



## Information and Communication Technologies Sector

2024 Market Data

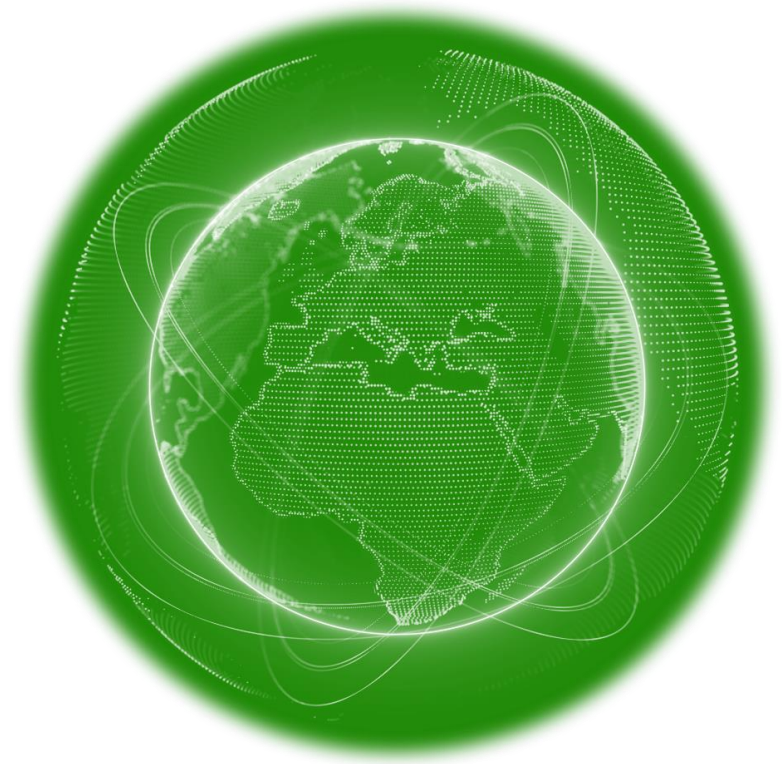
May 2025

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# Forewords





**Mehmet Ali Tombalak**

TÜBİSAD

Yönetim Kurulu Başkanı

The information and communication technologies (ICT) sector has become a strategic lever enhancing Turkey's global competitive strength. In recent years, the rise in software exports, the ambition of technology companies to expand abroad, and groundbreaking developments such as generative artificial intelligence are among the most evident signs of this transformation. Encouraging domestic production and competencies in strategic areas not only reduces foreign dependency but also strengthens Turkey's positioning as a reliable technology partner in international markets. For Turkish technology companies to take on a more active role on a global scale, it is essential to support them not only through product and service exports but also through business model exports, strategic partnerships, and foreign investments. This year, with the 14th edition of our Information and Communication Technologies Industry Report, we present a roadmap for this transformation. The report goes beyond figures; it highlights structural trends in the industry, emerging fields, and insights for decision-makers, laying out the building blocks of a vision for a technologically empowered Turkey. The primary goal of this report, which serves as a strategic guide for industry stakeholders, is clear: to position Turkey not just as a consumer of technology, but as a center that designs, develops, and delivers technology to the world. I sincerely thank all stakeholders who have contributed to this transformation journey. I hope this study will shed light on new opportunities for decision-makers, investors, and entrepreneurs in our sector. I would also like to extend my gratitude to the Ministry of Industry and Technology of the Republic of Türkiye, the Information and Communication Technologies Authority, Context, TÜBİSAD members, and all our supporters for their valuable contributions.

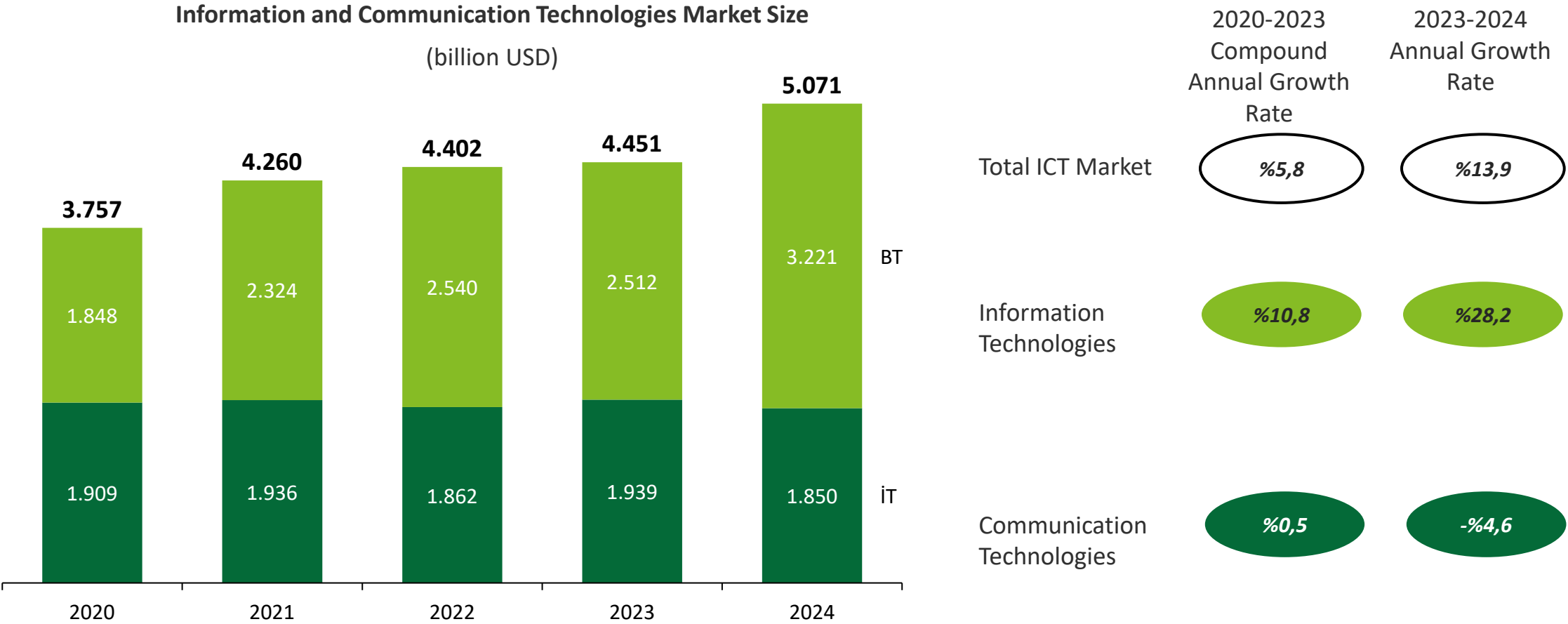
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# Global Industry Size



