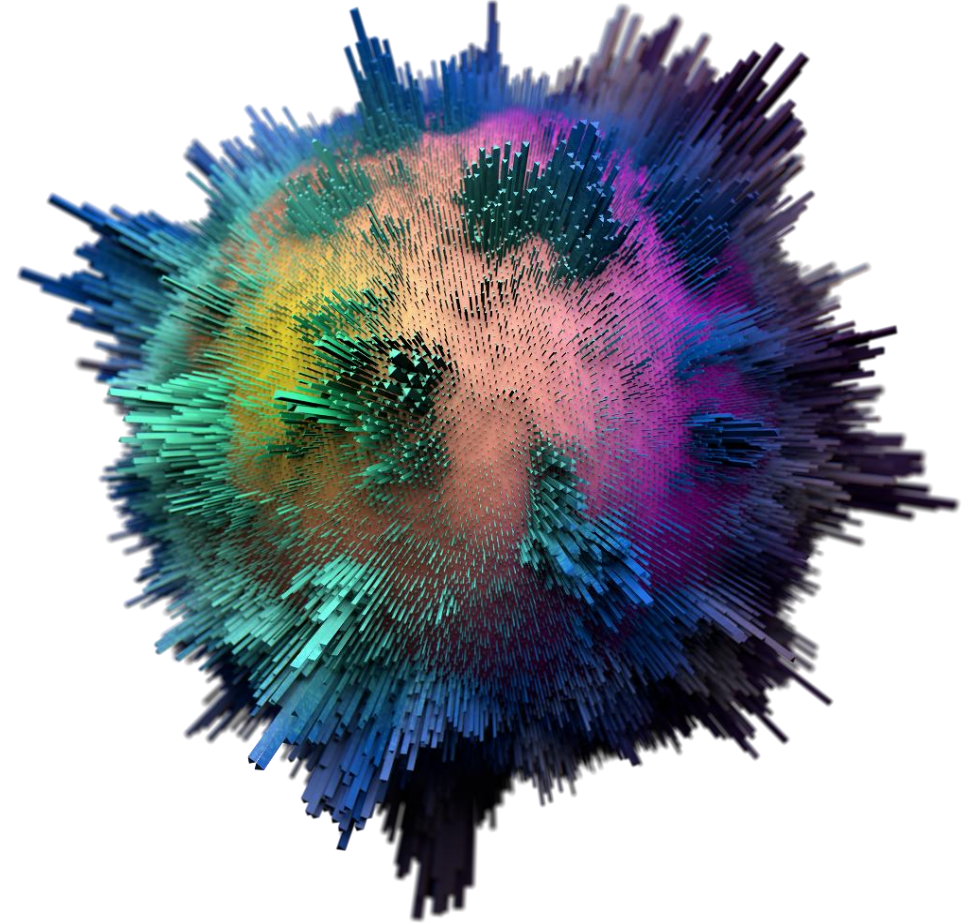
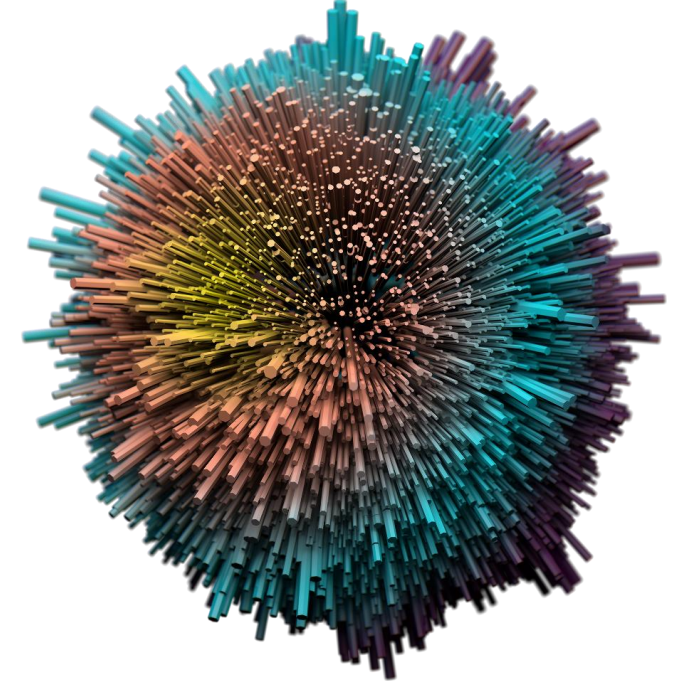


Information and Communication Technologies Sector 2025 Market Data

June 2026



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Forewords

Chairman's Message

Empowering Türkiye Through Technology

Technology is no longer just an industry. It is a strategic driver of competitiveness, economic growth, and social prosperity. Advances in artificial intelligence, cloud computing, data centers, and cybersecurity are reshaping industries and influencing the future position of nations.

Türkiye has the key strengths needed to benefit from this transformation. A skilled workforce, a strong entrepreneurial culture, a strategic location, and a growing technology ecosystem continue to strengthen our position as a regional technology hub.

At TÜBİSAD, we believe that Türkiye's future depends on technology, and the future of technology depends on a strong ecosystem. Success today is created through collaboration among software companies, telecommunications providers, cloud service providers, data center operators, startups, universities, and public institutions. Together, these stakeholders form the foundation of Türkiye's digital future.

The findings of this report demonstrate the continued growth of the Information and Communication Technologies sector. In 2025, the sector reached a market size of TRY 2.1 trillion and increased its share of the national economy to 3.38 percent. Exports have grown significantly over the past five years, supported by strong software driven expansion. These results highlight Türkiye's progress as a technology producing and globally competitive economy.

The report also shows that artificial intelligence has become a key driver of economic transformation. Organizations across sectors are increasingly adopting AI to improve efficiency, strengthen decision making, and create new sources of value. This reflects the growing maturity of Türkiye's digital ecosystem.

Our goal is to accelerate technology driven growth, create higher value, and strengthen Türkiye's global competitiveness. Achieving this vision requires continued investment in talent, innovation, and digital capabilities, supported by strong collaboration across the ecosystem.

Türkiye's digital future will be shaped by the collective efforts of businesses, entrepreneurs, academia, and public institutions. By working together, we can unlock new opportunities and further strengthen our position in the global technology landscape.

On behalf of TÜBİSAD, I would like to thank the Ministry of Industry and Technology, the Information and Communication Technologies Authority, Context, Deloitte, TÜBİSAD members, and all contributors to this report. We hope this study will serve as a valuable reference for the sector and support Türkiye's future growth.



Mehmet Ali Tombalak

TÜBİSAD Chairman of the Board

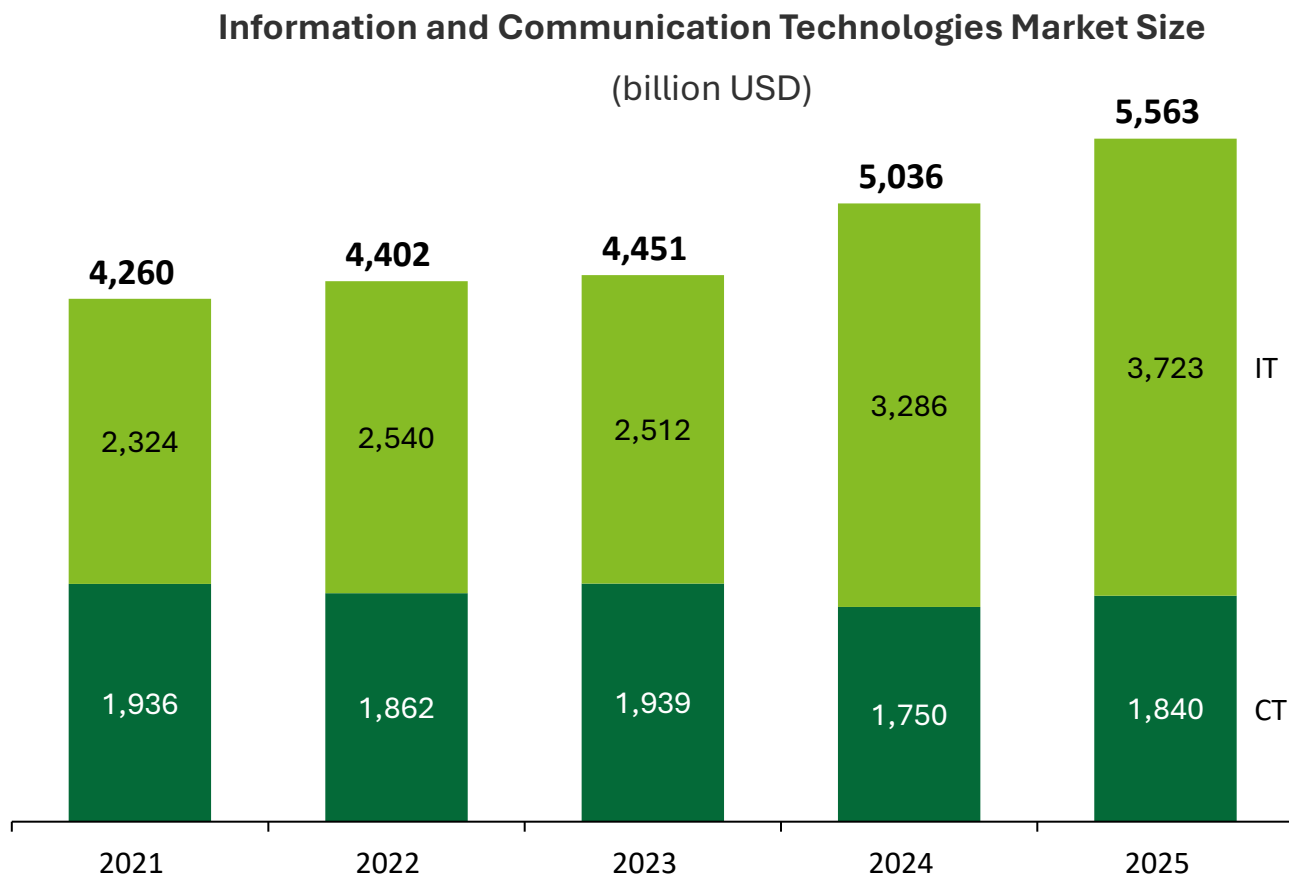
Global Market Size

Global ICT Market Size in 2025

The global ICT market reached USD 5.5 trillion in 2025, supported by 10.5% growth. Information technologies market was the primary driver of growth, growing by 13.3%, while the communication technologies market recorded growth of 5.1%.

Information and Communication Technologies Market Size

(billion USD)



2021-2024 Compound Annual Growth Rate 2024-2025 Annual Growth Rate

Total ICT Market	5.7%	10.5%
Information Technologies	12.2%	13.3%
Communication Technologies	-3.3%	5.1%

Note: Totals may vary due to rounding.
 Source: Gartner, Deloitte Analysis
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Future Expectations and Global ICT Market Growth Forecast

The global ICT market is expected to reach USD 6.3 trillion in 2026 and continue growing at an annual rate of 8%, reaching USD 8.7 trillion by 2030.

Driving Forces



AI infrastructure investments remain a **key driver of growth** in the global ICT market. Expanding hyperscale cloud environments and data center investments are **accelerating demand for high performance processors, semiconductors and memory solutions**, particularly within the IT segment.



Investments in **generative AI applications, model development platforms and AI-enabled software solutions** are positioning software as one of the fastest growing components of the global ICT market.



In parallel with the demand for operational efficiency, automation, decision support systems and advanced analytics; companies **continue to support** market expansion by **increasing their technology spending**.

Key Constraints



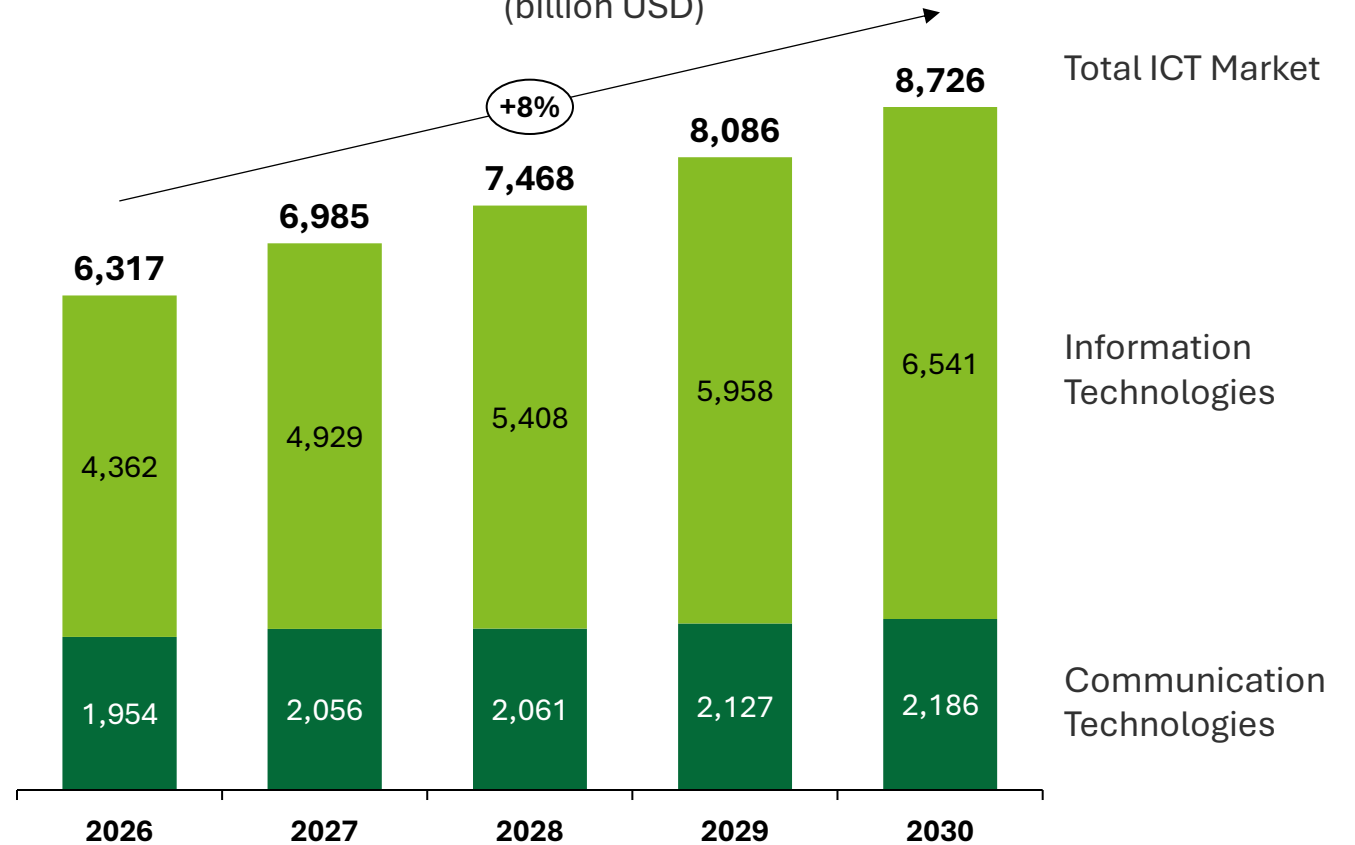
Organizations continue to invest in AI, while **maintaining a cautious approach toward return on investment and long-term sustainability**.



