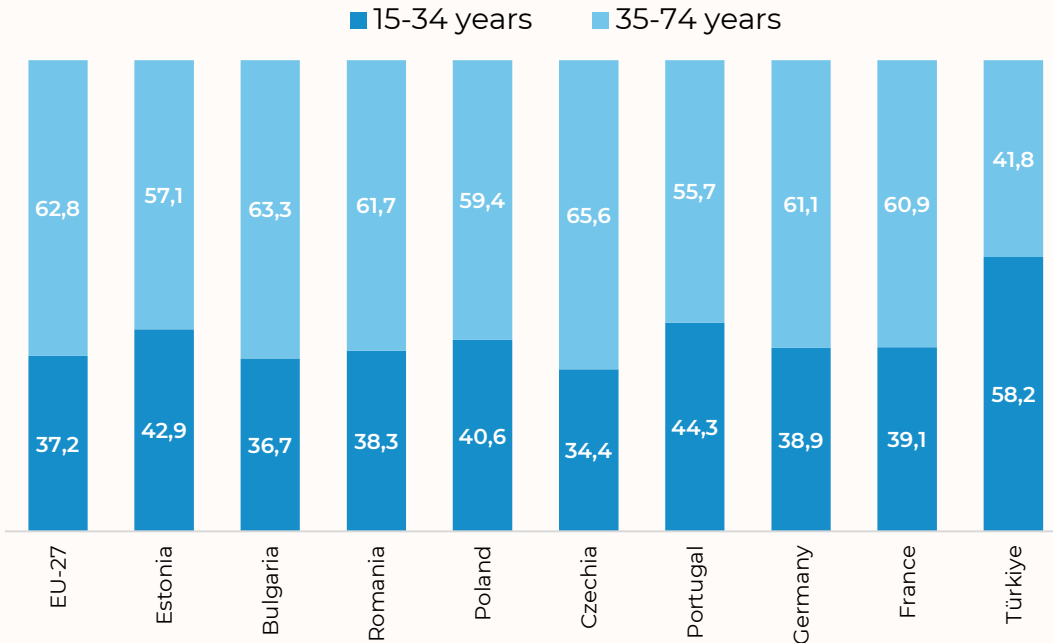
**Over 200K Professional software developers in Türkiye**



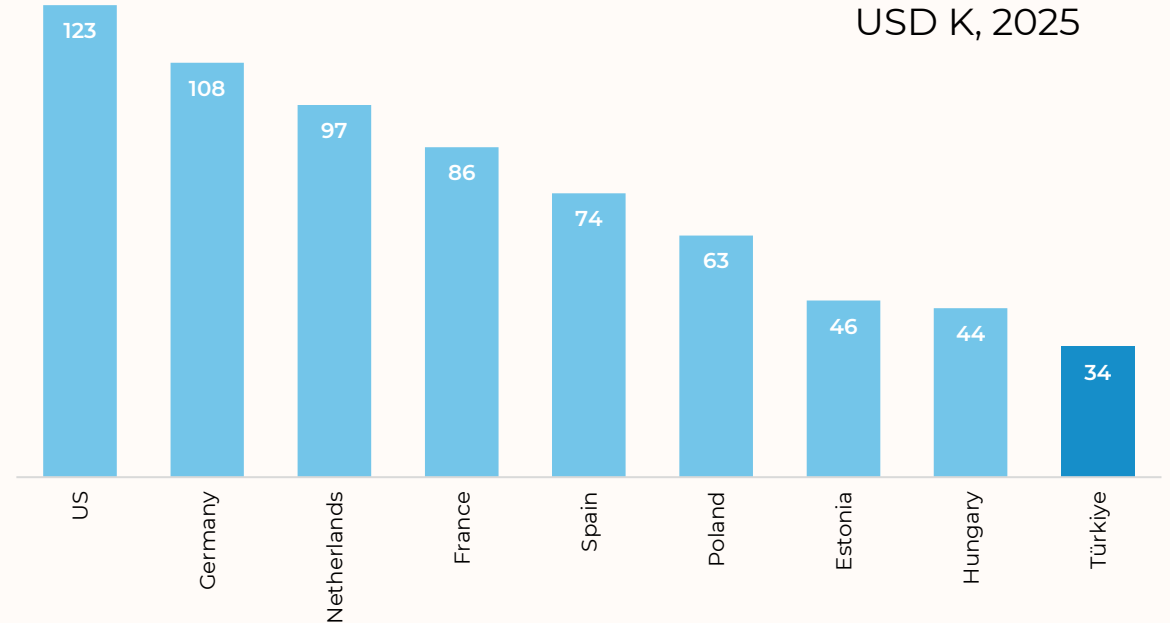
# Skilled & Cost-competitive Talent Pool

## To Support A Skilled Engineering Pool At Cost-competitive Prices

Distribution of ICT Specialist by Age (%)  
Distribution of ICT specialist by age, 2024 (%)