# Global ICT Market Size in 2024

While the global ICT market size is expected to grow by 13.9% in 2024, reaching \$5 trillion, the information technologies market has triggered global market growth with a growth of 28%. The communication technologies market size has seen a contraction of 4.6%.



Note: Totals may differ due to rounding.  
Source: Gartner, Deloitte analysis  
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# Future Prospects and Global ICT Market Growth Forecast

The global ICT market size is expected to reach \$6.9 trillion in 2028 with an annual growth of 9%, after reaching \$5.4 trillion in 2025.

## Driving Forces



Investments in Artificial Intelligence (AI) are causing companies to accelerate their technology investments to drive revenue growth. Demand for productive AI-enabled devices (e.g. premium smartphones, AI-enabled servers) is increasing.



Data center investments and the need for AI infrastructure are driving demand, particularly for accelerated servers. This is driving growth in both infrastructure software and data centers.



Expectations of inflation being contained and interest rate cuts are creating expectations of a recovery in service spending by providing access to cheaper financing by 2025.



The tendency for holding in corporate budgets and decision delays will keep spending, especially in services and consulting, weak in 2024.



The limited revenue impact of AI investments in the short term is driving a more cautious increase rather than explosive growth in the software and services segments.



Global geopolitical uncertainties and exchange rate volatility make predictability in investments difficult