Global trade policies, geopolitical tensions, and currency volatility continue to create uncertainty in the supply chains and investment decisions of technology companies.

Global ICT Market Size

(billion USD)



Note: Totals may vary due to rounding.

Source: Gartner, Deloitte Analysis

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Stakeholders of the Study

Project Consultant

Deloitte.

Project Data Partners

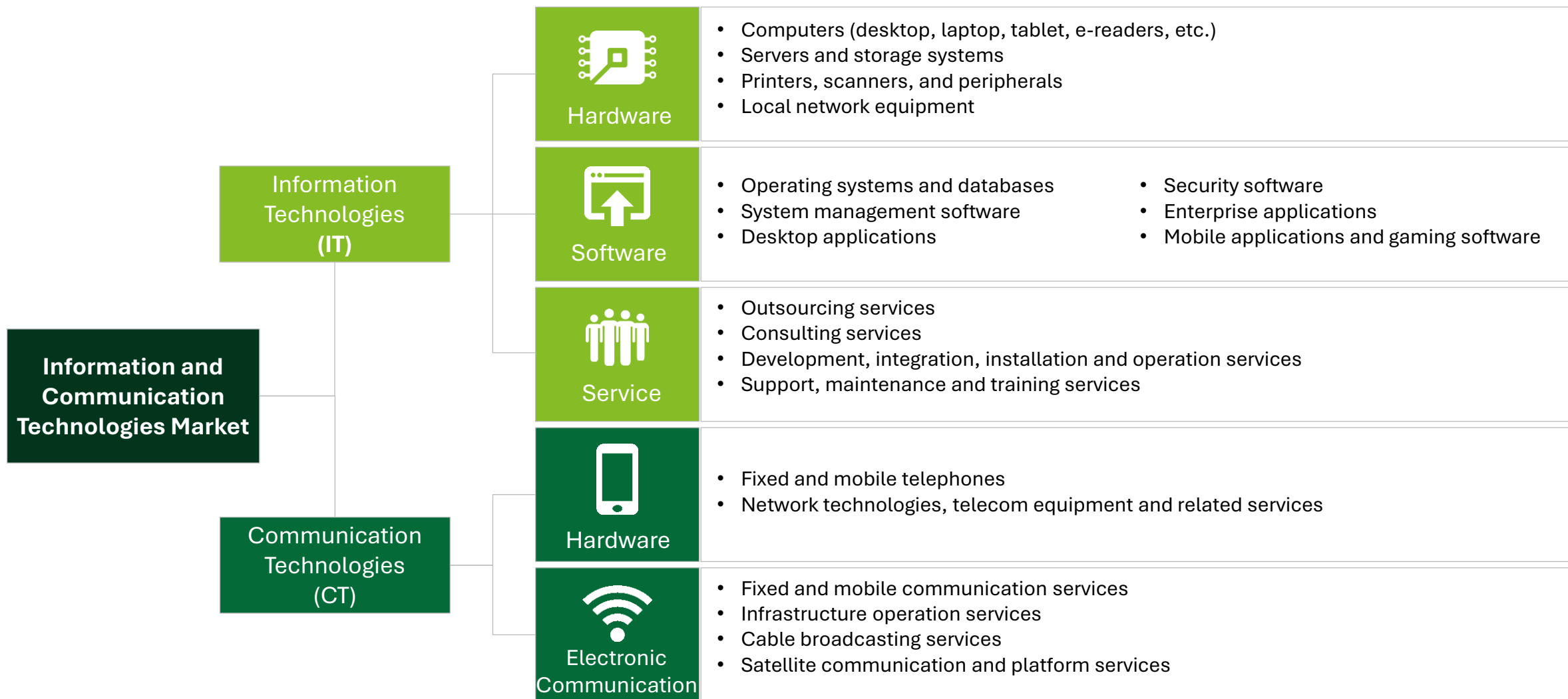


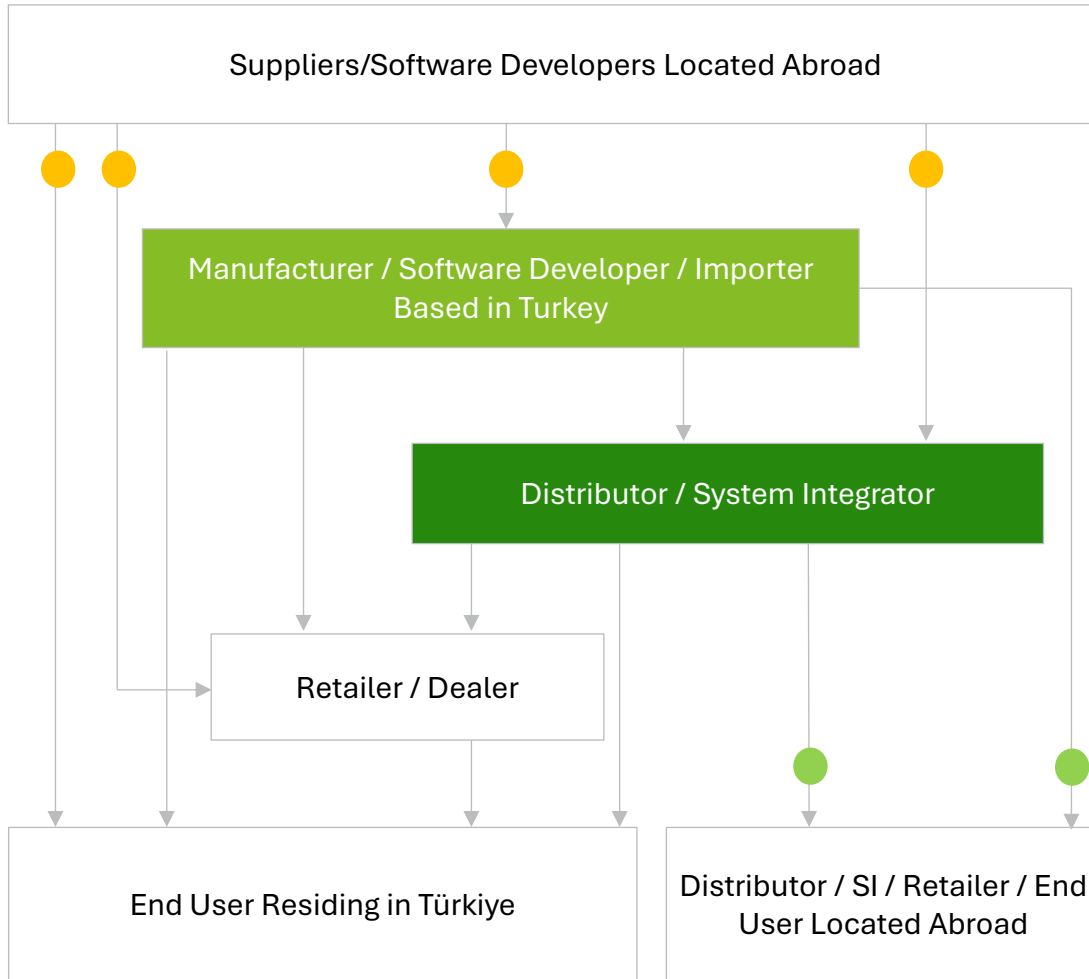
CONTEXT

Scope of the Study

Scope of the Study

TÜBİSAD’s Market Data Study, conducted since 2012, has been carried out in collaboration with Deloitte for the past 13 years under a consistent scope and methodology.





The market size was calculated and validated using a bottom-up approach.

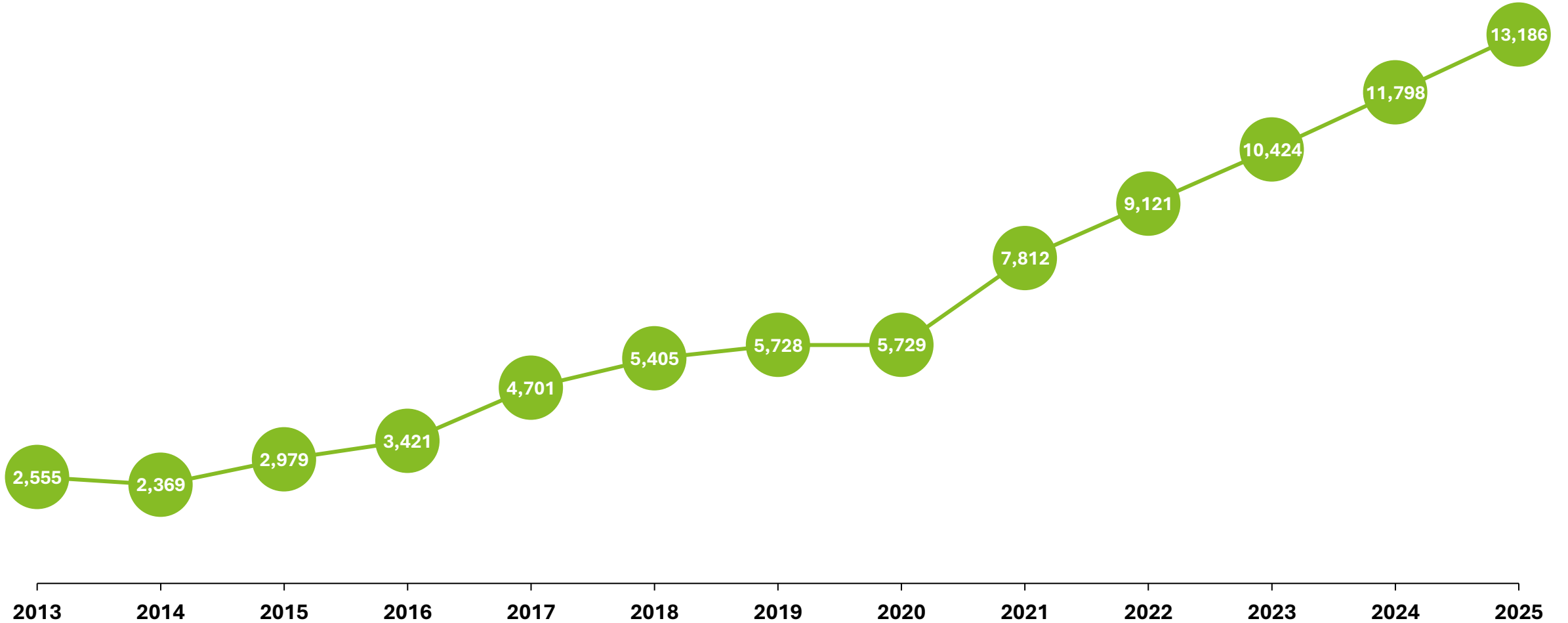
In addition to data collected through industry surveys, the analysis leverages data from institutions including **BTK, Context, SASAD** (Defence and Aerospace Industry Manufacturers Association), and the **Ministry of Industry and Technology**.

- While collecting the data, the size of the sector is separated in a way that prevents duplicate calculation.
- Company sizes were collected with different breakdowns.
 - End user vs. intermediary sales
 - Import vs. export
 - Origin of products and services
 - Technopark share

● = Import
● = Export

Industry Players Included in the Study

All data collected within the scope of the market data study are provided by our sector companies. The number of companies included in our study reached 13,186 in 2025.