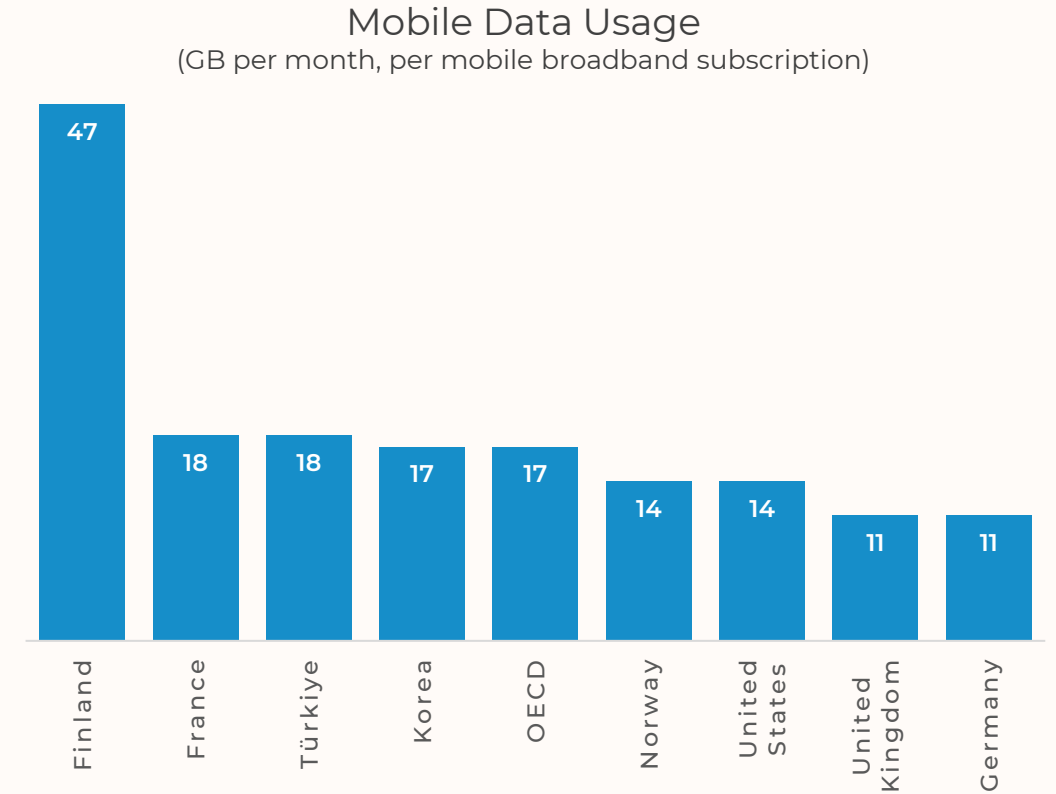
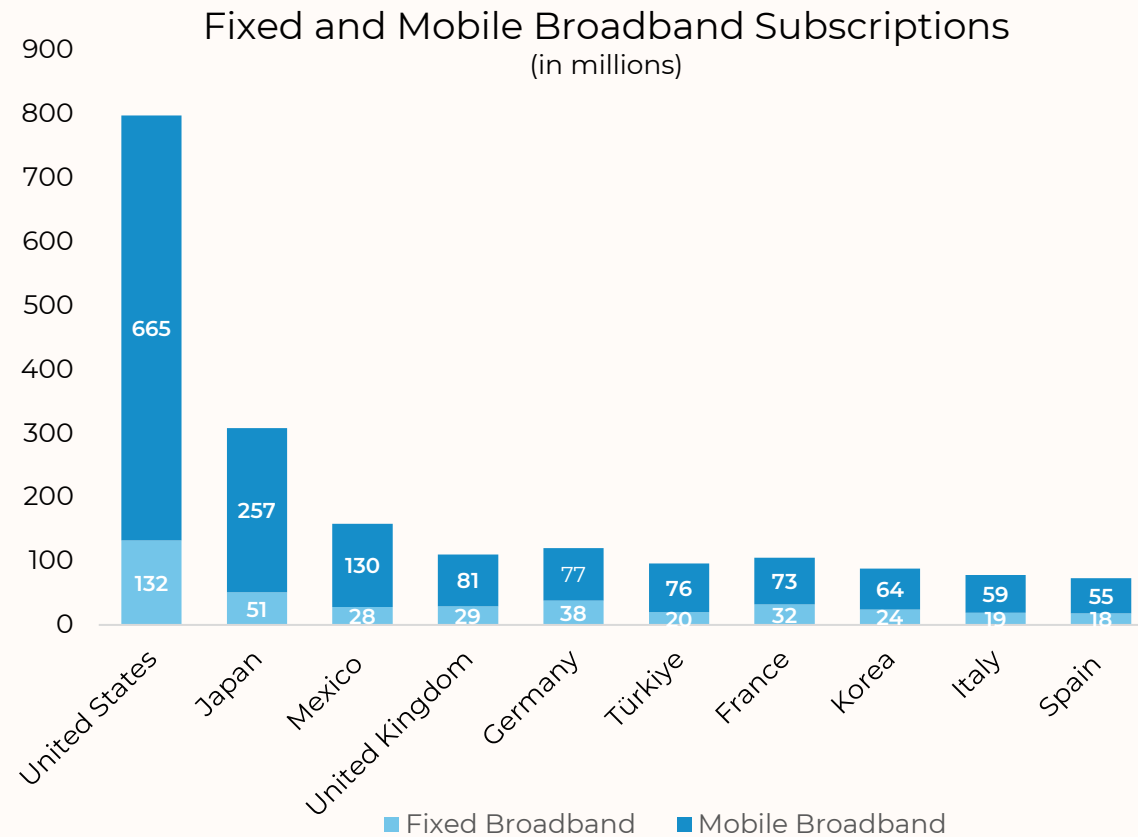
Average Salaries for Software Developers  
(with 3-5 year experience)





# Data infrastructure

**Broadband Subscriptions Doubled Since 2010 To Reach 96 Million, Europe's 6th Biggest Online Population**





# Technoparks & R&D centers

## Technoparks and R&D Centers Make Important Contributions to Innovation Ecosystem and Technology Development



### TECHNOPARKS

- 97 Technoparks (an additional 17 underway)
- 132K employment in over 13,000 companies
- >2300 companies with academia partnership
- Total export is USD 18 Billion



### R&D CENTERS

- 1,368 R&D Centers
- 92K employment; 20% in ICT industry
- 18% international companies



### UNIVERSITIES

- 11 universities in Top 1000; 6 in Top 500 (QS World University Rankings 2025)
- Over 1450 academicians in ICT



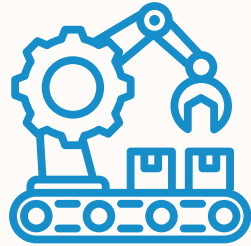


# Lucrative Incentives

Offering lucrative incentives in many ways

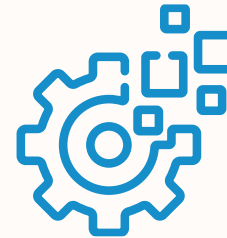
## Manufacturing Incentives

- VAT Exemption
- Customs Duty Exemption
- Tax Reduction
- Social Security Premium Support
- Interest or Profit Share Support
- Machine Support
- Land allocation



## R&D and Innovation Incentives

- Corporate Tax Exemption
- Social Security Premium Support
- Customs Duty Exemption
- Fundamental Sciences Employment Support
- VAT Exemption



## HIT-30 High Tech Türkiye Incentive Program

- Cash Back Support
- Social Security Premium Support
- Customs Duty Exemption
- Land Allocation
- VAT Exemption
- Energy Support
- Corporate Tax Reduction
- Qualified Personnel Support





# HIT – 30 Incentive Program

## HIT-Data Center



**Total Budget  
Support**



**\$1.5 Billion**

### Investment Qualifications



Data centers with  
A minimum of  
30 MW IT  
capacity



Minimum of 50%  
Capacity  
Compatible with  
AI hardware



Maximum  
PuE value of  
1.4



Investments  
Integrated with  
Large scale cloud  
or AI service  
centers

### Supports to be Provided

- ✓ Tax Support up to 50%
- ✓ Energy Support up to 10% of Investment
- ✓ Employment Supportsç



# HIT – 30 Incentive Program

## HIT-Data Center



**Total Budget  
Support**



**\$1.5 Billion**

### Investment Qualifications



From companies  
Among the top  
100 in R&D



With a minimum  
Of 250 R&D  
personnel



In priority  
Technology  
areas



The projects  
That bring know how  
To Türkiye

### Supports to be Provided

- ✓ Grant support up to 50% of staff costs
- ✓ Grant support to R%D partnerships
- ✓ Corporate tax exemptions
- ✓ Tax exemptions



# HIT – 30 Incentive Program

## HIT-AI

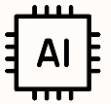


**Total Budget  
Support**



**\$1.6 Billion**

### Investment Qualifications



Large scale cloud  
Investments  
Including AI services



Investments for managed and  
Self service cloud services  
(IaaS, PaaS, SaaS etc.)