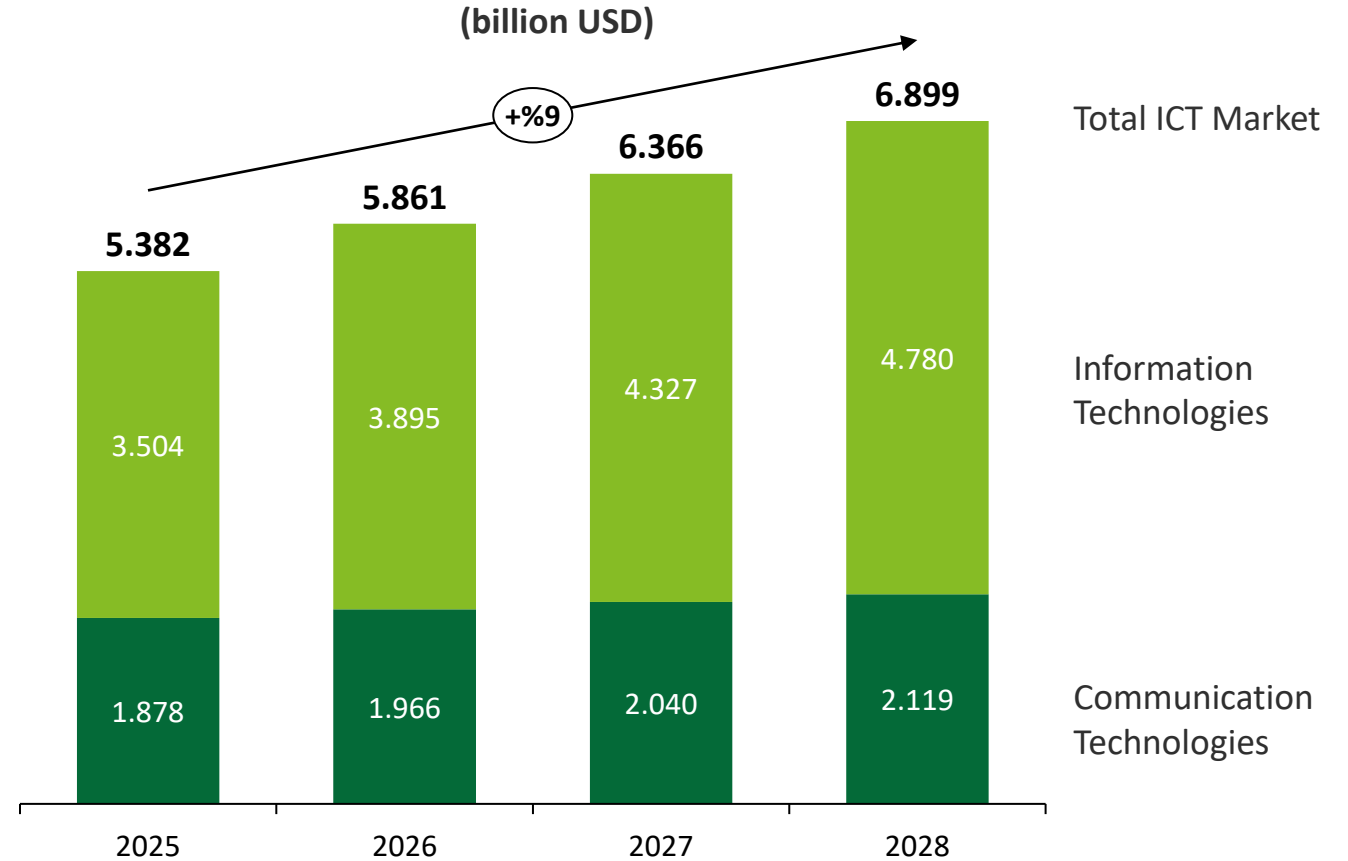
## Kısıtlamalar

Note: Totals may differ due to rounding.

Source: Gartner, Deloitte analysis

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## Global Information and Communication Technologies Market Size



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## Stakeholders of the Study