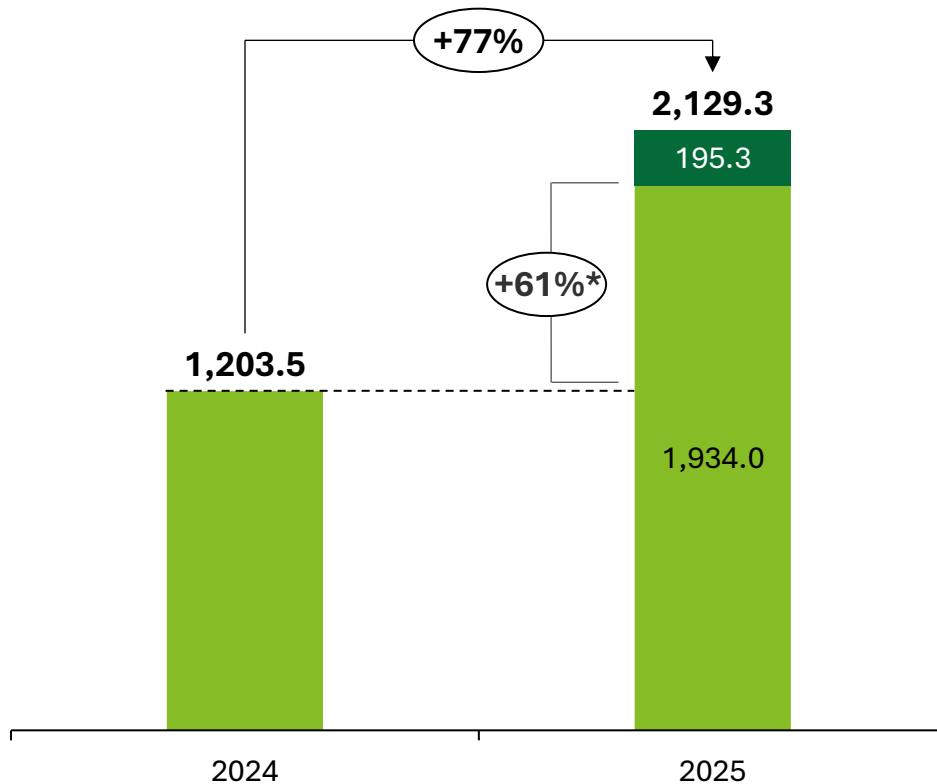


Information and Communication Technologies Sector in Türkiye

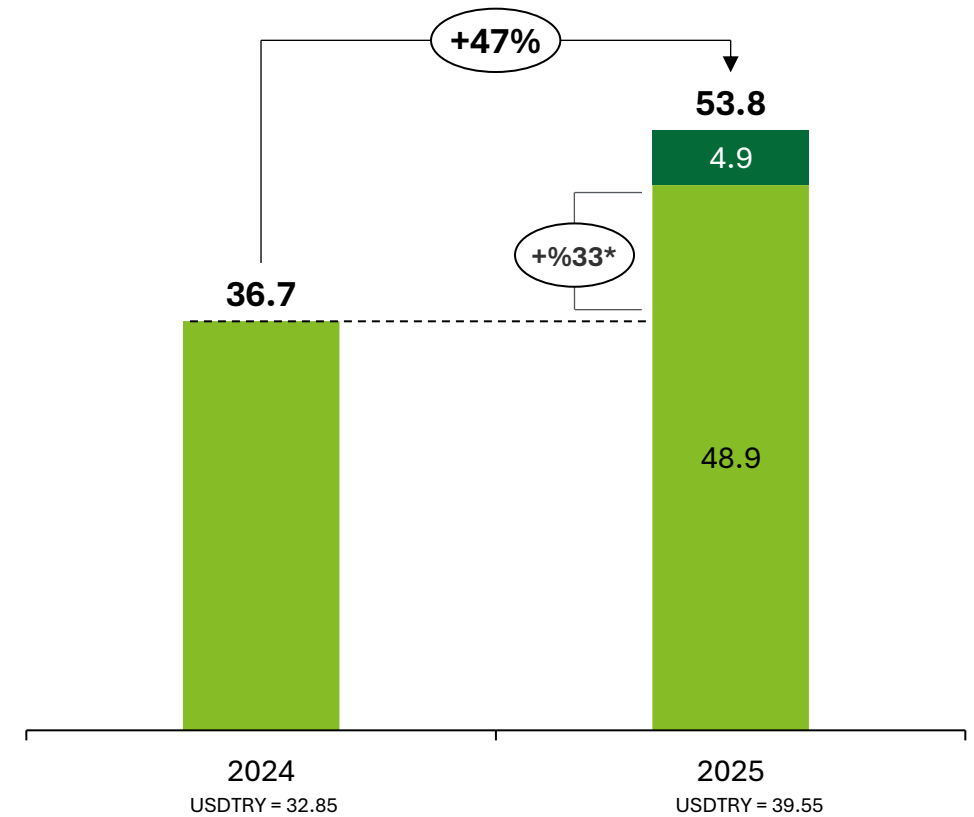
Total Market Size (TL billion)

In 2025, the market size reached 2 trillion 129.3 billion TL. (53.8 billion USD).

Türkiye's ICT Market Size (billion TL)



Türkiye's ICT Market Size (billion USD)



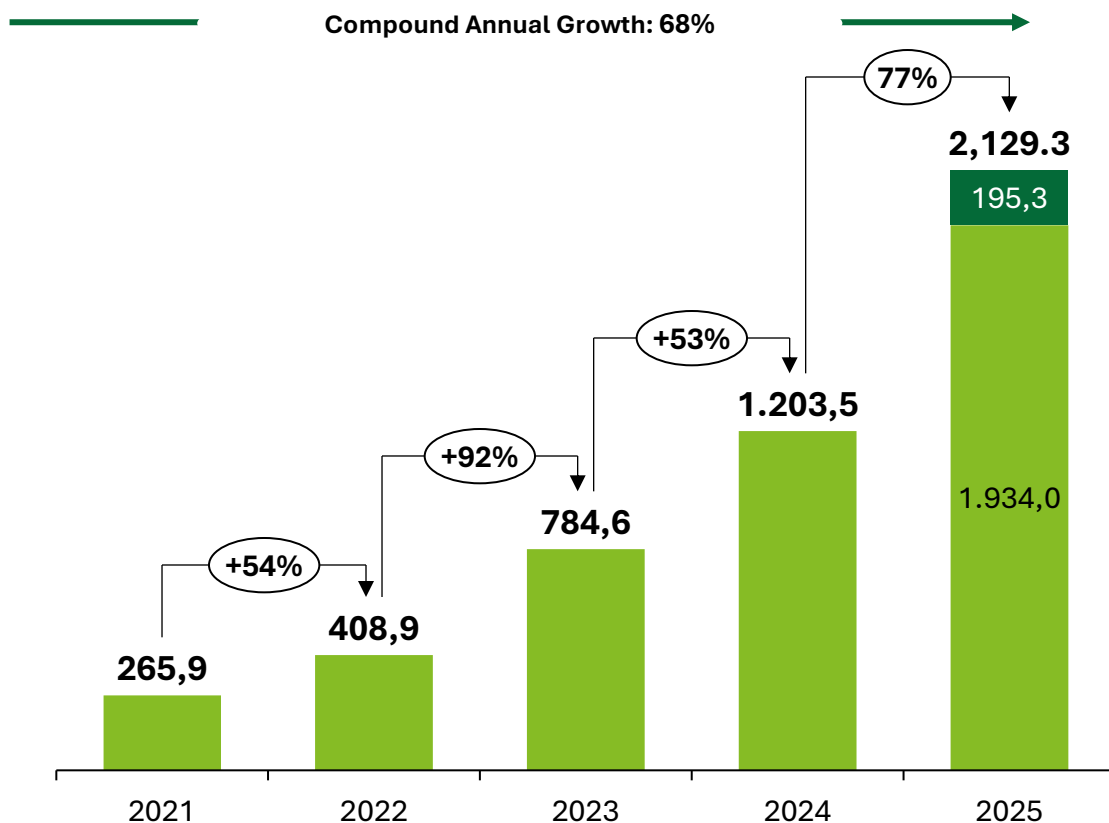
*: Annual changes refer to comparable growth rates.

Note: Totals may differ due to rounding.

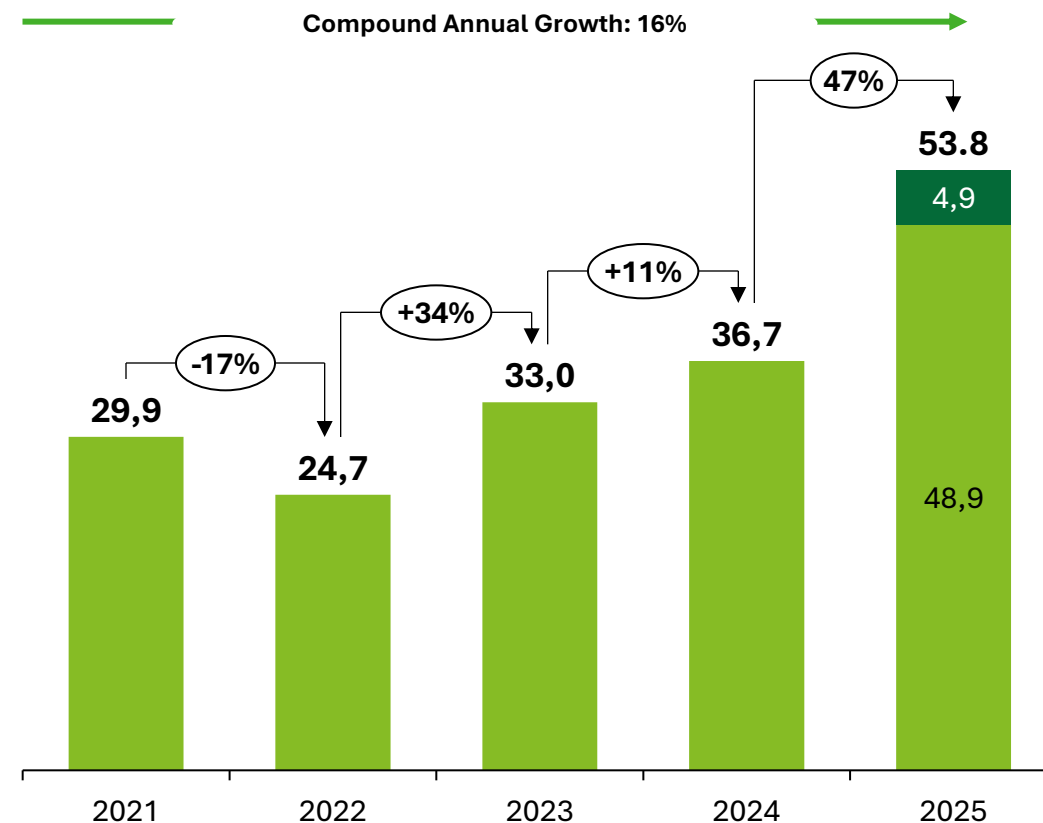
Total Market Size (billion TL and USD)

Between 2021 and 2025, the average annual growth of the sector was around 68% in TL terms. In USD terms, growth was approximately 16%.

Türkiye's ICT Market Size Development
(billion TL)



Türkiye's ICT Market Size Development
(billion USD)



The size of the newly added companies to the measurement

The size of the newly added companies to the measurement

*Annual changes refer to comparable growth rates.

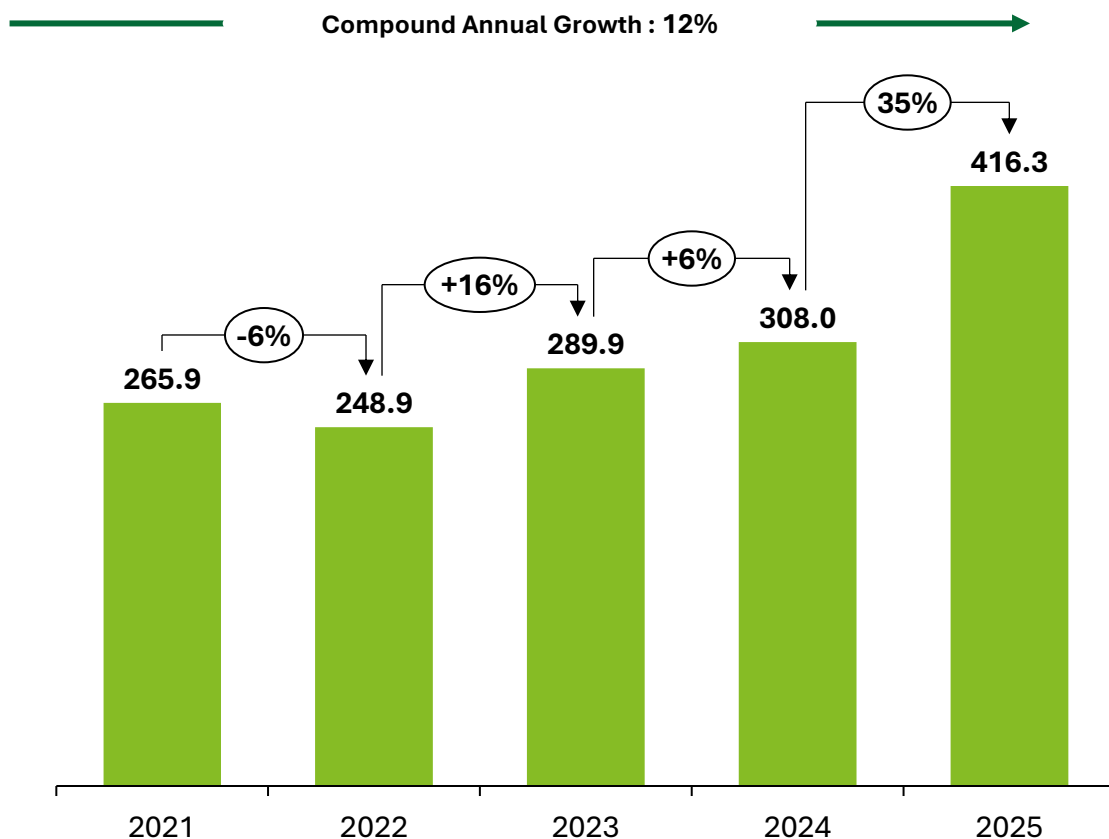
Note: Totals may differ due to rounding.

Total Market Size (billion TL and USD)- Inflation Adjusted Values

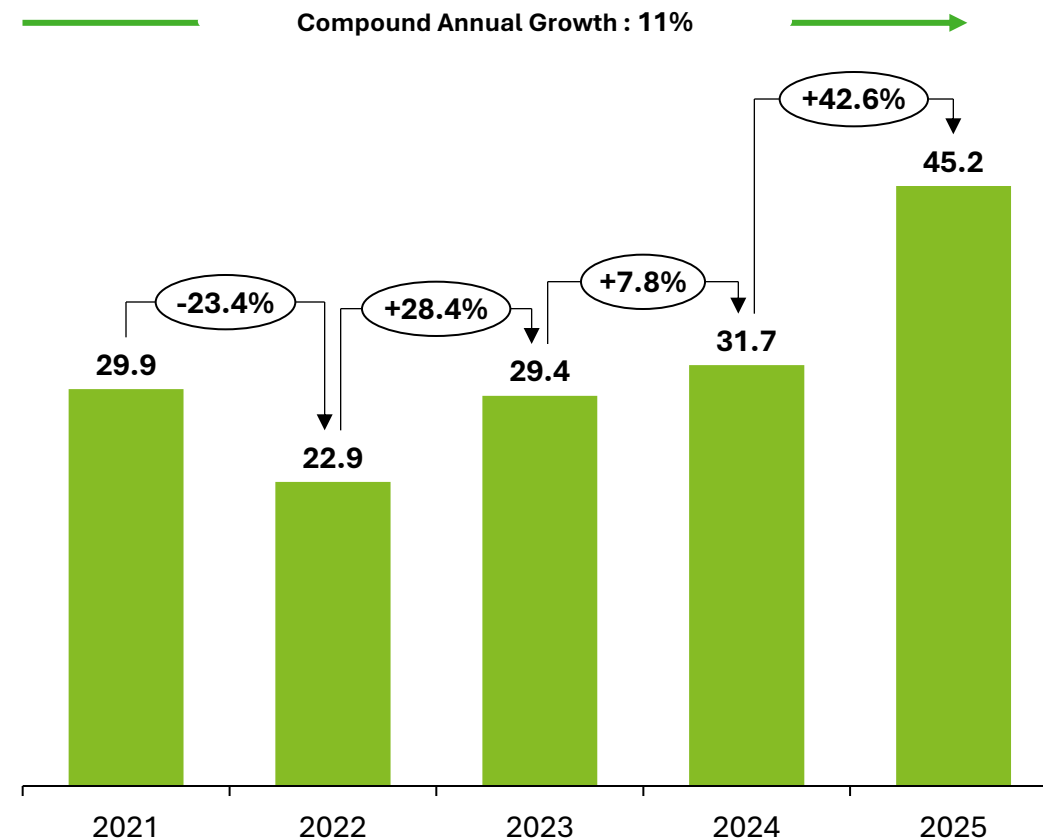
Inflation-adjusted figures indicate that the ICT market has achieved sustained double-digit real growth over the past five years, both in TL and USD terms.