A minimum of  
\$100 million AI  
investment

### Supports to be Provided

- ✓ Tax Support up to 60%
- ✓ Grant support up to 40% of Investment
- ✓ Favourable Financing for up to 70% of Investment
- ✓ Employment Supports
- ✓ Market Development Support up to 20% of investment
- ✓ Grant Support up to 20% for AI Hardware Investments



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## 4- Opportunities In Turkish Ict Sector

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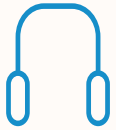
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# Opportunities in Sub-sectors

**Türkiye Offers Solid Fundamentals for Profitable Investments in the ICT Subsectors**



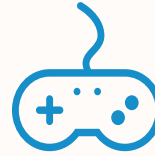
TELECOMMUNICA  
TIONS



E-COMMERCE



FINTECH



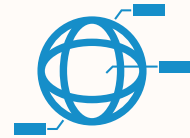
GAMING



CLOUD &  
DATA CENTER



DIGITAL  
TRANSFORMA  
TION



DATA  
ANALYTICS & AI



PUBLIC  
INVESTMENTS &  
E-GOVERNMENT



ICT IN  
MOBILITY



ICT IN  
HEALTHCARE



## Telecommunications

# Türkiye's Telecom Market Has Reached to 868 Billion TRY-USD 22 Billion in 2025



Strong growth of the market – doubled to 868 Billion TRY in the last 5 years



Investment in Telecoms - USD 2.9 Billion in 2024



Fixed and mobile broadband subscriptions in Türkiye have exceeded 98.2 million in 2025



657k km of fiber - optic with 9.3 million subscribers (as of 2025 Q3)



A high mobile / smartphone penetration rate of 75%



Strong ecosystem with local and international players with a total of 52K employees

Türk Telekom

TURKCELL

vodafone

vodafone Net

TURKSAT

netgsm  
Yeni Nesil Telekom Operatörü

TTNET  
INTERNET

TURKCELL  
SUPERONLINE

millenicom

ESER  
TELEKOM

isnet  
İNSAN İÇİN TEKNOLOJİ

turknet



# 5G and Beyond

## 5G will shape all vertical sectors



Energy



Manufacturing



Healthcare



Automotive



Transportation



Finance



Milat Network Management and Analysis System, which is the national and domestic network management infrastructure, is now in use.

**Ulak is now developing 5G Core Network Development project Çınar.**



5GTR Forum established to develop products, services and technologies that will take place in domestic and international market in next generation communication systems



**Nokia** has a partnership agreement with Karel, Turkish electronic manufacturer, to produce 4.5G and 5G base stations in Türkiye. Local manufacturing of Nokia base stations started in 2022



**5G spectrum tender drew a total of \$2.95 billion** in winning bids. Turkcell, Vodafone and Turk Telekom secured key blocks across the 700 MHz and 3.5 GHz frequency ranges.



**5G Valley Open Test Bed** created to be a platform for **R&D and Product development opportunities** for public, university, operator, and industry collaborations that work on 5G and Beyond Technologies



**Ericsson Türkiye Research Laboratory**, within the scope of TÜBİTAK's 1515 - Support Program for Frontier R&D Laboratory Support Program, carries out innovative studies in the field of **5G, IoT and 6G technologies.**



**End to End Domestic and National Communication Network Project** carried out by 16 members of Communication Technologies Cluster and 3 operators



## E - Commerce

# Türkiye's E-Commerce Market Has Reached to USD 115 Billion in 2025



E-commerce market in Türkiye continues to grow with an annual growth of 62%, reaching TRY 3 Trillion



Fixed and mobile broadband subscriptions in Türkiye have reached a total of 96 million in 2024 - an of 116% impressive penetration rate



Enhanced use of internet and incremental number of online shoppers' rate of 49.5% - a population of 28.4 Million



The share of e-commerce accounted for 6.5% of GDP and 19% of total trade



Türkiye is home to global e-commerce giants and received many international investments



In payment methods, card payments took the lead with 66%, followed by EFT/bank transfer



modanisa



trendyol



TIGER  
Tiger Global Management, LLC

sahibinden.com



n11.com



Kaspi.kz

nepsiburada.com



## Fintech

# Türkiye is Transforming into a Fintech Hub, With Over 665 Companies and an Online Payment Market of Over USD 145 Billion



A strong banking system with an educated workforce



Europe's biggest credit and debit card market – 463 million (as of October 2025)



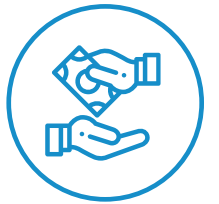
Total amount of card payments at around USD 536 Billion (in 2025)



Remote and Digital Customer Acquisition has been enabled for Banks and FinTechs.



The Instant and Continuous Transfer of Funds (FAST) System has made it possible to initiate instant retail payment service available 24/7



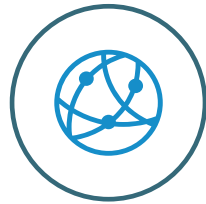
Legislation for Account Information Service(AISP) and Payment Initiation Service (PISP) enacted within the scope of open banking applications in line with the PSD 2 of EU



Share of online payments is 35% with around USD 145 Billion



Türkiye's strategic location within a 4-hour flight distance from London and Dubai



Türkiye's vision of turning Istanbul into a regional finance center



Digital banking license issued for the 5 Fintechs (as of December 2025)



Equity-based crowdfunding applications are available- 19 platforms registered (as of December 2025)

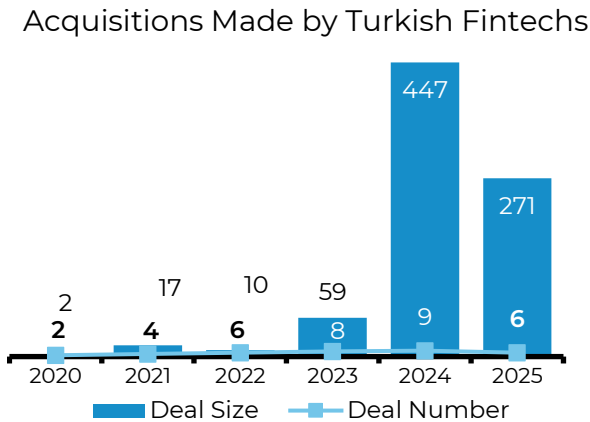
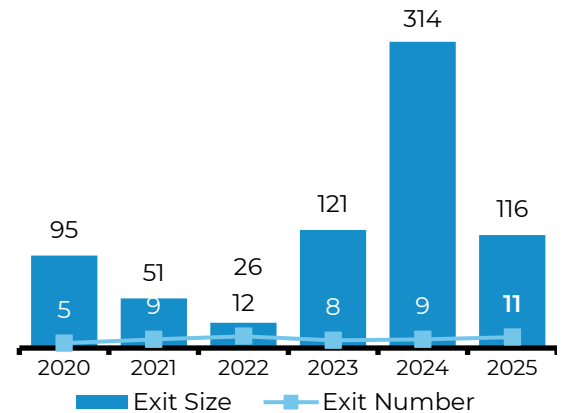
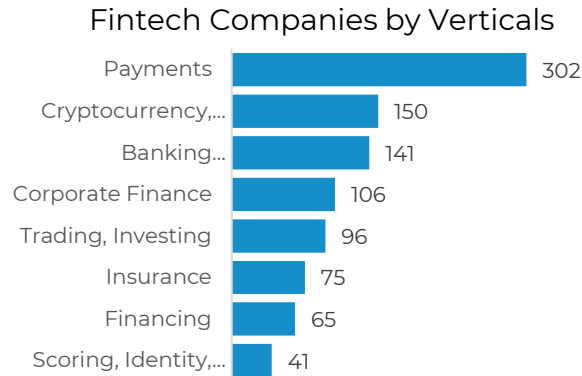
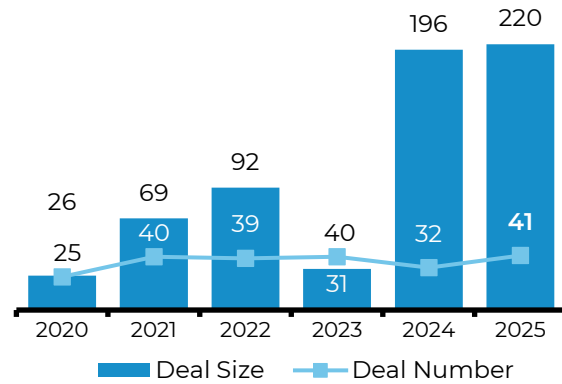