Project Consultant

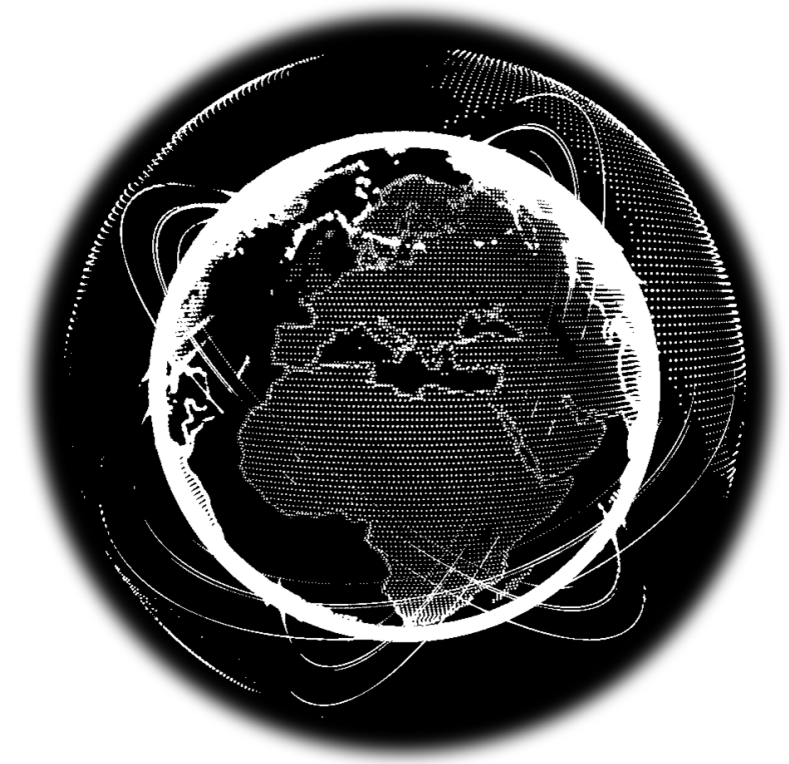
**Deloitte.**

Project Data Partners



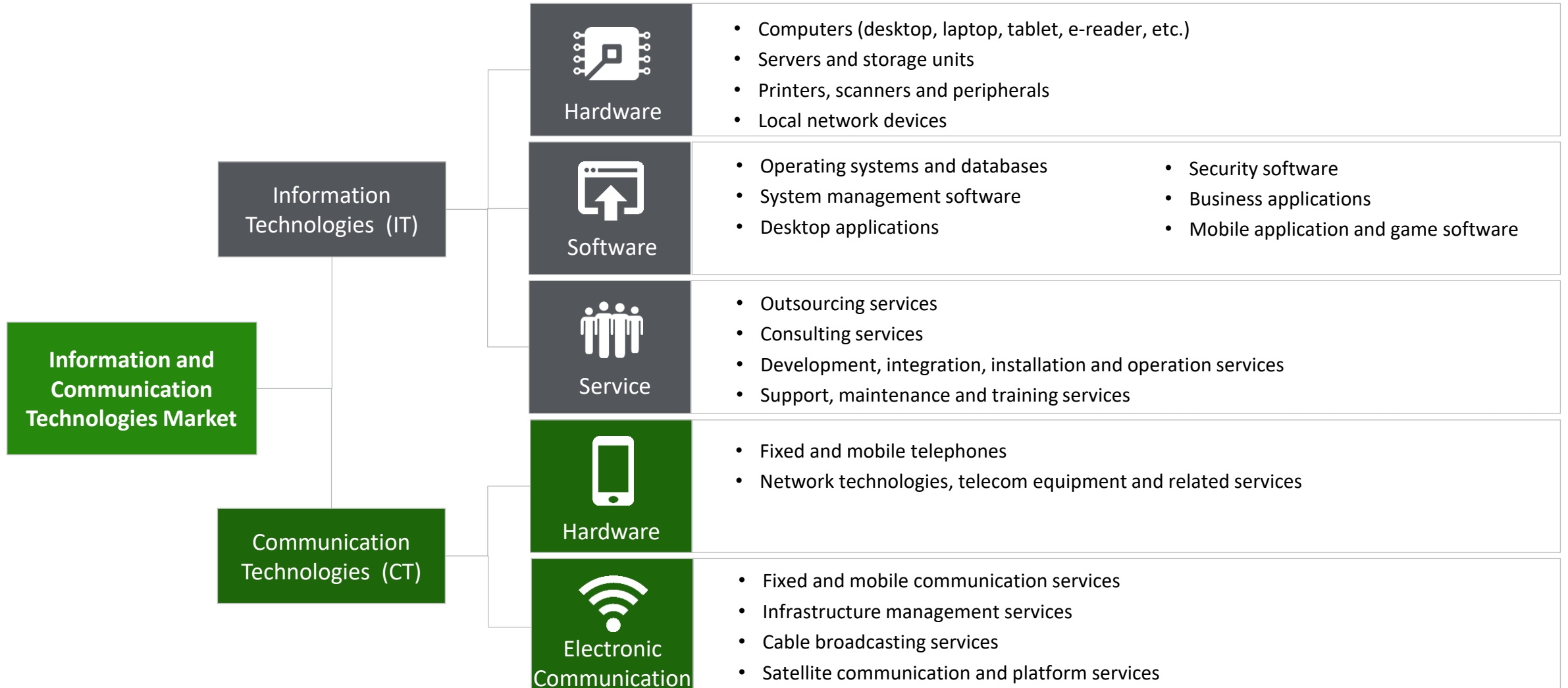
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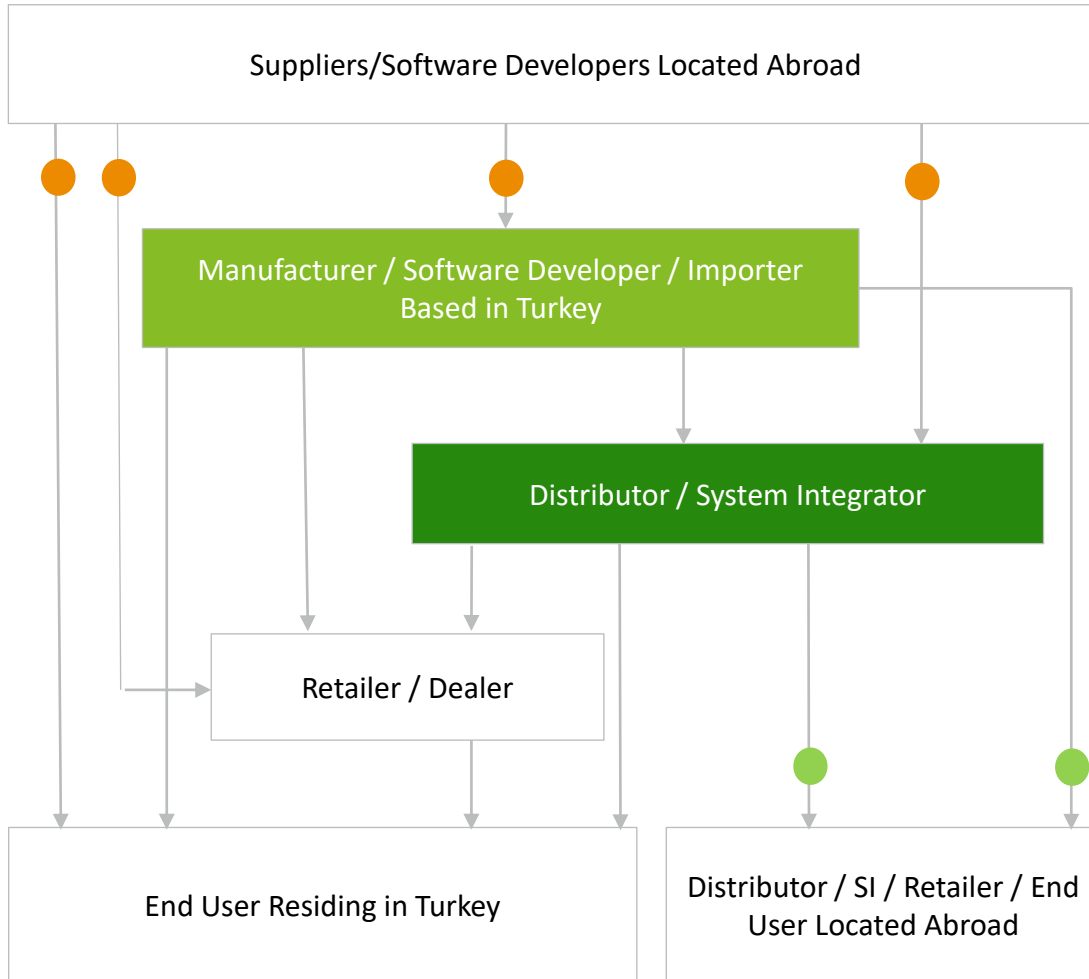
## Scope of the Study



## Scope of the Study

The Market Data study, which TÜBİSAD has been conducting since 2012, has been carried out in line with a standard scope and methodology together with Deloitte for the last 14 years.