ICT Market Size Development

(billion TL, real value)



(billion USD, real value)



* In the calculation of real value, 2021 was accepted as the base year.

Note: Totals may differ due to rounding

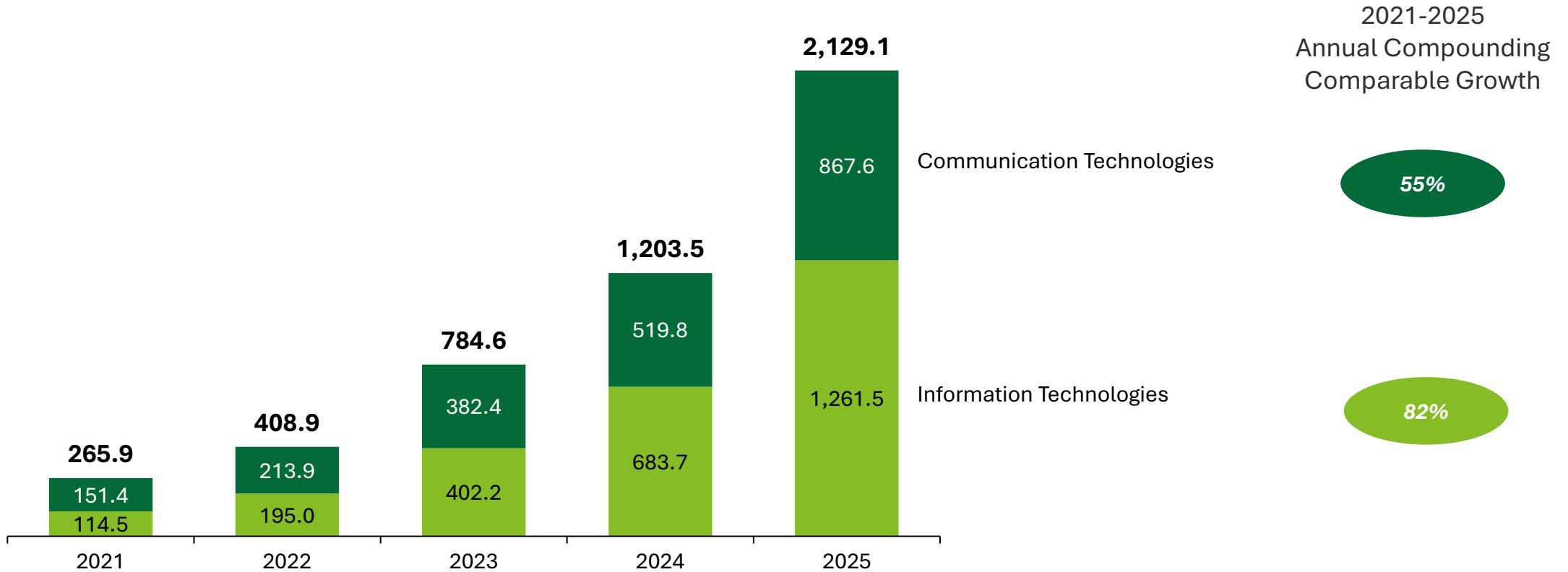
Source: TÜİK, IMF

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Information and Communication Technologies Market Breakdown – TL billion

Information Technologies grew faster than Communication Technologies between 2021 and 2025 by reaching a market size of 1 trillion 261.5 billion TL in 2025, increasing the gap with Communication Technologies (867.6 billion TL) in terms of market size.

Information and Communication Technologies Market Size
(billion TL)



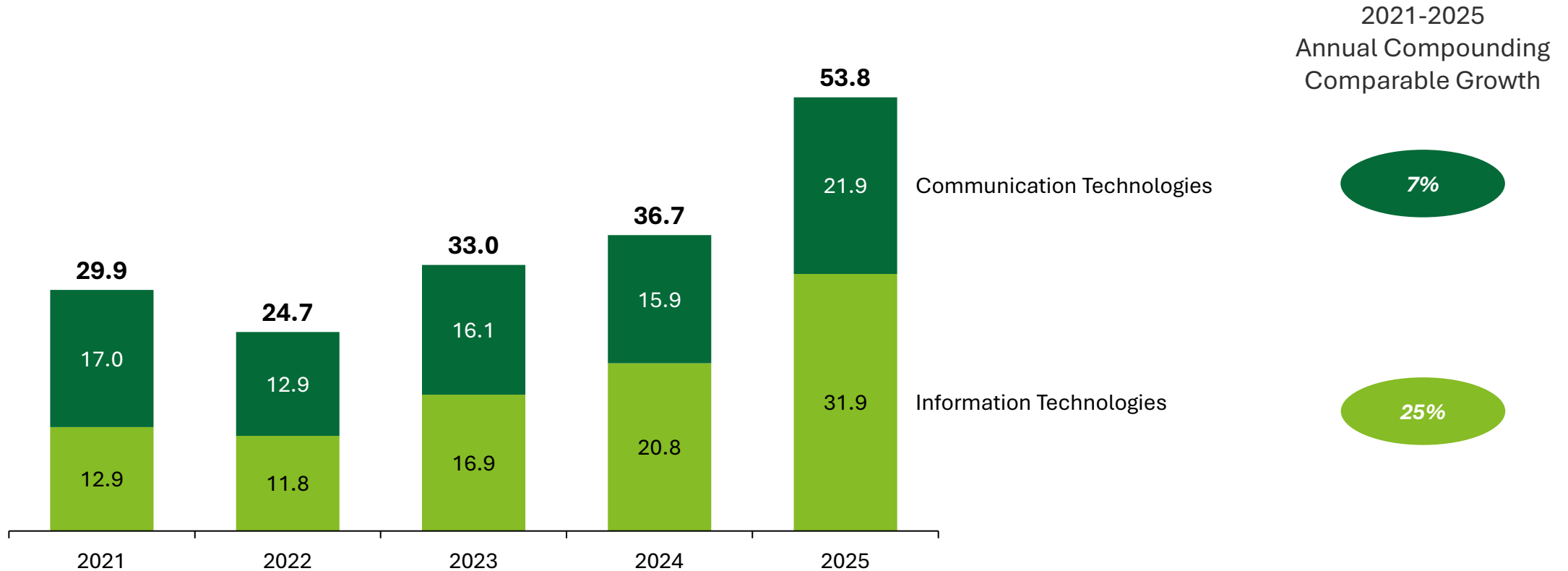
Note: Totals may differ due to rounding.

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Information and Communication Technologies Market Breakdown – USD billion

Information Technologies became the primary driver of market growth between 2021 and 2025, maintaining strong and sustainable growth momentum. In contrast, Communication Technologies segment recorded a more moderate growth performance.

Information and Communication Technologies Market Size
(billion USD)

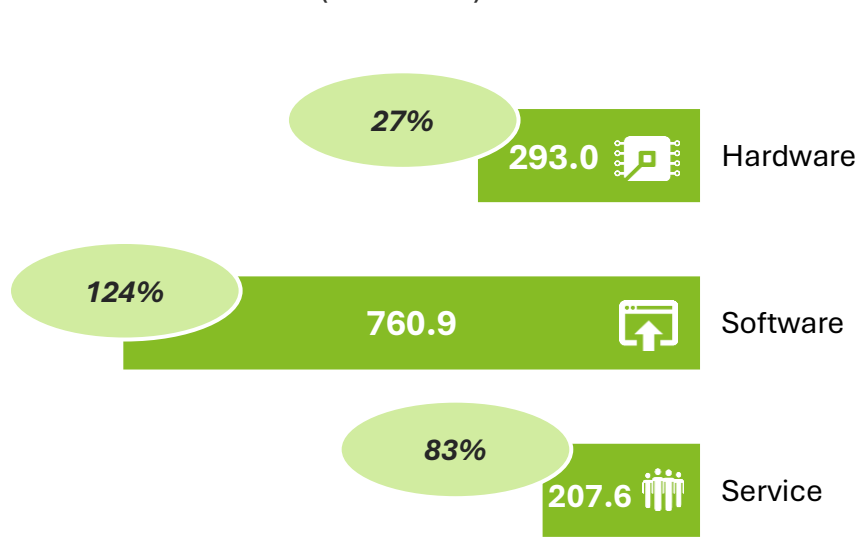


Note: Totals may vary due to rounding.

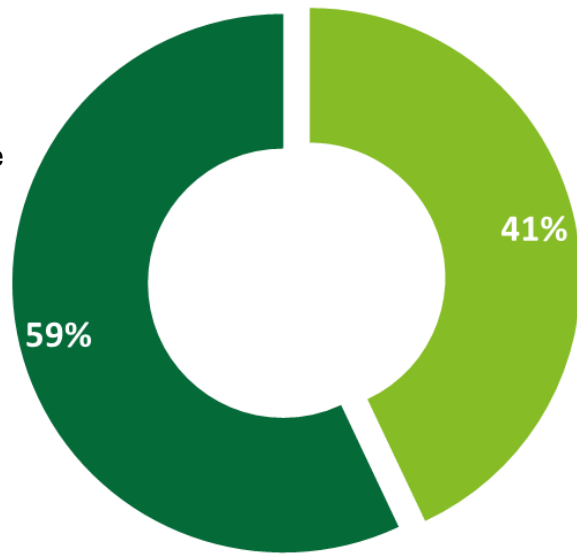
ICT Sector Sub-categories (TL Billion)

Information Technologies

(TL billion)



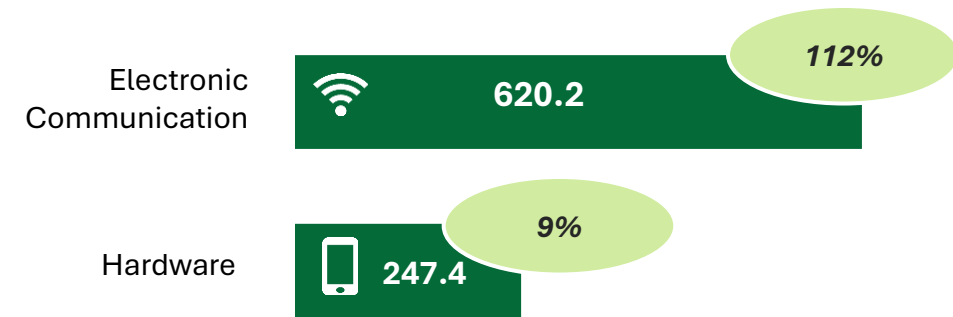
2024-2025
Comparable Growth Rate



2025

Communication Technologies

(TL billion)

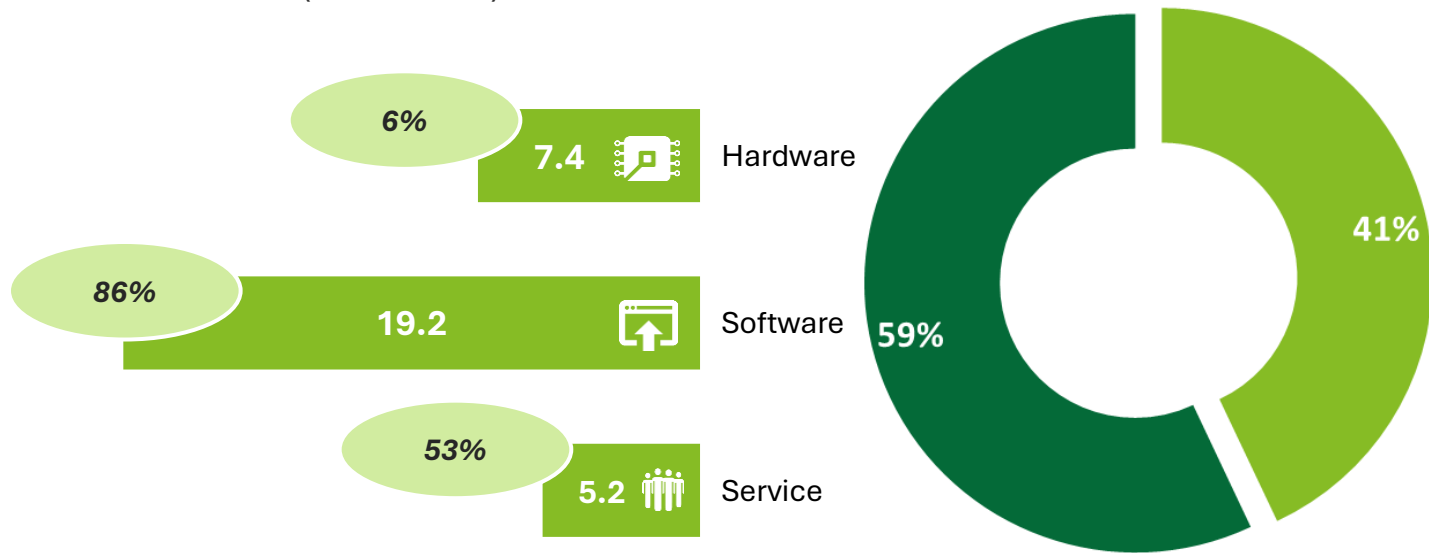


2024-2025
Comparable Growth Rate

Note: Totals may vary due to rounding.