126 Million active user base in digital banking platforms



## Fintech

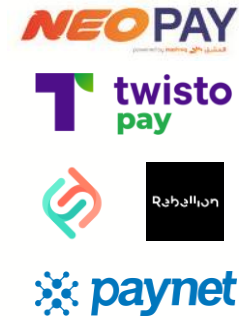
# Fundraising Activity in Türkiye



### Major VC-backed Exits:



### Major Acquisitions by Turkish Fintechs



**fintechtime.**  
TURKISH FINTECH ECOSYSTEM





## Gaming

# Türkiye's Gaming Market Has Passed USD 1.1 B in 2025

Total generated game revenue in 2025 is

- USD 1.1 Billion
- USD 650 Million in mobile
- USD 360 Million in PC/Console
- Digital gamers exceeded 50M+



An ecosystem that consists of over 740 large & small companies including indies -



Game startups recently received notable investments Good Job (\$83M), Tale Monster (\$37M), Cypher (\$30M), Bigger Games (\$25M)



### TOP GAMING EXIST IN TÜRKİYE

|  |                     |  |
|--|---------------------|--|
|  | \$1.8B<br>2020      |  |
|  | \$1B<br>50%, 2026   |  |
|  | \$250M+<br>2018     |  |
|  | \$200M<br>80%, 2019 |  |
|  | \$180M<br>80%, 2020 |  |

### TOP 5 EUROPE CITIES FOR GAMING

|    |                           |     |
|----|---------------------------|-----|
| 01 | LONDON<br>Game Studios    | 636 |
| 02 | İSTANBUL<br>Game Studios  | 331 |
| 03 | PARIS<br>Game Studios     | 136 |
| 04 | ANKARA<br>Game Studios    | 108 |
| 05 | STOCKHOLM<br>Game Studios | 87  |



#ACTIVE GAMING  
STARTUPS

844



#GAMING  
INCUBATORS

12



#GAMING  
ACCELERATORS

21



#GAMING  
CLUSTERS

2



GAMING  
ONLY FUNDS

13



#UNICORNS

2



EXITS  
(\$100M+)

5





## Cloud & Data Center

# Türkiye's Cloud Computing Market Has Reached USD 2.7 Billion In 2024



Cloud computing market in Türkiye is USD 2.7 Billion in 2024, expected to reach USD 9.7 Billion by 2030



Robust terrestrial fiber and submarine cable connectivity with international networks



There are 25 Tier III and Tier IV data centers



Regulation requires data systems for telecom companies and banks in the country



32% of SMEs in Türkiye use cloud computing services whereas this ratio increases to 54% for large size companies (with >250 employees)



A total of 100,000m2 white space is estimated – 60K white space capacity in Marmara region and 30K in Ankara



Data center investments are incentivized - lower energy costs, fiber optic infrastructure, land etc.

Data Centers run by Telecom Operators - **54K m<sup>2</sup>** white space

**657K km** Fiber length

## VoD (Video-on-Demand) Market in Türkiye

Türkiye remains MEA market leader, with USD 535 Million in SVOD revenue in 2023, it is expected to show 7.19% CAGR resulting in a projected market volume of USD 733M by 2027

Netflix, Amazon , HBO Max, Disney+ in the market as well as Turkish VoD platforms like Tabii, BluTV, Exxen, TV+, PuhuTV and Gain

Turkish content is widely popular in Eastern Europe, Middle East and Latin America - amounts for 25% of all TV show transactions around the world



EQUINIX





# AI & Data Analytics



Türkiye Open Source Platform  
500,000 software developers training program initiated to achieve worldwide scaled products



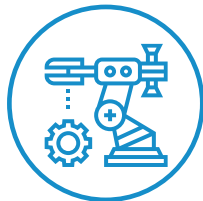
Artificial intelligence (AI) and machine learning (ML) incorporated into Cloud services utilized for smart automation and predictive analytics



TÜBİTAK Artificial Intelligence Institute plays a critical role as a catalyst for advance research in the development of start-up networks and



Financial services sector is the pioneering industry for the exploitation of AI applications followed by retail



Machine learning is the most preferred AI tool for Turkish companies followed by data analytics and artificial neural networks



66 Turkish startups with published patent application in the field of AI and Data Analytics



9,409 indexed publications made Türkiye #16th globally in AI publications

Over 1,200 Academicians with research areas in AI

Top-notch universities offering undergraduate and graduate programs that focuses on the field of AI.

TUBITAK provided 1.7 billion TRY financing to over 1,700 R&D and Innovations projects in the last 10 years-

Digital transformation of Industry, Digital transformation in commerce and Smart living and health were the most supported verticals





# Cyber Security

Cyber Security Market is USD 400M in 2024, Expected to Show 7.9% CAGR Resulting in a Projected Market Volume of USD 585M By 2029

## TUBITAK Research Technologies & Solutions

Institute carries out innovative solutions in the field of Data Leakage Prevention, Centralized Cyber Threats, Cyber Space Trap, Penetration Tests, Risk Analysis, Malware Analysis, Vulnerability Analysis

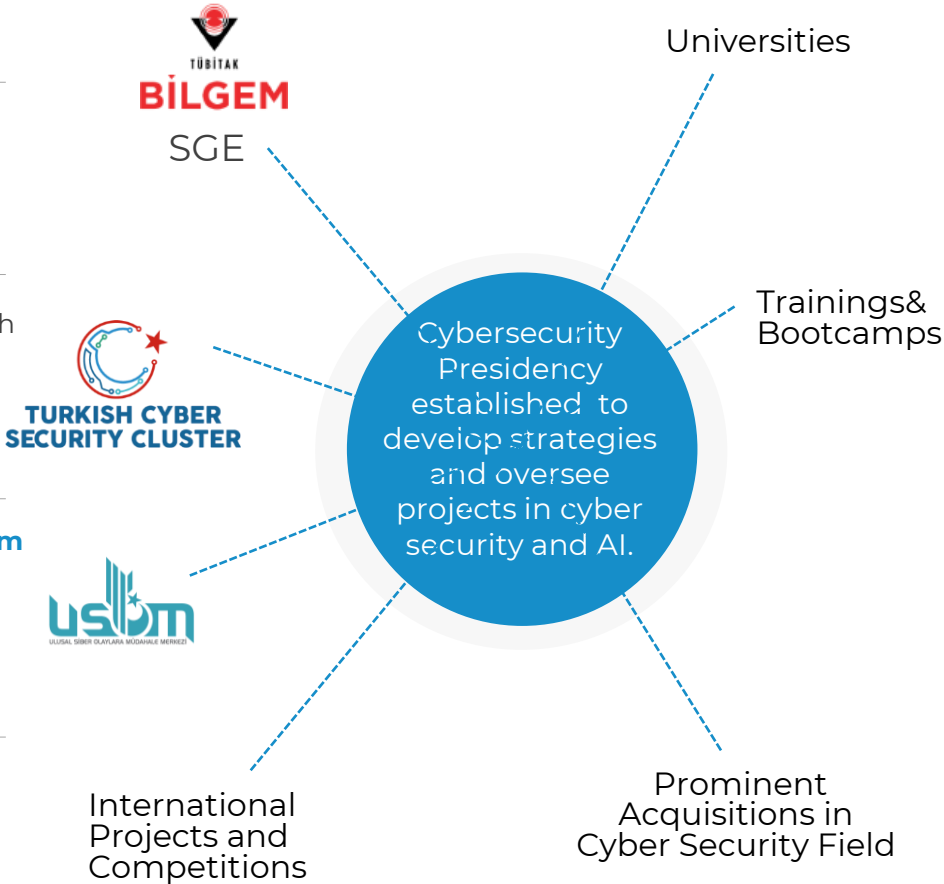
Established in 2017 to develop the ecosystem with the contribution of all public agencies, academia and private sector representatives under the leadership of the Presidency of Defense Industries.