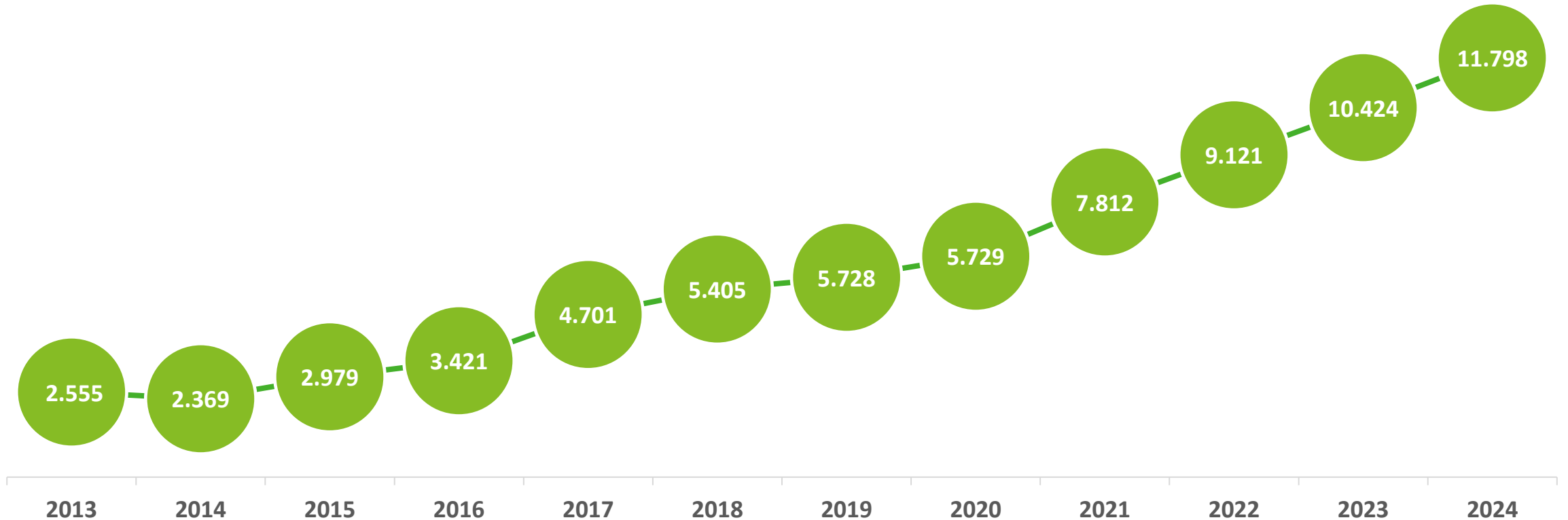
The size of the sector is calculated with a 'bottom-up' measurement method and controls are made. In addition to the data provided by our sector companies through the survey study, the data of institutions such as BTK, Context, SASAD, and the Ministry of Industry and Technology are also used.

- While collecting the data, the size of the sector is separated in a way that prevents duplicate calculation.
- Company sizes are 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 11,798 in 2024.



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# **Information and Communication Technologies Sector in Turkey**