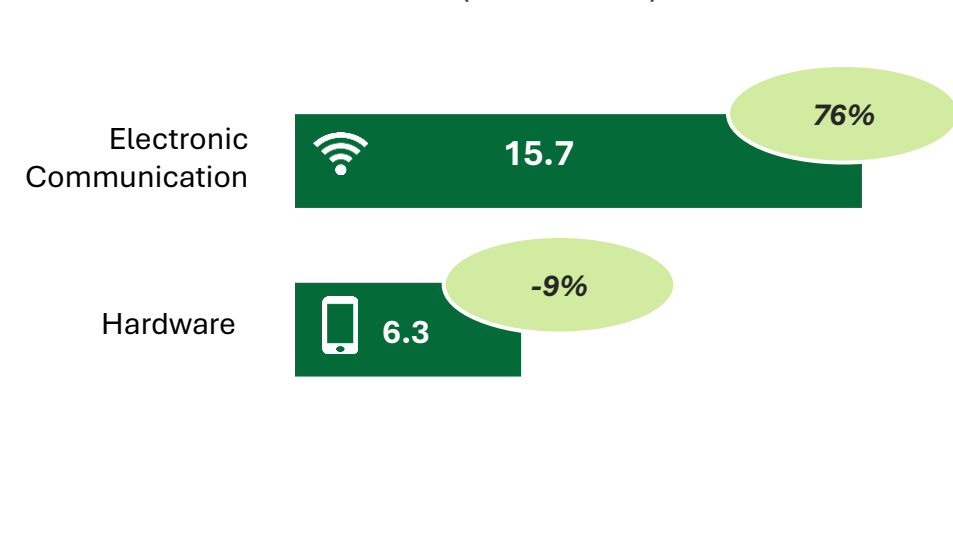
ICT Sector Sub-categories (USD billion)

Information Technologies (USD billion)

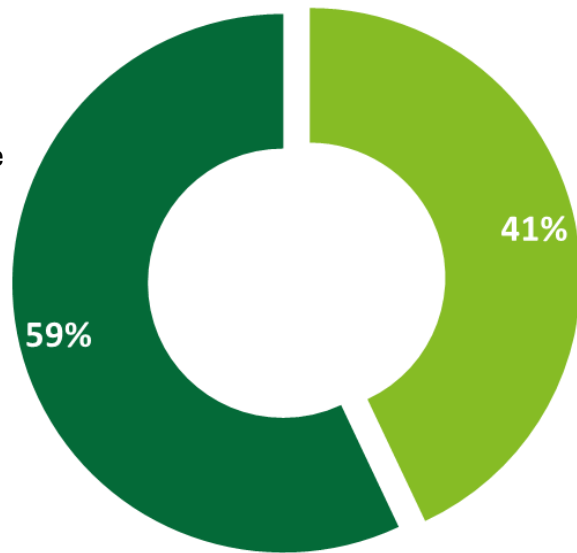


2024-2025
Comparable Growth Rate

Communication Technologies (USD billion)








2024-2025
Comparable Growth Rate



2025

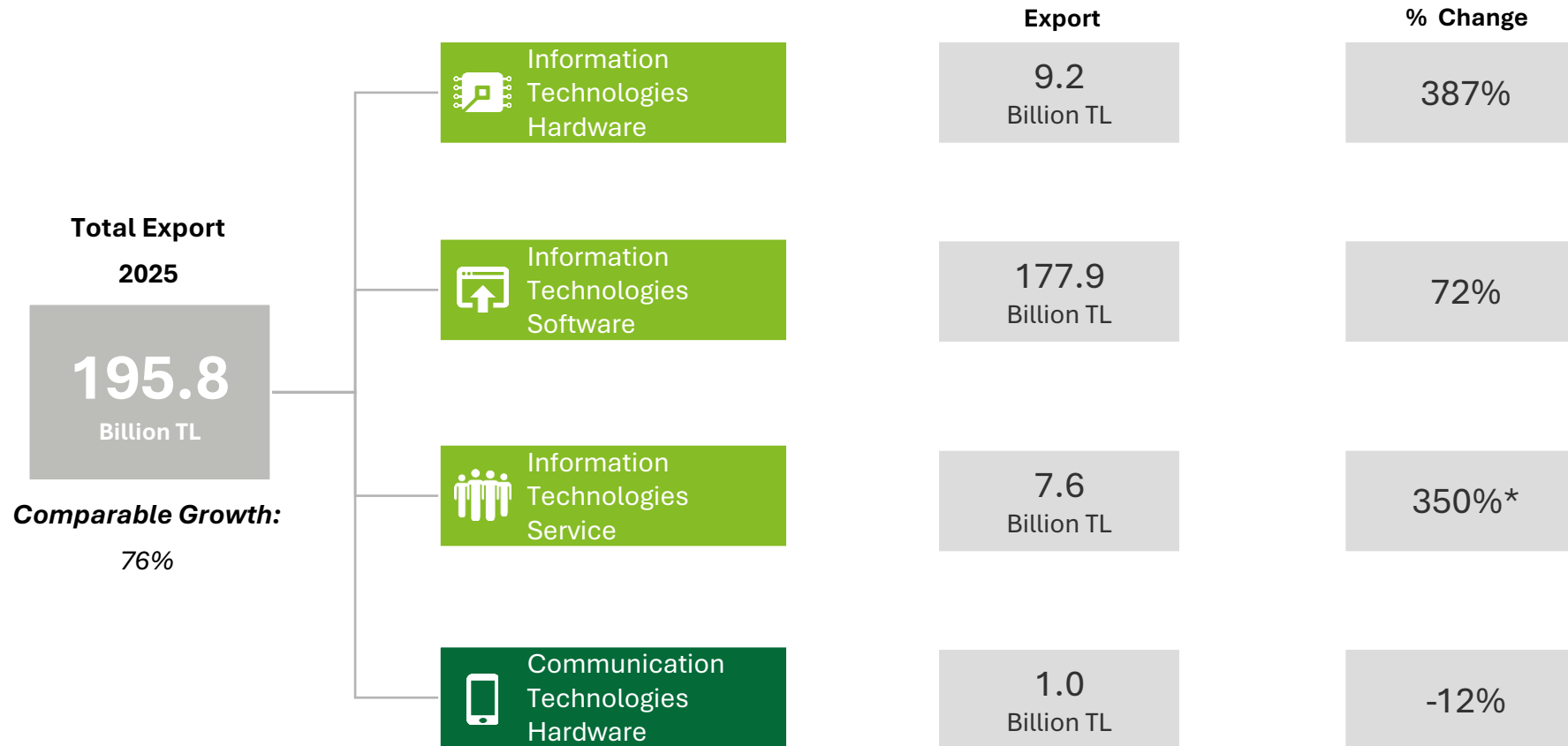
Technology Development Zones

Technoparks in Türkiye	2024	2025	Change
 Number of Technoparks	105	114	8.6%
 Number of Companies	11,550	12,996	12.5%
 Number of Employees	118,500	130,490	10.1%
 Total Turnover (TL Billion)	371.5	738	98.6%
 Total Export (TL Billion)	98.6	172	74.4%
Turnover / Company (TL Million)	<i>32.1</i>	<i>56.8</i>	<i>76.9%</i>
Turnover / Employee (TL Million)	<i>3.14</i>	<i>5.65</i>	<i>79.9%</i>
Export / Technopark (TL Million)	<i>938.6</i>	<i>1,509.1</i>	<i>60.8%</i>
Export / Turnover	<i>27%</i>	<i>23%</i>	<i>-4%</i>
Technopark Turnover / Total Turnover (TL Billion)	<i>30.9%</i>	<i>34.7%</i>	<i>3.8%</i>

Source: Ministry of Industry and Technology of the Republic of Türkiye

Export of ICT Sector

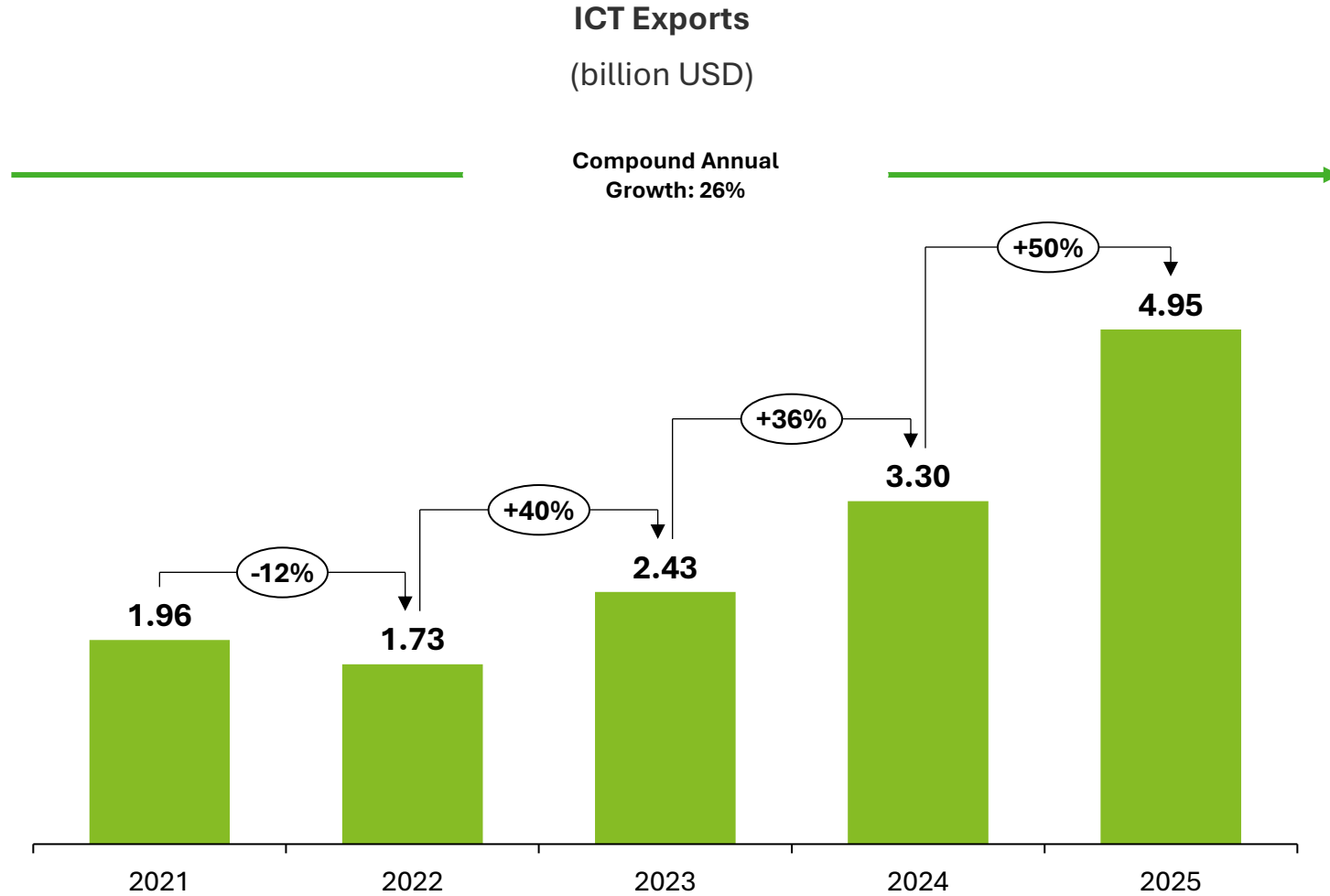
IT-Software segment continues to account for the largest share of total exports. At the same time, the notable growth observed in the IT-Hardware and IT-Services segments stands out as a significant development.



* The recorded growth has been largely influenced by the addition of newly included companies. Annual changes represent comparable growth rates.
 Note: Totals may differ due to rounding.

Export of ICT Sector

The total exports of the sector grew by an average of 26% annually in USD terms between 2021 and 2025, reaching USD 4.95 billions.

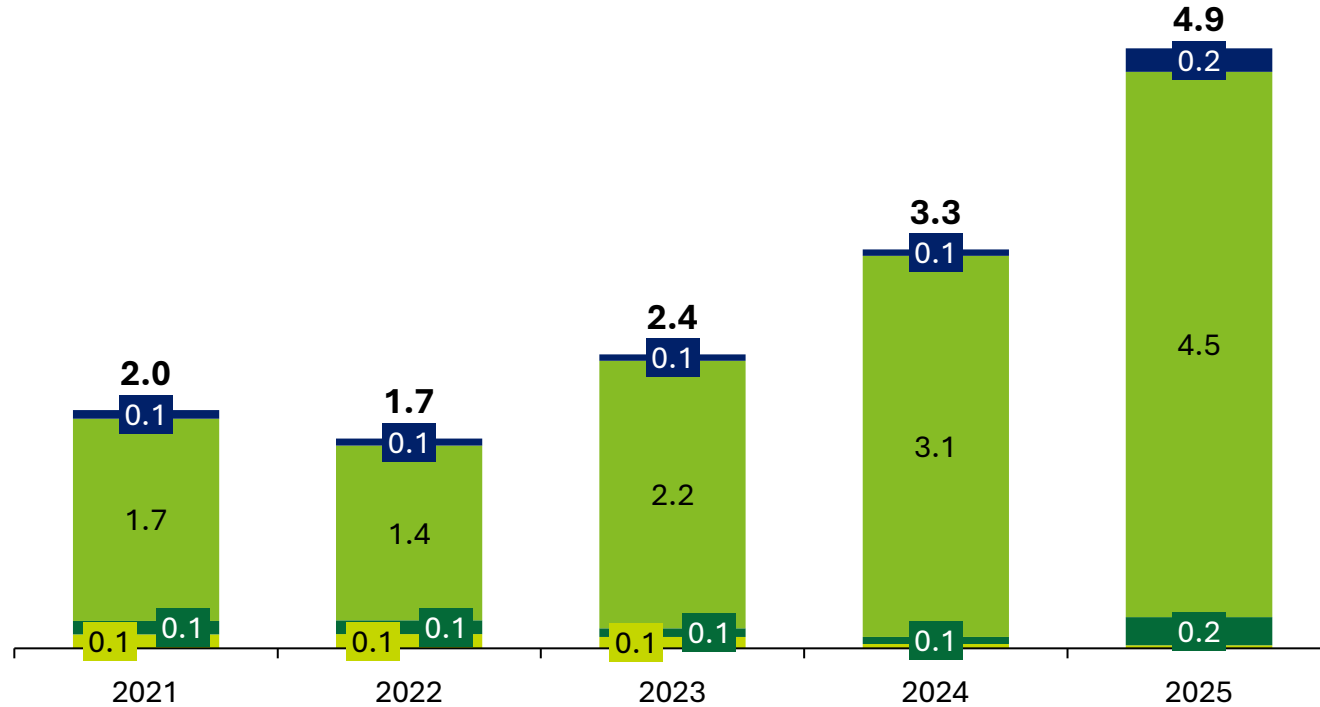


- ICT exports **have expanded by approximately 2.5 times over the past five years**, demonstrating a strong scalability. This performance indicates that the sector's growth **has not been driven solely by domestic demand but also by its ability to establish** a strong presence in **international markets**.
- Following the **limited contraction experienced in 2022**, export performance recovered and recorded consecutive growth rates throughout the 2023–2025 period. This trend suggests that **the sector's export capacity has increased structurally**, supporting its long-term competitiveness.
- **The export volume generated by companies operating in technoparks** stands out as a key growth driver, strengthening the sector's global competitiveness and supporting its expansion in international markets.