## National Cyber Security Incident Response Team

There are over 2200 CSIRTs and over 6500 cyber security professionals in nearly every sector in Türkiye that coordinate with TR-CERT regarding cyber incidents



STM beats out several rivals to secure one of the largest software development projects on NATO's intelligence infrastructure



## Cyber Security MA/PhD Programs

Top-notch universities offering undergraduate and graduate programs cyber security and informatics.

Ankara, Ege, Gebze Technical and Istanbul Technical Universities launched 4 new cyber security vocational schools to meet ever-growing demand for cyber talent.

## Private Sector Trainings:



THY Cyber Take Off



Picus Cyber Talent Academy



Patika Cybersecurity Bootcamp



# Digital Transformation

Türkiye Has Announced National AI Strategy Roadmap on it's Road to Become a Regional Leader in AI Field

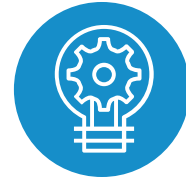
## National AI Strategy Objectives



### Human Capital

Training AI Experts and Increasing Employment in the Domain

- Employment in the field of AI will be increased to 50,000 people.
- The aim is to hire 1,000 people for AI related roles in central and local government institutions
- The number of graduate-level diploma holders in the field of AI will be increased by 10,000.
- The number of academicians working in the field of AI will be increased to 5,000.
- It will be ensured that the number of postgraduate theses on social and technical fields of AI is at least 1,000.



### Infrastructure

Facilitating Access to Quality Data and Technical Infrastructure

- It will be ensured that the number of public institutions and enterprises providing access to common high performance computing infrastructures will be at least 200.
- At least 50 institutions will be included in the Public Data Space.
- At least 10 sectoral cloud platforms for data sharing will be established.
- The number of individual AI project developers will be increased to at least 1,000 within Türkiye Open-Source Platform.
- At least 1,000 open datasets will be shared via the Open Data Portal.



### International Cooperation

Strengthening International Cooperation

- Participation in at least 100 cross-border project calls in AI will be ensured.
- At least 2 Türkiye-oriented international reports will be conducted in the field of Trustworthy and Responsible AI.
- At least 10 international competitions and project calls will be launched in the field of AI.

# Digital Transformation

Türkiye Has Announced National AI Strategy Roadmap on it's Road to Become a Regional Leader in AI Field

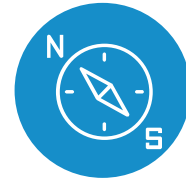
## National AI Strategy Objectives



### AI Ecosystem Supports

Supporting Research, Entrepreneurship, and Innovation

- It will be ensured that the ratio of AI R&D expenditures to total R&D expenditures is at least 15%.
- The number of start-ups in the field of AI will be increased to 1,000.
- Public procurement will prioritize commercializing developed AI solutions.
- The objective is to create 5 AI tech spin-offs from public institutions and companies.
- At least 1 global initiative will be established in the field of natural language processing.
- The goal is to start 10 pre-competitive AI projects with a focus in image processing.



### Socioeconomic Adaptation

Regulating to Accelerate Socioeconomic Adaptation

- It will be ensured that at least 20 start-ups benefit from the regulatory sandbox.
- At least 10 sociotechnical research projects will be conducted in AI.
- Research on brain drain and reverse brain drain in AI will be published on a yearly basis.
- AI education workforce surveys will be published on a yearly basis.
- 1 million people annually to benefit from shared digital content for promotional and information



### Structural Transformation

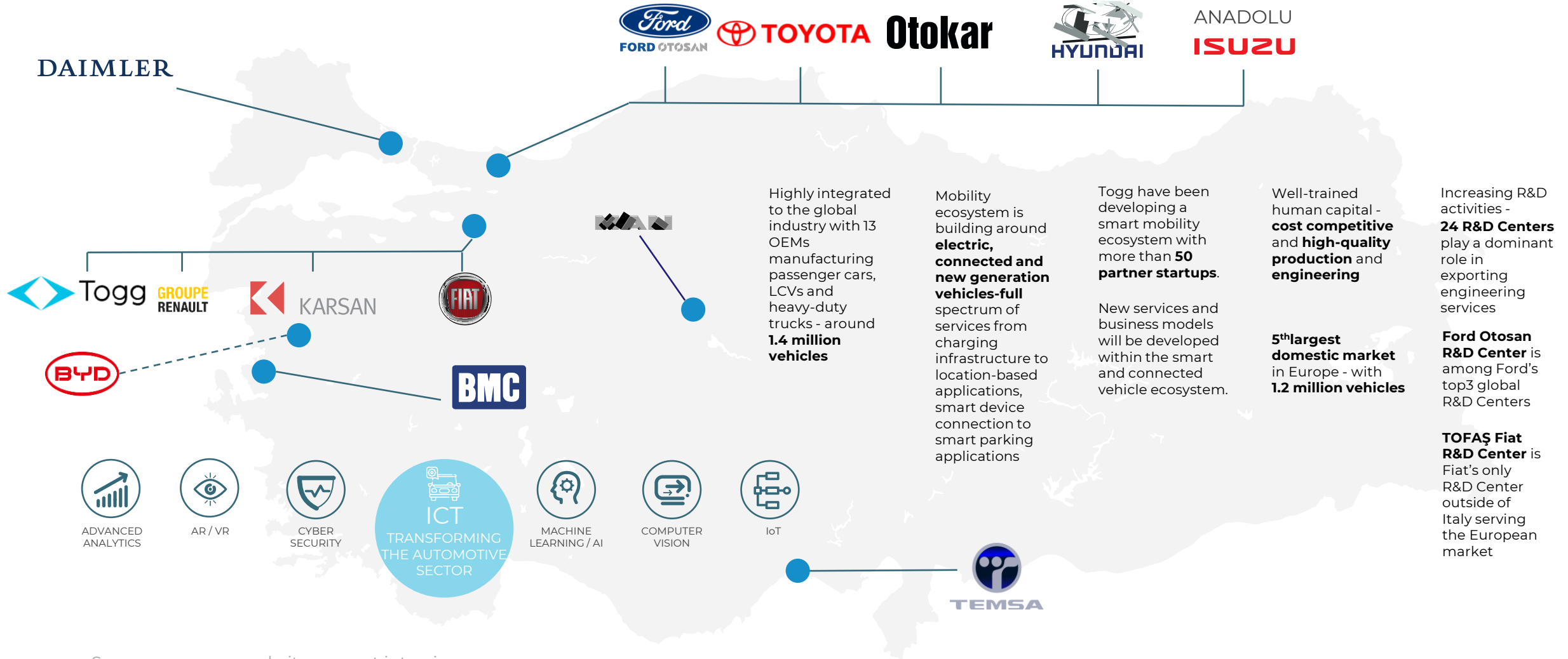
Accelerating Structural and Labor Transformation

- At least 40 projects will be developed in the Public AI Ecosystem.
- At least 100 projects will be developed in Sectoral Co-Creation Laboratories.
- Target: At least 100 organizations will use Public AI-as-a-Service Platform.
- Implementation of AI maturity model and project management guidelines in 150 organizations.
- Awareness training will be provided to 50,000 central and local government employees.
- At least 250 municipalities will actively use AI technologies in smart city applications.
- At least 100 AI applications that receive the Trustworthy AI Seal will be released.