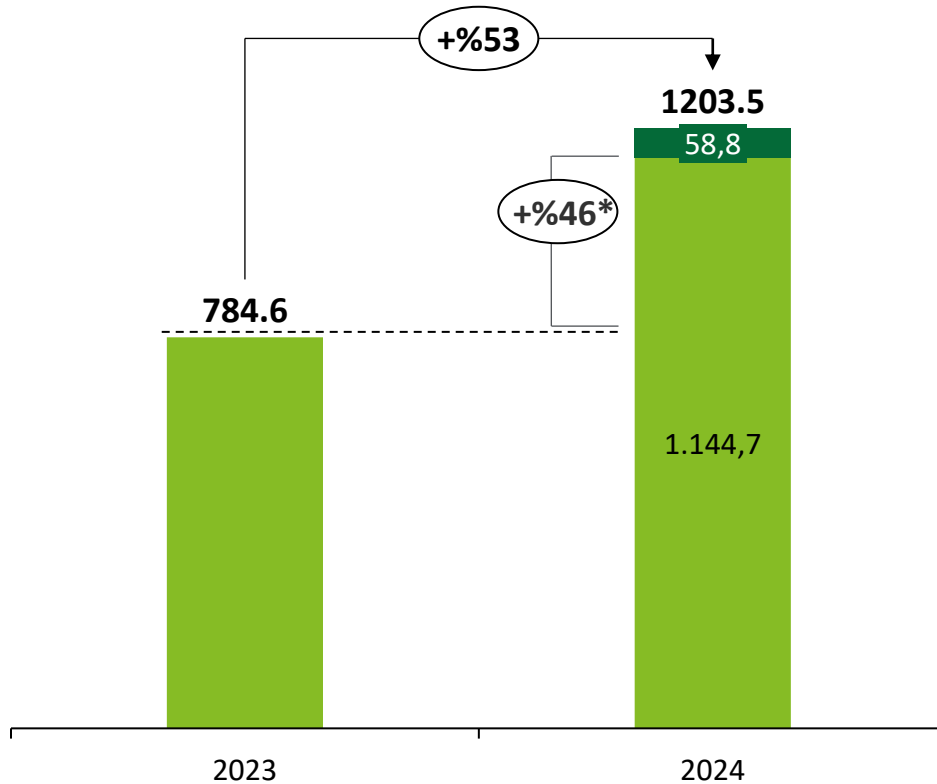


## Total Sector Size (billion TL)

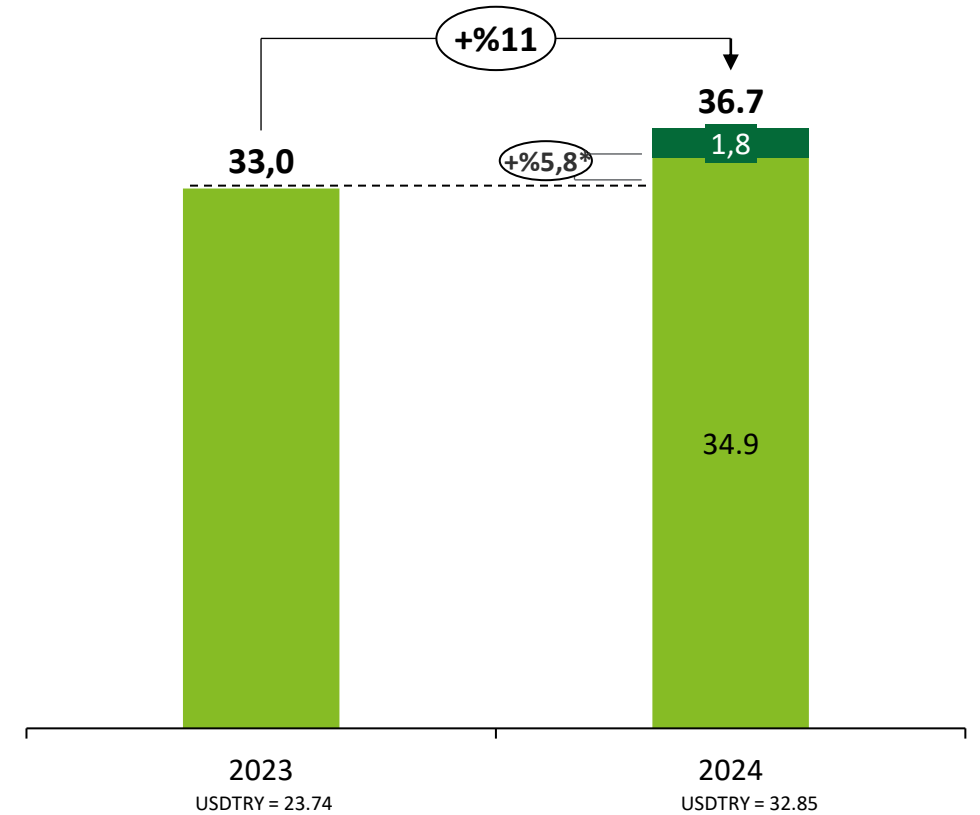
In 2024, the market size reached 1 trillion 203.5 billion TL (36.7 billion USD).


### Information and Communication Technologies Market Size


(billion TL)



(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.

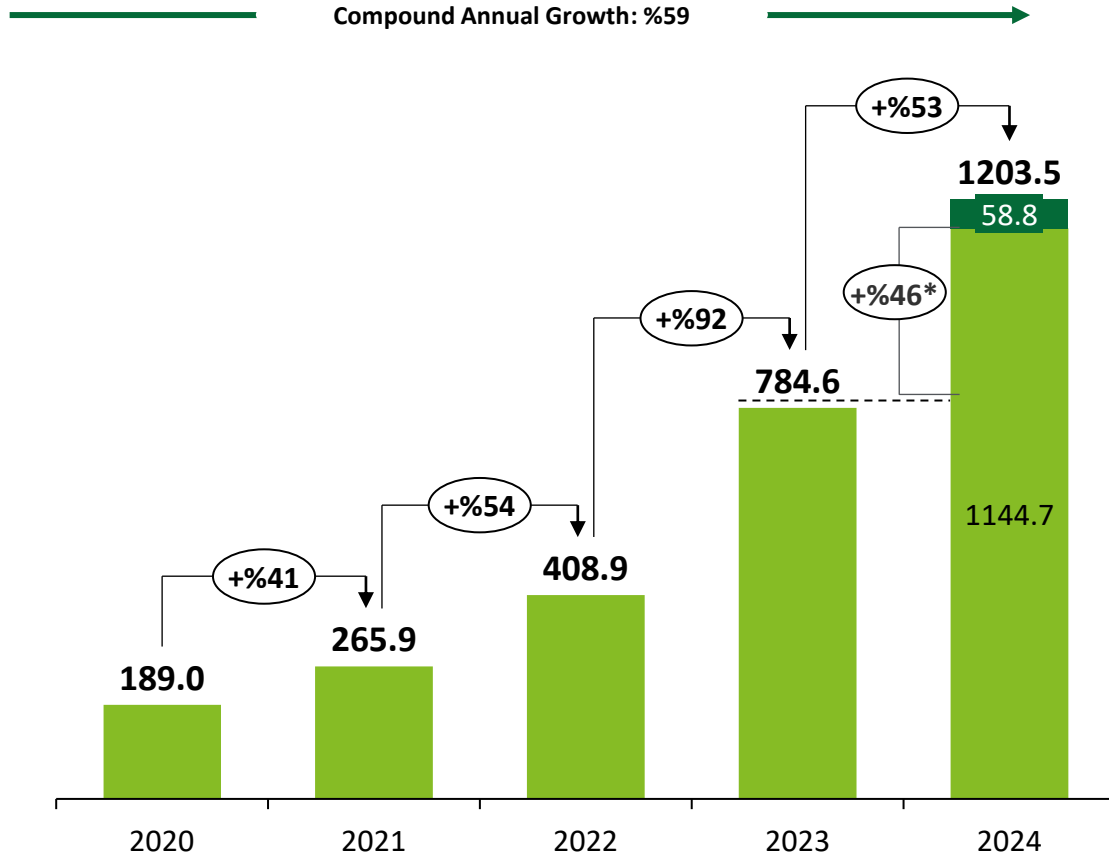
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# Total Sector Size (billion TL and USD)