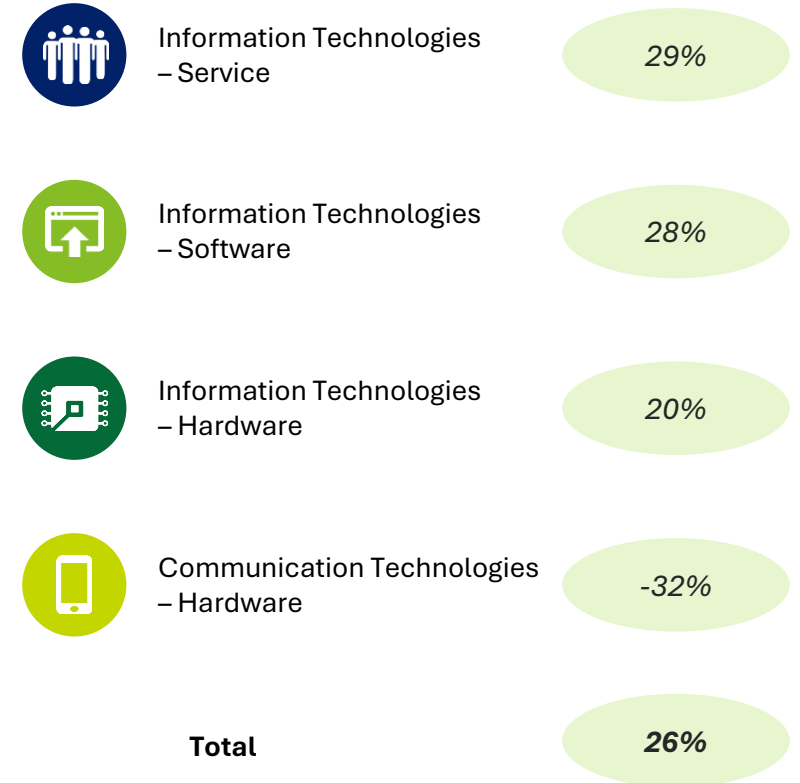
Export of ICT Sector

Development by subcategories - billion USD

ICT Exports
(billion USD)



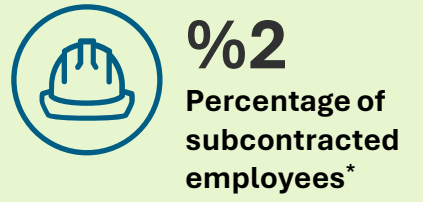
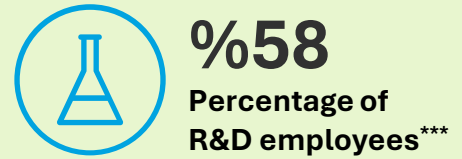
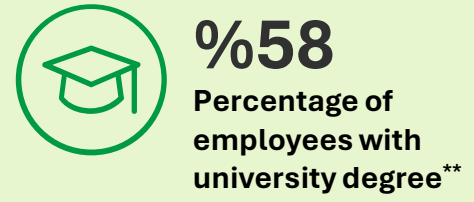
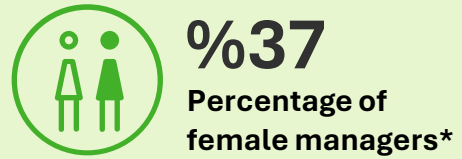
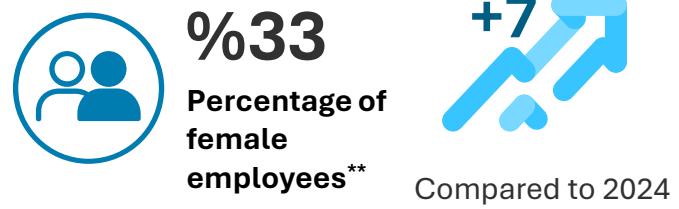
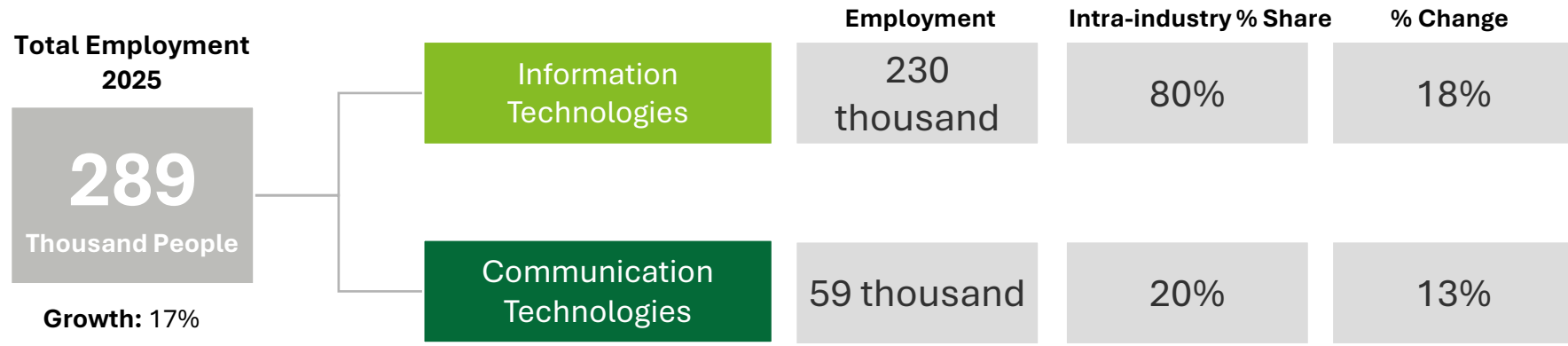
2021-2025 Compound Annual Growth Rate



Note: Totals may differ due to rounding.

Employment (thousand people)

The sector's total employment reached 289 thousand in 2025, reflecting a 17% increase, while the rise in the share of female employees compared to the previous year stands out as a notable development.

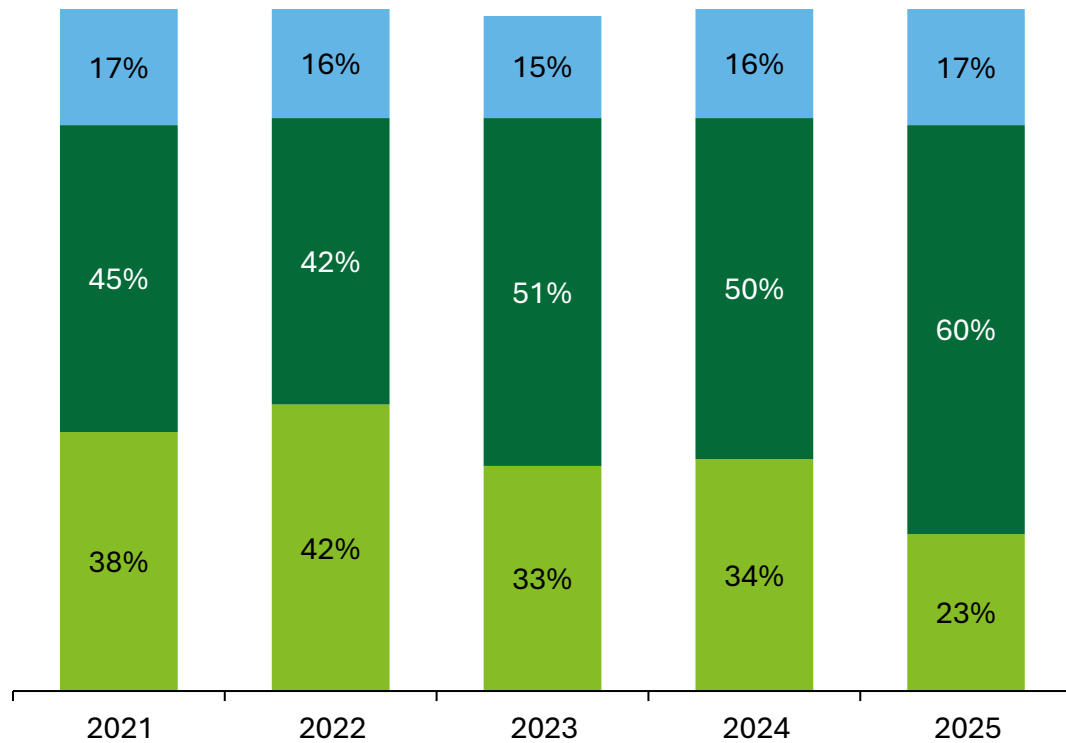


*: Survey Participant Companies
 **: Survey Participant Companies and BTK data
 ***: Survey Participant Company, BTK and Ministry of Industry and Technology data

Change in Sub-Category Shares by Year

In 2025, the Information Technologies market evolved toward a new composition characterized by the increasing prominence of the software segment and the relative decline in the share of hardware.

Information Technologies Market Components



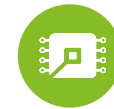
Service

Stable outlook: The IT-Services category maintained its **balanced trajectory in recent years** in 2025, accounting for a **17% share** of the sector.



Software

Growth engine: The share of IT-Software increased to **60% in 2025, reaching its highest level in the last five years**. This trend indicates that, driven by growing demand for artificial intelligence, cloud computing, cybersecurity, and enterprise software solutions, **sectoral value creation is increasingly concentrated around software**.



Hardware

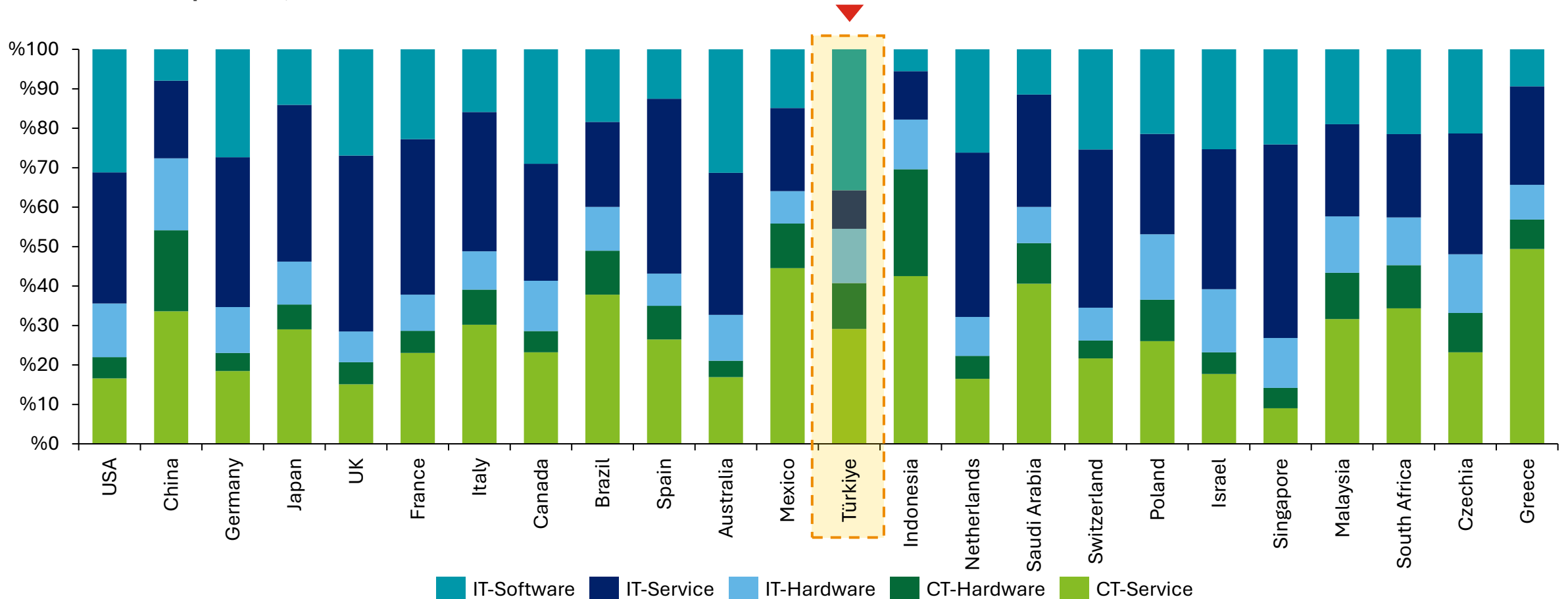
Downward trend: The share of IT-Hardware declined to **23% in 2025, reaching its lowest level in the last five years**. This may indicate a **structural transformation** in the composition of the sector.

Note: Totals may differ due to rounding.

Change in Sub-Category Shares by Country

The software-centric structure of Türkiye's ICT market is shaping the sector's growth and transformation dynamics, distinguishing the country from many of its global peers.

ICT Market Components, 2025

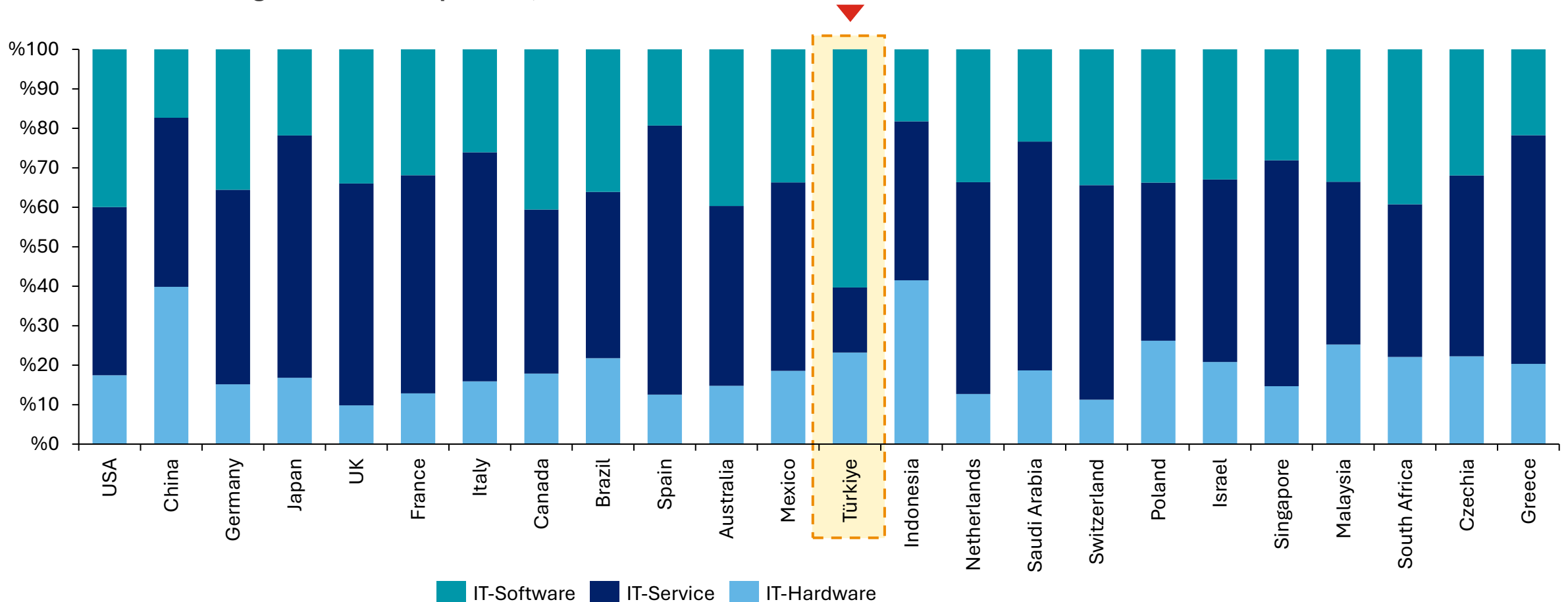


Source: Gartner, Deloitte analysis

Change in Subcategory Shares by Country – IT Market Components

Türkiye’s Information Technology market exhibits a relatively high concentration in the software segment, while the share of IT services remains comparatively lower than in many other countries.