# ICT in Mobility

Türkiye is a Manufacturing and Engineering Center in Automotive and Already an Export Hub for the European Automotive Industry





# Healthtech Ecosystem

Türkiye is a Hub for Healthtech Ecosystem Leveraging the National Health Information System (Nihs) with 1 Billion+ Examination in Health Institutions Per Year



## National Health Information System (NHIS)

The National Health Information System of TÜRKİYE (NHIS) is a nation-wide infrastructure for collecting and to some extent sharing patients' Electronic Health Records (EHRs) since 2009.



It is a personal health record system where you can manage all your health information, regardless of where your examinations and treatments are conducted, and where you can access your medical background from one place.



# 1st

in Europe in the adoption of health informatics systems

HIMSS Analytics EMRAM

Spread of digital health services motivated by the government's ambitious health transformation program is paving the way for hundreds of healthtech ventures

## Family Medicine Information System



National Health Data Dictionary

The Pharmaceutical Track Trace System's (İTS) aim is to provide drug safety and prevent counterfeiting. System follows the supply chain from the production/importation to the end user - SINCE 2012.

Public & Private Telemedicine Platforms

Ministry of Health  
Tele-medicine  
System



callendoc



Klinik



albert

evital



# AGENDA

## 5- Start-up Ecosystem

**Executive  
Summary**

**1**

**Turkish ICT  
Sector  
Outlook**

**2**

**Growth  
Drivers in  
Türkiye**

**3**

**Opportunities  
in Turkish ICT  
Sector**

**4**

**Start-up  
Ecosystem**

**5**

**Success  
Stories**

**6**

# Startup Ecosystem



Istanbul Has Been Ranked 3<sup>th</sup> The Top 100 Emerging Ecosystems For Startups