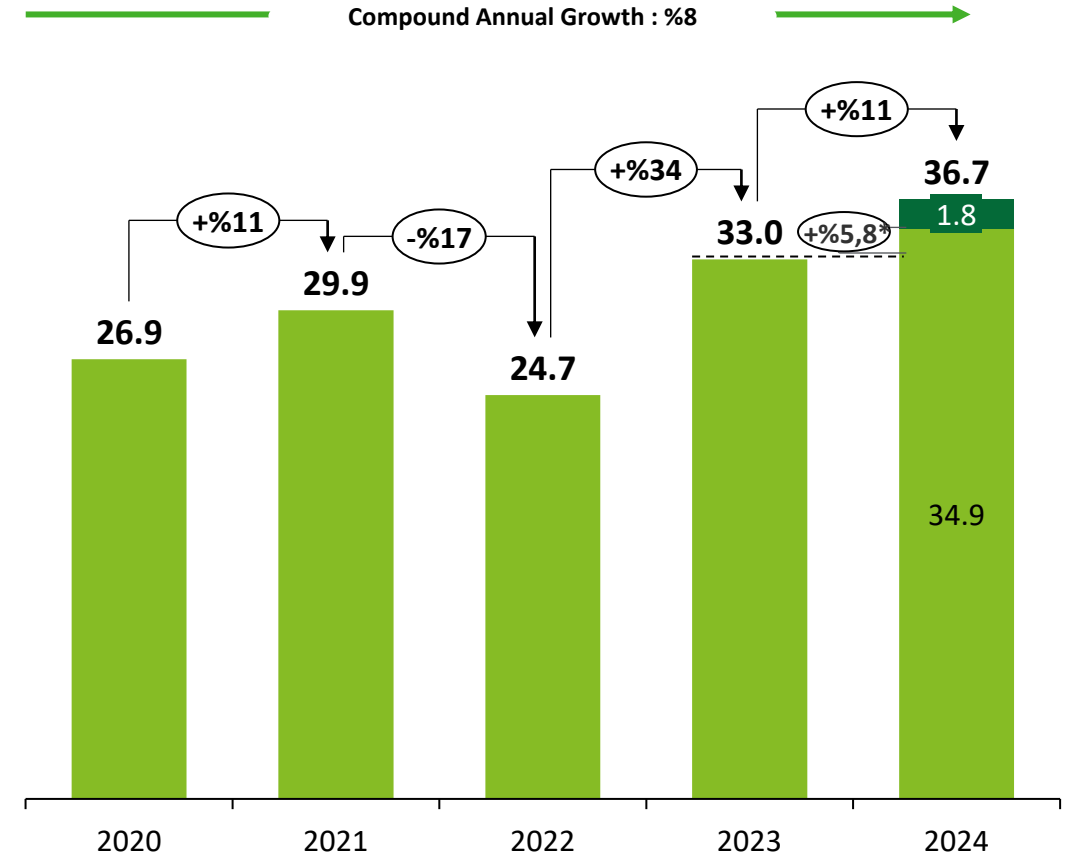
Between 2020 and 2024, the average annual growth of the sector in TL terms was around 59%.

## Information and Communication Technologies Market Size Development

(billion TL)



(billion USD)



■ The size of the newly added companies to the measurement

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\*Annual changes refer to comparable growth rates.