Information Technologies Market Components, 2025

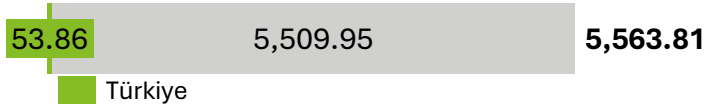


Source: Gartner, Deloitte analysis

A Brief Outlook on ICT Sector

Türkiye in the Global ICT Market

(billion USD)



0.97%

Türkiye's ICT
Market Share in the
Global ICT Market

↑ +0.25

Compared to 2024

ICT Sector in Türkiye's GDP

(billion TL)



3.38%

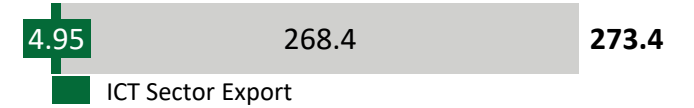
ICT Sector's Share
in Türkiye's GDP

↑ +0.61

Compared to 2024

ICT Sector Exports in Türkiye's Total Exports

(billion USD)



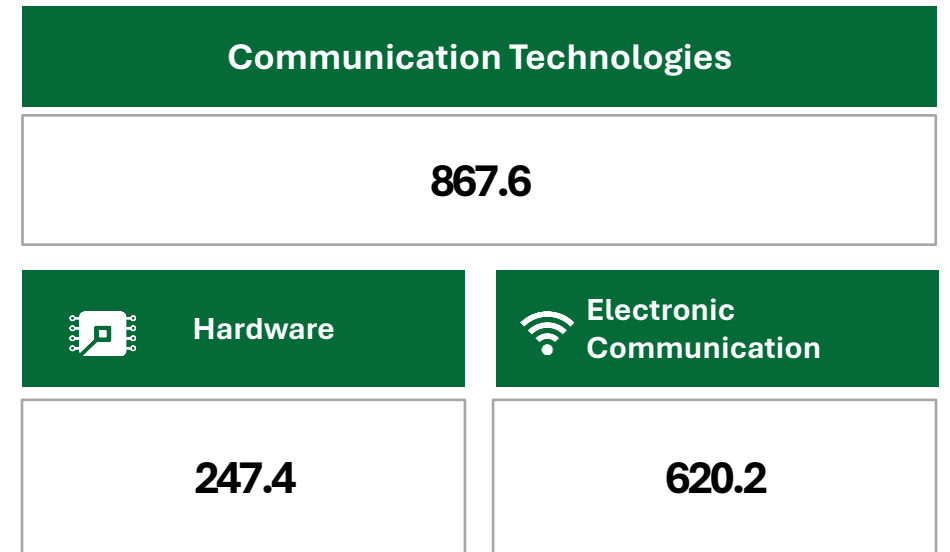
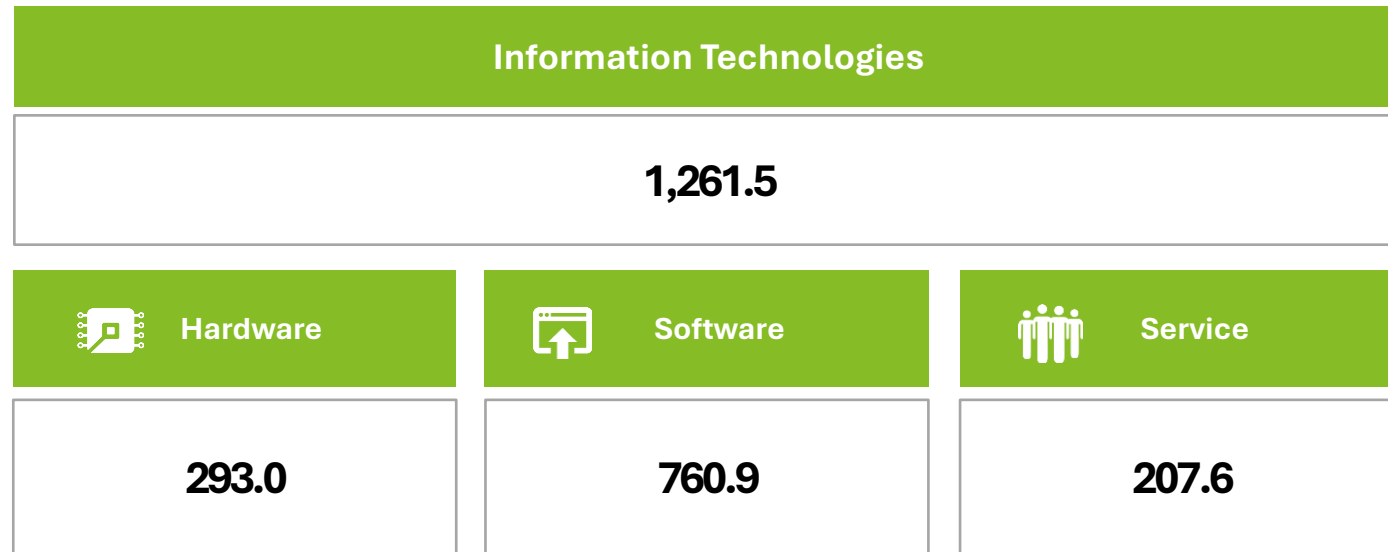
1.81%

ICT Sector's Share
in Türkiye's GDP

↑ +0.55

Compared to 2024

2025 Information and Communication Technologies Market (billion TL)



2025 Information and Communication Technologies Market (billion USD)



Information Technologies

31.9

Hardware

7.4

Software

19.2

Service

5.2

Communication Technologies

21.9

Hardware

6.3

Electronic Communication

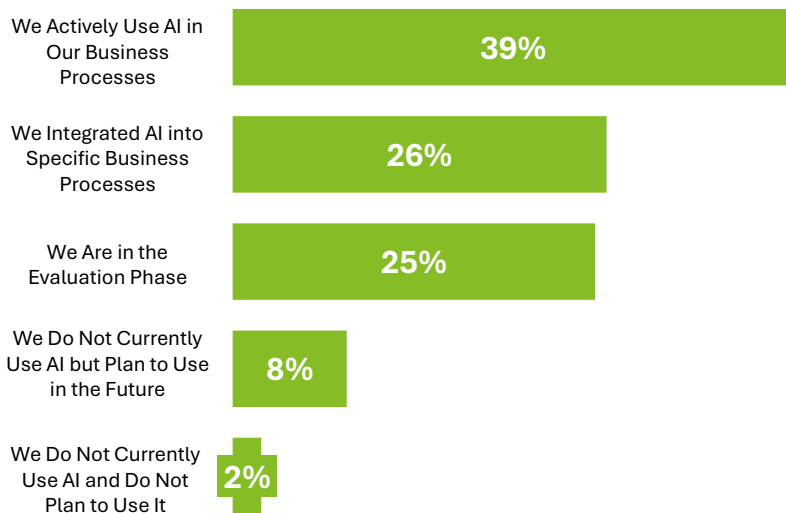
15.7

The AI Wave in Türkiye's ICT Sector: Investment, Value and Transformation

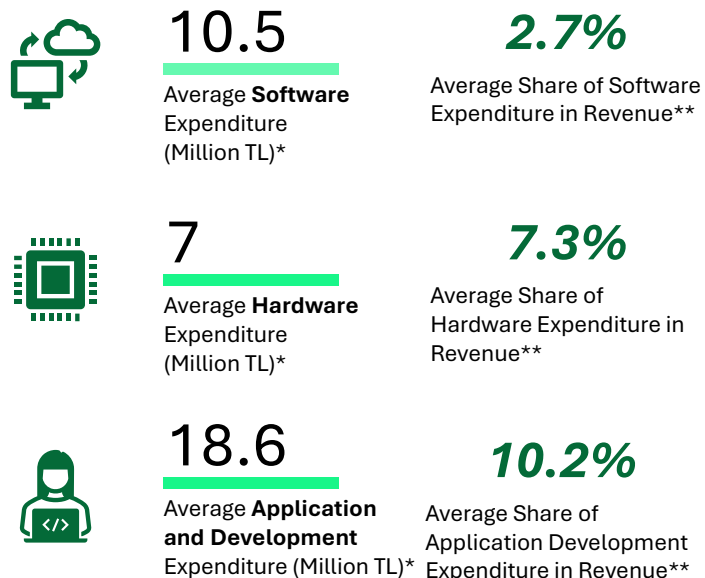
AI Spending in Companies: Current State

More than 90% of companies are either actively using AI in their operations or are evaluating the use of it. At the same time, the financial returns of AI investments remain an area with significant room for further development.

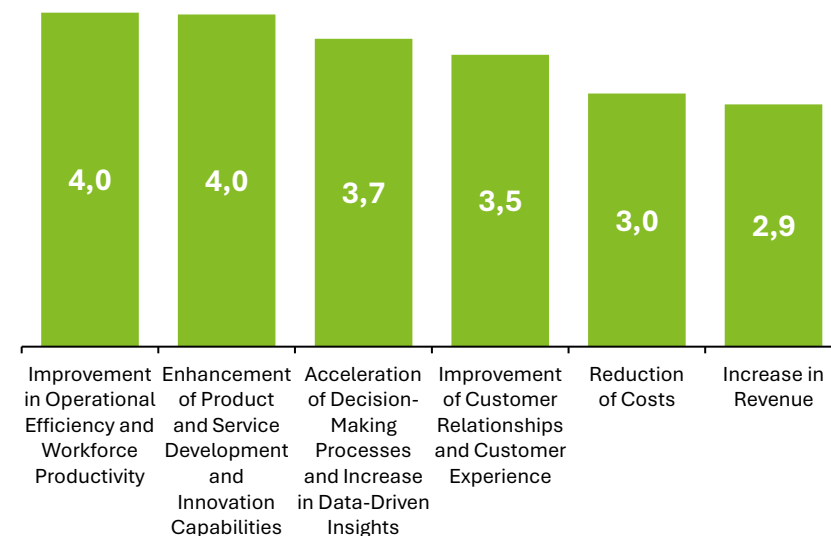
Q: What is the current status of AI adoption and its impact within your company? (Multiple Selection)



Q: What is your company's total AI-related expenditure in 2025? (Open-Ended)



Q: How would you assess the value created by your company's AI investments in 2025 across the areas below? (1-5 Likert Scale)



- 65% of companies either actively use AI in their business processes or have integrated it into specific processes, indicating that the sector **has surpassed the critical maturity threshold for AI adoption.**

- Application and development** stands out as the most prominent AI investment category in company portfolios, accounting for approximately **10.2%** of operating profit on average. This indicates that AI investments are evolving into a **strategic budget item focused on transformation and value creation.**

- AI investments create the greatest value in **operational efficiency and product innovation**, their impact on financial indicators such as **revenue and cost impact** remains relatively limited. This suggests that the contribution of these **investments to overall P/L performance is still evolving.**

*: All companies that responded to the relevant question

** : Companies that reported expenditures in the relevant category

AI Spending in Companies: Expectations

Companies are planning to scale their AI investments in the coming period and consider these investments a strategic transformation tool to primarily enhance efficiency, innovation, and decision-making capabilities.

Q: What is your estimated AI infrastructure investment budget for the 2026–2027 period? (Open-ended)



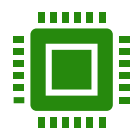
28.8

million TL, estimated **software** budget* (average)



25.6

million TL, estimated **application and development** budget* (average)

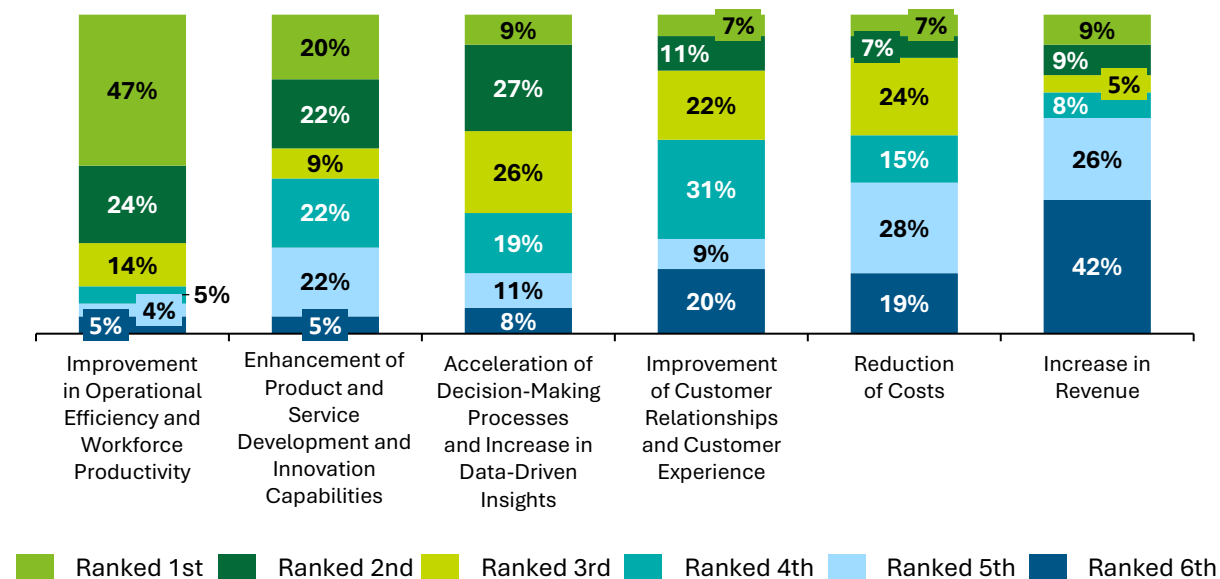


6.9

million TL, estimated **hardware** budget* (average)

- Compared to current AI spending levels, companies are expected to increase their investments particularly in **software** and **application & development** in the coming period. This trend indicates that AI is evolving from experimental applications into an investment area that is **integrated into business processes** and **scaled across the organization**.