## Billion Dollar Club



\$2.75B, Series C

hepsiburada.com

\$3.8B, IPO



\$1.2B, Series D



\$2.5B, Series F

peak

\$1.8B, Acquisition

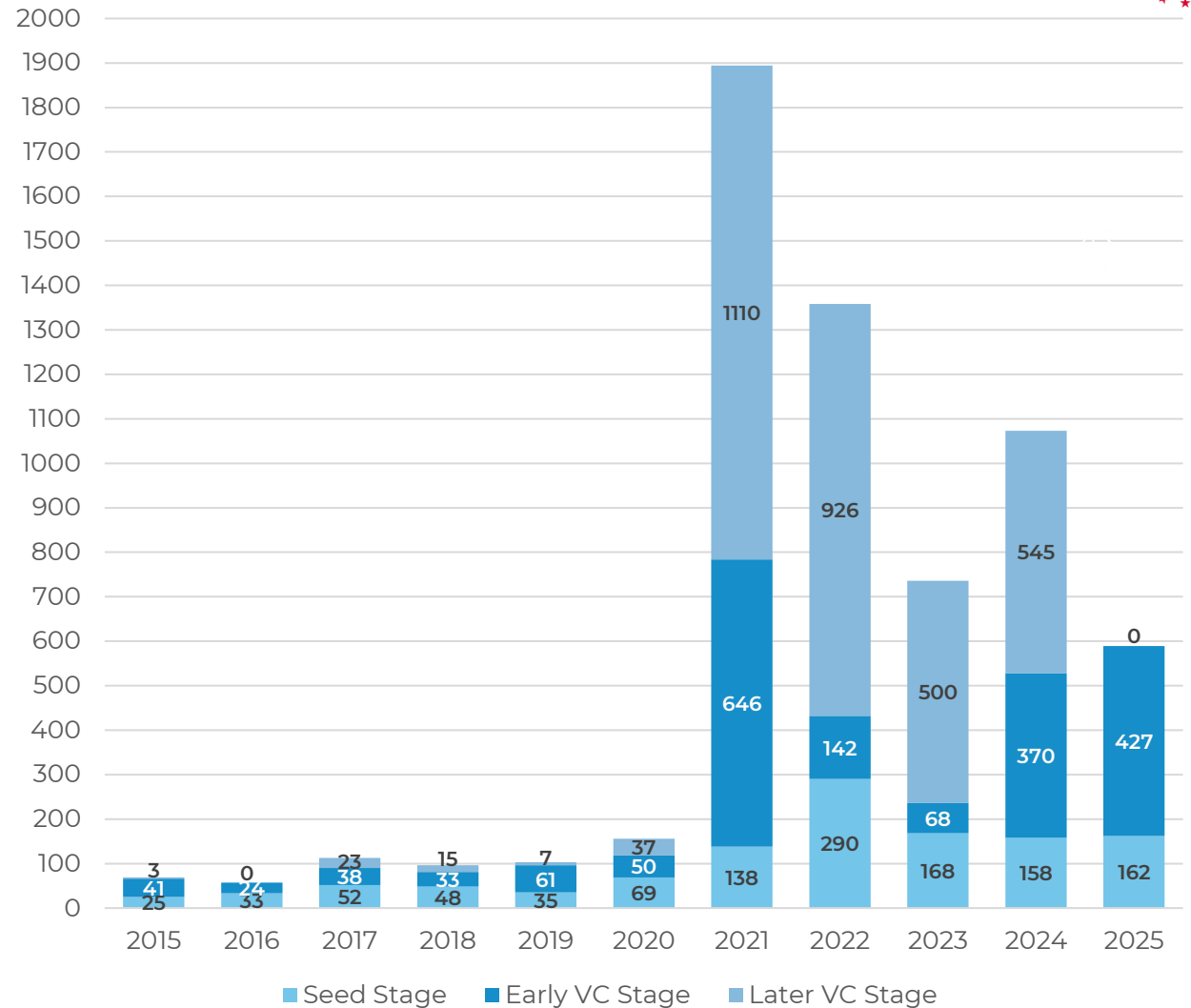
trendyol.com

\$16.5B, PE



\$1B, Acquisition

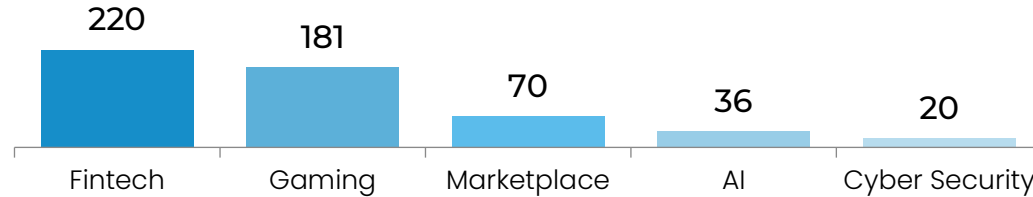
Angel & VC Deals  
Millions USD0



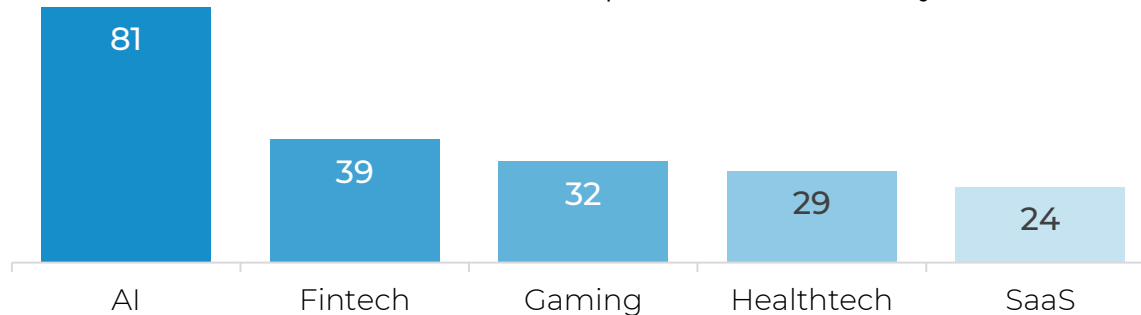
# Startup Ecosystem

## Most Funded Verticals in 2025

Top 5 funded verticals by deal value (\$M)



Top 5 funded verticals by deal count



## Acquisitions by Turkish startups in 2023-2025





# Women Entrepreneurship In Türkiye

Highest proportion of female founders among startups that have become unicorns in Europe

In 2025, 77 out of 306 investments were made to startups with female founders



hepsiburada.com

peak

trendyol

INSIDER ONE

loom



Women Entrepreneur Support Program planned and implemented by KOSGEB



Arya VC, established in partnership with Arya Women Investment Platform and Türkiye İş Bankası, aims to fund gender-balanced early-stage ventures operating in Türkiye.



EBRD allocated €600 million loan to Denizbank, Halkbank, Türkiye İş Bankası, Akbank, QNB Finansbank, Şekerbank, TEB, Vakıfbank, Yapı Kredi dedicated to Turkish women entrepreneurs for Women in Business programme.



IFC provides Garanti BBVA & TSKB a loan, that increases women's employment in order for women entrepreneurs to use it as working capital.



Türk Eximbank; "Women Entrepreneur Export Support Loan



WELEAD



İşbank carried out in cooperation with the Women's Power in Initiative Project, and TÜRKONFED and in partnership with UNWOMEN.

TOBB Women Entrepreneurs Board providing support to women entrepreneurs in realizing their entrepreneurial ideas with training, capacity building



To support and encourage the development of women's entrepreneurship and its ecosystem by guiding access to financial resources

KADEM

Women in Innovation  
More than 200 women entrepreneurs received training at innovation camp. 30 women entrepreneurs who were received the award, 13 established their own companies and received national and international awards.



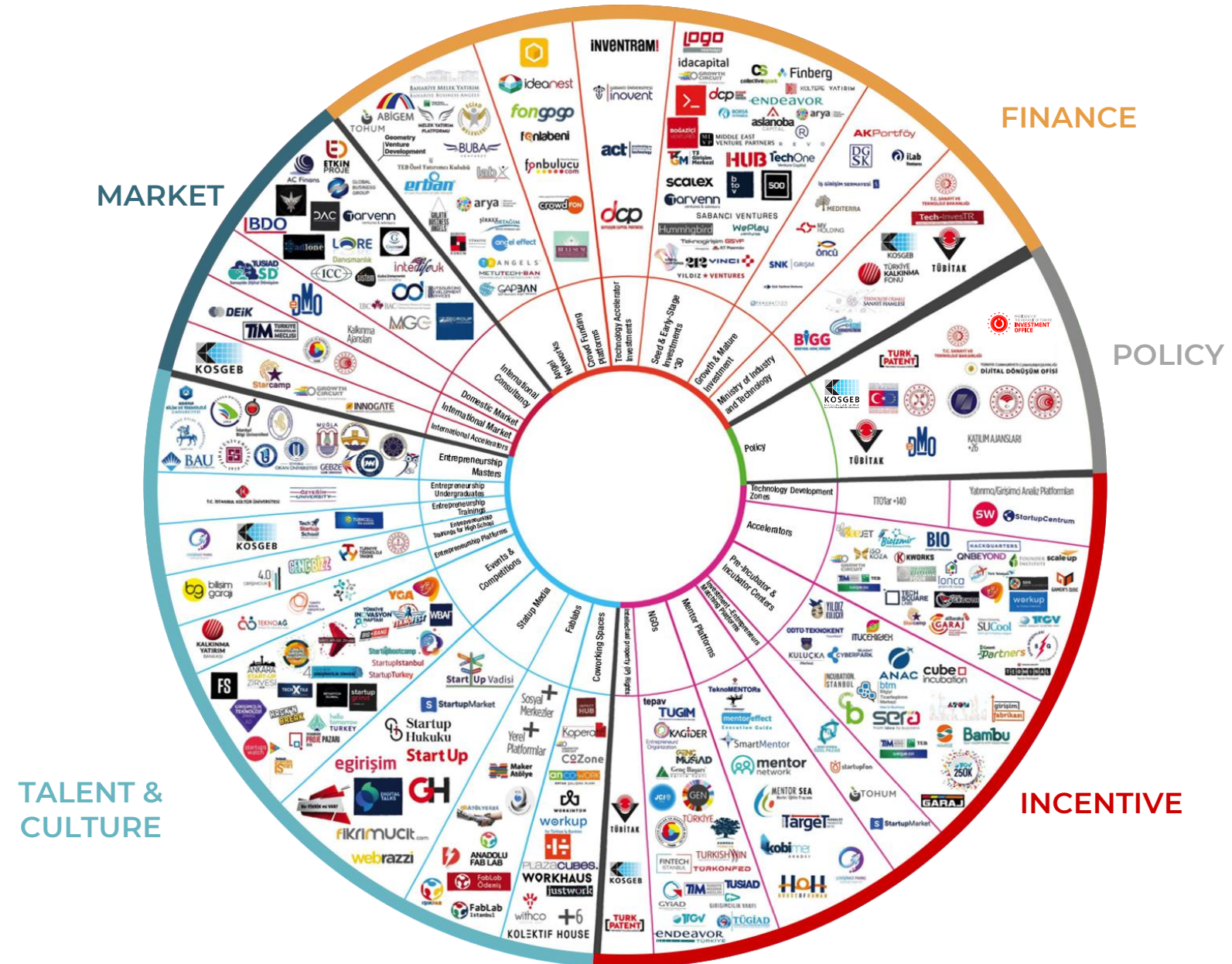
GİRİŞİMCİ İŞ KADINLARI DERNEĞİ  
THE ASSOCIATION OF ENTERPRISING BUSINESS WOMEN



TURKISH YİĞİN



# Startup Ecosystem Map





## Some Of The Largest Deals In 2015-2025

# Exit Activity in Türkiye



Delivery Hero bought  
Turkish Yemeksepeti  
for USD 589Million



Zynga bought 1010  
maker Gram Games  
for USD 250Million



Microsoft acquired  
open-source firm  
Citius Data



Zynga bought  
Turkish mobile  
game maker  
Peak for \$1.8bn



Chinese Alibaba  
paid USD 728Million for  
the %82 stake of the  
Turkish e-commerce  
company.



Carbon Health



Carbon Health  
acquired digital  
health platform  
Inofab Health



Zynga paid \$168M for  
the %80 stake of  
mobile game maker  
Rollic



Australia based  
software developer  
paid USD 295Million  
for TurkishOpsGenie.



SciPlay paid \$100M for  
the %80 stake of  
mobile game maker  
Alictus



Miniclip acquired  
\$100M for the mobile  
game maker Masomo



Amazon Web  
Services acquired  
cloud software  
startup DataRow



hepsiburada.com

Kaspi.kz acquired  
majority share of  
Hepsiburada for \$1.1B



Uber acquired meal  
and grocery delivery  
business Trendyol Go  
for \$700 M



CVC acquired majority  
shares of mobile  
games maker Dream  
Games



# AGENDA

## 6- Success Stories

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## Success Stories

# ICT Giants Have Been Investing In Türkiye For Decades



Founded in 1984, Cisco Systems, Inc. is an American multinational technology conglomerate that develops, manufactures and sells networking hardware, telecommunications equipment and other high-technology services and products. The largest networking company in the world, Cisco's FY'24 Revenue is USD 53 billion with an employee count of 90,000 globally.

Cisco has been present in Türkiye for years and has invested in various areas, one of which is training programs in the tech industry through the Cisco Networking Academy Program. Trainings have been provided through this program since early 2000s.



Ericsson, a world leader in communications technology and service, works in 180 countries and employs more than 111,000 experts in line with its vision of "the Networked Society". Ericsson's services, software, and infrastructure – particularly in mobility, broadband, and the cloud – enable the telecoms industry and other sectors to conduct better business, increase efficiency, improve user experience, and capture new opportunities.

Ericsson Türkiye's R&D team, consisting of more than 550 R&D and technical support employees based in its Istanbul, İzmir and Ankara locations, provides services through innovative activities in various fields of information and telecoms technologies. In those centers, more than 140 R&D projects, 20 of which are supported by TÜBİTAK, are being implemented. Ericsson TÜRKİYE participates in many international R&D projects together with SMEs and universities in TÜRKİYE. Ericsson Research is a global organization that develops new patentable technologies and system concepts, which drive the standardization of future mobile systems, innovating and re-shaping the industry 5-10 years ahead. Ericsson Research has operations in eleven countries including TÜRKİYE



American multinational information technology company that not only provides hosting and consulting services from computers to nanotechnology, but also manufactures and markets computer hardware, middleware and software.

IBM has been operating in Türkiye since the 1930s, and since then has participated in various projects. Projects have included working together with Turkish local bodies, both governmental and NGO, to strengthen the governance practices of community organizations who are implementing a range of local initiatives that promote economic development and growth.



## Success Stories

# ICT Giants Have Been Investing In Türkiye For Decades



SAP SE is a German-based European multinational software corporation that makes enterprise software to manage enterprise resources, business operations and customer relations.

Founded in 1972, SAP currently has operations in over 180 countries and has labs in only 20 countries, one of which is in TÜRKİYE.

Within this context, a significant portion of the SAP Data Hub solution, which includes artificial intelligence and machine learning applications, is developed by Turkish engineers at the SAP Development Center and exported to the whole world.

SAP SE sees TÜRKİYE as the "main hub" for digital transformation and Turkish engineers carry out "mega" projects in Turkic republics, Russia, Africa, the Middle East and Europe



Chinese multinational networking, telecommunications equipment, and services company.

Founded in 1987, Huawei is currently the largest telecommunications equipment manufacturer in the world, as well as the second largest smartphone manufacturer in the world.

Huawei began its operations in TÜRKİYE in 2002. Currently, in its TÜRKİYE office, Huawei has over 1,500 employees, an R&D center which is second-largest R&D center outside of China, training center, and a customers solutions and integration experience center.



Alibaba Group is the world's largest online and mobile commerce company. Alibaba describes its mission as to make it easy to do business anywhere.

In 2018, Alibaba group acquired the majority shares of TÜRKİYE's leading e-commerce platform Trendyol which is serving over 16 million customers. It is also the fastest growing e-commerce company in the region with over 90 million monthly visits.

Trendyol is the largest internet employer in TÜRKİYE with a team over 2300 people. Trendyol has an R&D center with an ever-growing R&D team that focuses on NLP, real-time data analysis, machine and deep learning, data visualization and big data.



## Success Stories

# ICT Giants Have Been Investing In Türkiye For Decades



American multinational technology company that develops, manufactures, licenses, supports and sells computer software, consumer electronics, personal computers and related services.

Founded in 1975, in 2024, Microsoft reported revenue was 244 billion dollars with over 144,000 employees.

Microsoft Türkiye is used as a managing center for the Middle East and Africa regions, composed of 79 countries.

Microsoft acquired Citus Data Inc., a Software Development company that was founded in Türkiye and then expanded internationally. Upon acquisition, Microsoft continued investing Citus's team in Türkiye and expanded their responsibility by giving them additional products to develop that are core to Microsoft's Azure Data platform



As a B2B technology innovation leader, Nokia pioneering networks that sense, think and act by leveraging work across mobile, fixed and cloud networks. In addition, Nokia create value with intellectual property and long-term research, led by the award-winning Nokia Bell Labs. Service providers, enterprises and partners worldwide trust Nokia to deliver secure, reliable and sustainable networks today and to create the digital services and applications of the future. Nokia operates in Türkiye for several decades and adheres to a long-term integration strategy aiming development of innovative technologies, creation of digital economy and a digital society.

Nokia has a partnership agreement with Karel, Turkish electronic manufacturer, to produce 4.5G and 5G base stations in Türkiye. Local manufacturing of Nokia base stations started and ongoing since May 2022. Jointly with Türk Telekom and Arçelik Nokia runs 5G@EndTech program to stimulate development of the local 5G use-cases for industries. Nokia has a strategic partnership agreement with MEXT Technology Center, to collaborate in the context of digitalization of the industrial manufacturing sector in Türkiye with Nokia 5G infrastructure.



ZTE, Chinese multinational ICT solutions vendor acquired nearly half of Turkish Netaş' shares in 2017. This is considered one of the biggest transactions in technology development investments in Türkiye.

2020 was the year that started reaping the synergic benefits of ZTE and Netaş working together. Netaş achieved 170% growth in telecommunications technologies.

Localization efforts, conceived in 2019 with FTTx systems, endure with many other products of ZTE. The goal here is to undertake local production of ZTE staples by way of transferring the knowhow to Türkiye.

Another joint step in this direction was for the IPTV technologies. Netaş started building ZTE's new generation IPTV platform in Türkiye

# INVEST IN TÜRKİYE



**TÜBİSAD**  
INFORMATICS INDUSTRY ASSOCIATION

Contact  
Ahmet DİLER  
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PRESIDENCY OF  
THE REPUBLIC OF TÜRKİYE

**INVESTMENT &  
FINANCE OFFICE**



/InvestTurkey



/invest-in-Turkey



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