Q: Please rank the following areas based on the expected value contribution of your company's AI infrastructure investments planned for the 2026–2027 period. (Ranking)



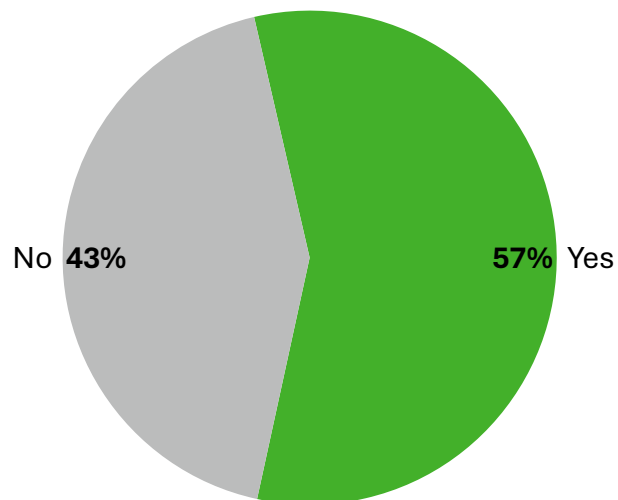
- The value creation areas expected from AI investments are largely aligned with the current experiences of companies. **Operational efficiency and workforce productivity**, along with **product and service innovation**, stand out as the areas where the greatest benefits have been realized to date and where the **highest value contribution is expected in the coming period**.

*: All companies that responded to the relevant question

Developed AI Solutions (1/2)

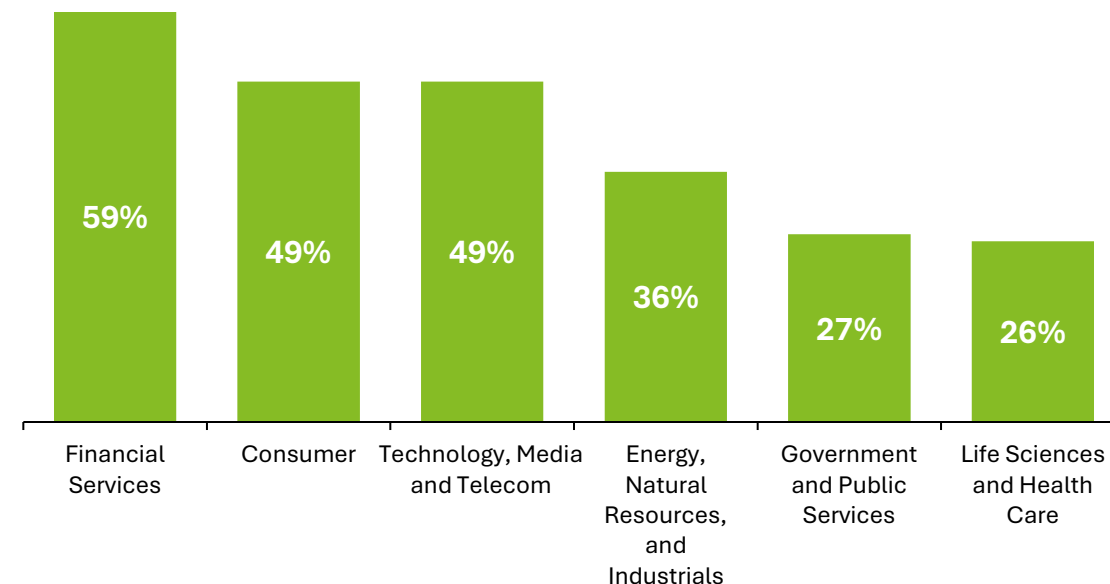
More than half of participating companies indicated that they develop AI solutions for their customers. Their solution portfolios are primarily concentrated in the financial services, consumer, and technology focused sectors.

Q: Does your company develop AI/GenAI solutions for its customers? (Single Selection)



- **57% of participating companies** stated that they are developing AI solutions for their customers. This indicates that AI is evolving beyond being **only a technology adopted for internal use** and is becoming an important component of companies' **commercial product and service portfolios**.

Q: For which of the following industries does your company develop AI/GenAI solutions? (Multiple Selection)

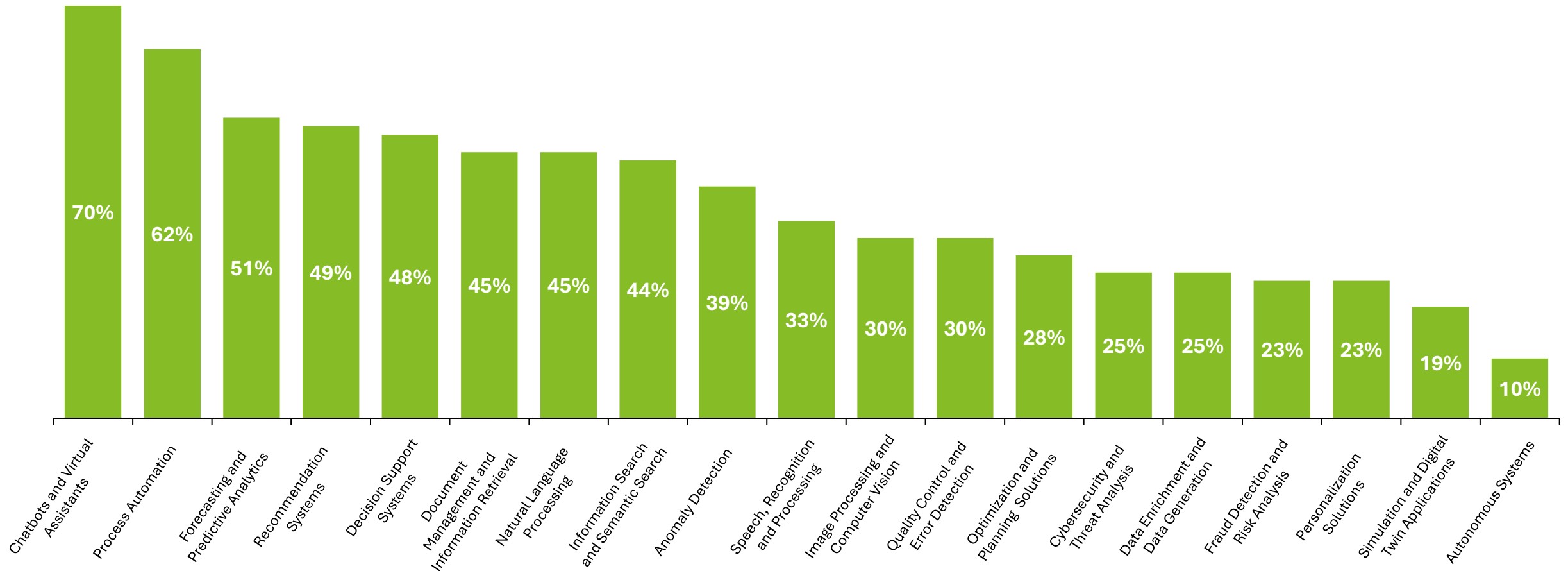


- **The financial services sector**, leading by a clear margin at **59%**, confirms that industries with high data intensity and regulatory pressure have a stronger demand for AI solutions. Meanwhile, **the consumer and TMT sectors**, ranking second at **49%**, demonstrate that **customer experience and personalization-focused** use cases also generate a strong demand base.

Developed AI Solutions (2/2)

Companies are mainly focusing on the applications that drive operational efficiency, process automation and faster access to information. More advanced use cases such as digital twins and autonomous systems remain relatively limited.

Q: Which of the following areas are covered by AI/GenAI solutions developed by your company? (Multiple Selection)

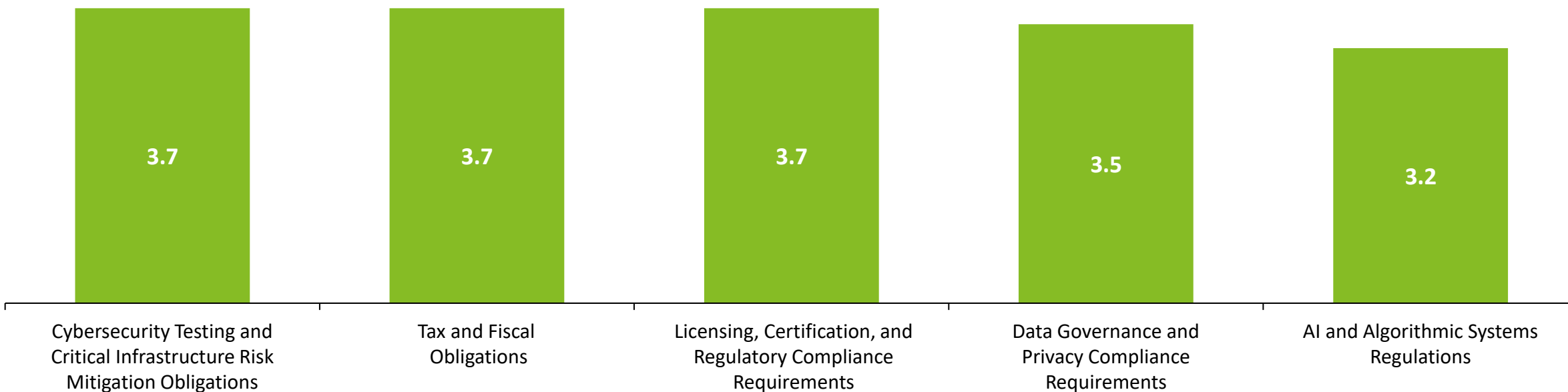


Regulatory Impacts and Sustainability Outlook

Impact of Regulations on Operational Costs

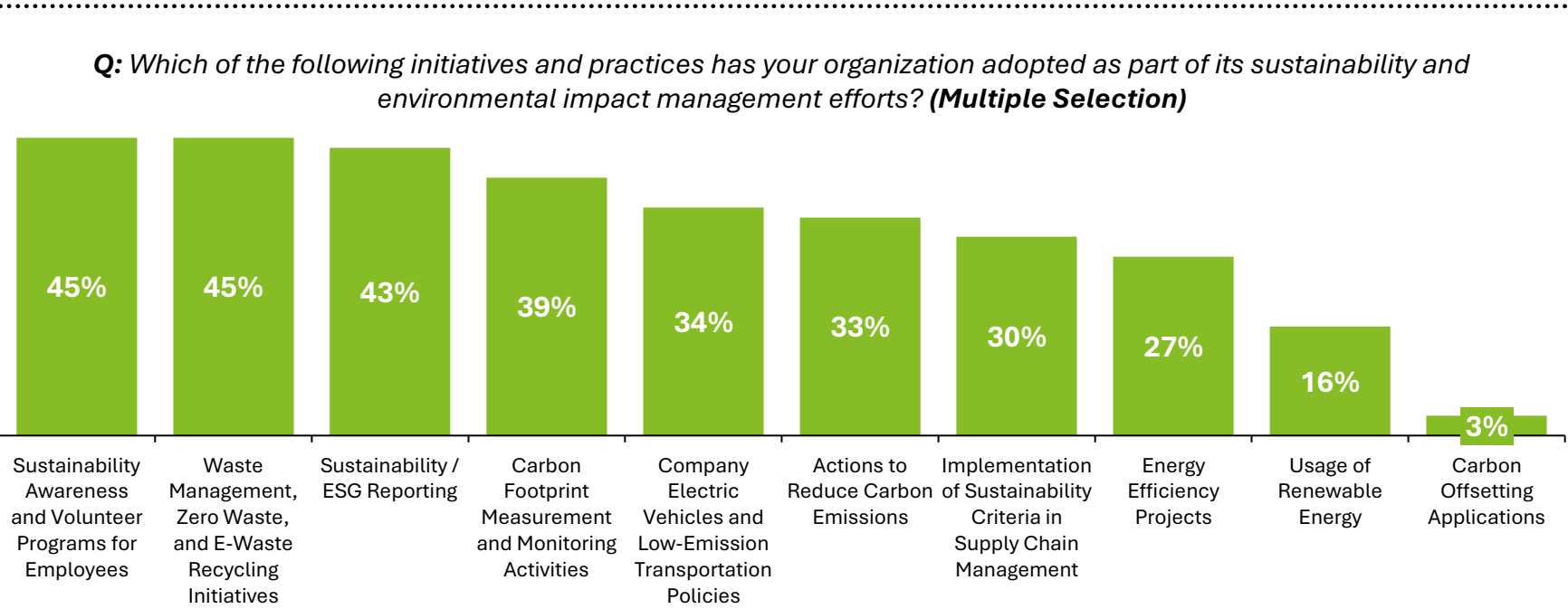
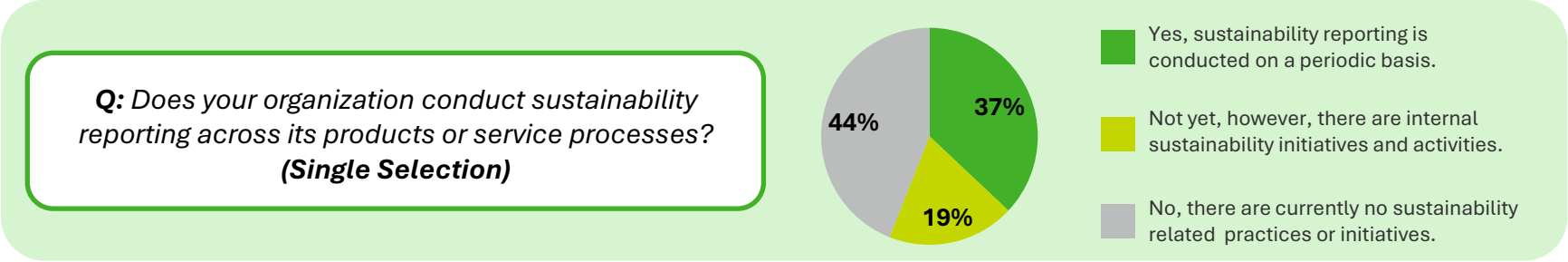
Cybersecurity requirements, tax obligations, and licensing requirements stand out as the key regulatory areas driving operational cost pressures. In contrast, AI related regulations currently exhibit a relatively limited impact.

Q: To what extent does each of the following regulatory areas impact your organization's operational costs?
(1: Significantly decreases operational costs 3: No significant impact 5: Significantly increases operational costs)
(1-5 Likert Scale)



Varying Levels of Sustainability Maturity Across Organizations

Only 37% of companies conduct sustainability reporting on a periodic basis. Participation remains limited in areas that require more systematic transformation such as carbon offsetting, renewable energy adoption and supply chain integration.





THANK YOU

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