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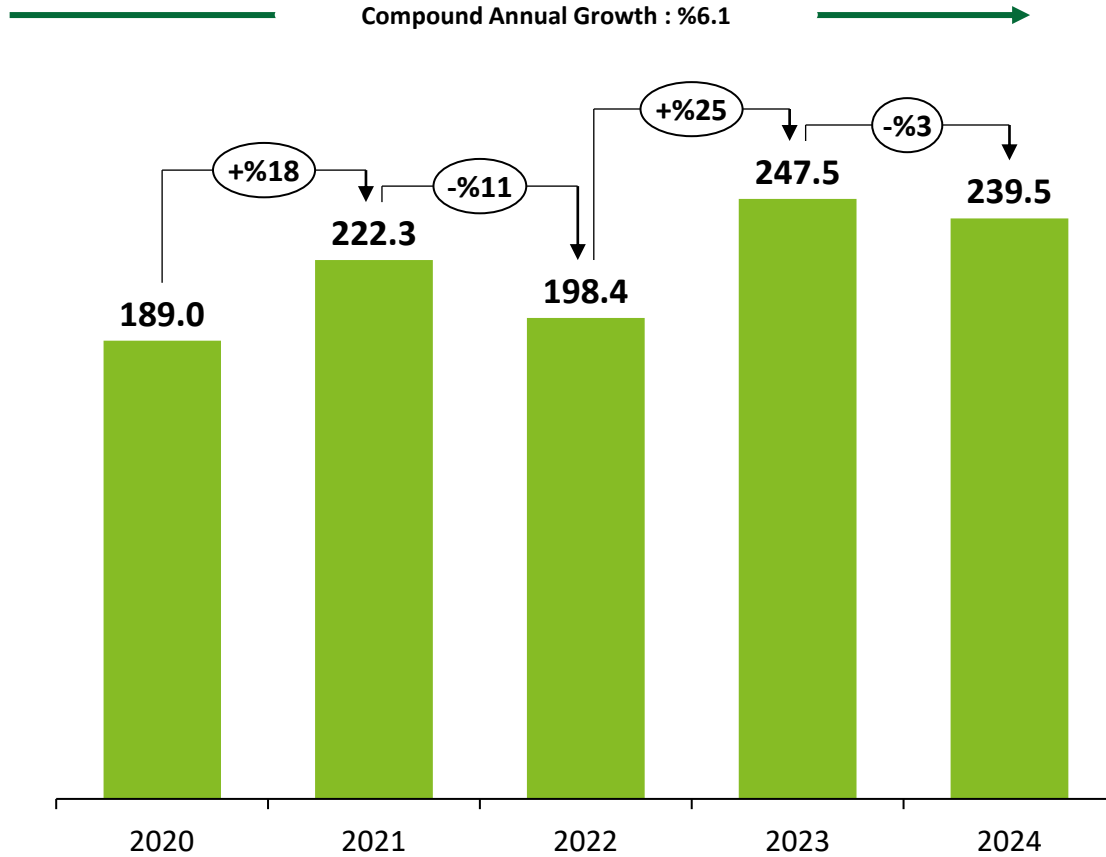
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## Total Sector Size (billion TL and USD)- Inflation Adjusted Values

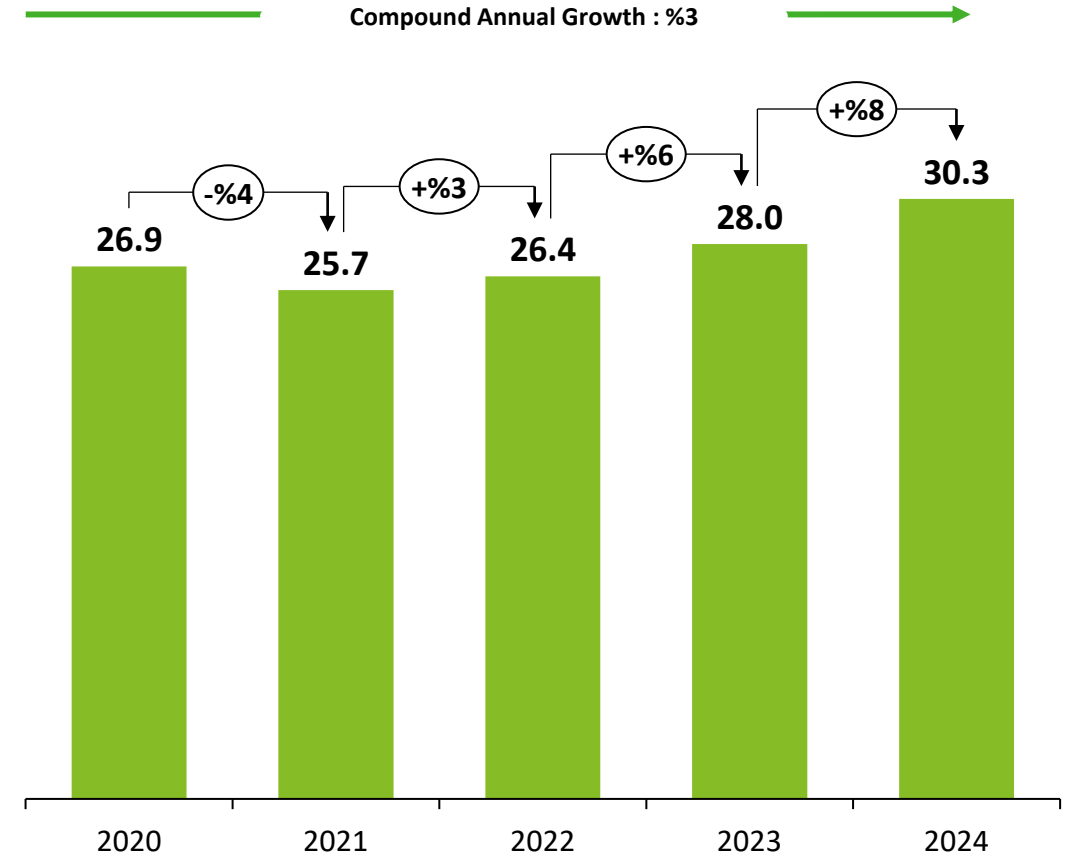
The ICT market has been stable in TL terms and has shown a limited increase in dollar terms in the last four years, adjusted for inflation.

### Information and Communication Technologies Market Size Development

(billion TL, real value)



(billion USD, real value)



\* In the calculation of real value, 2020 is accepted as a base year

Note: Totals may differ due to rounding

Source: TÜİK, IMF

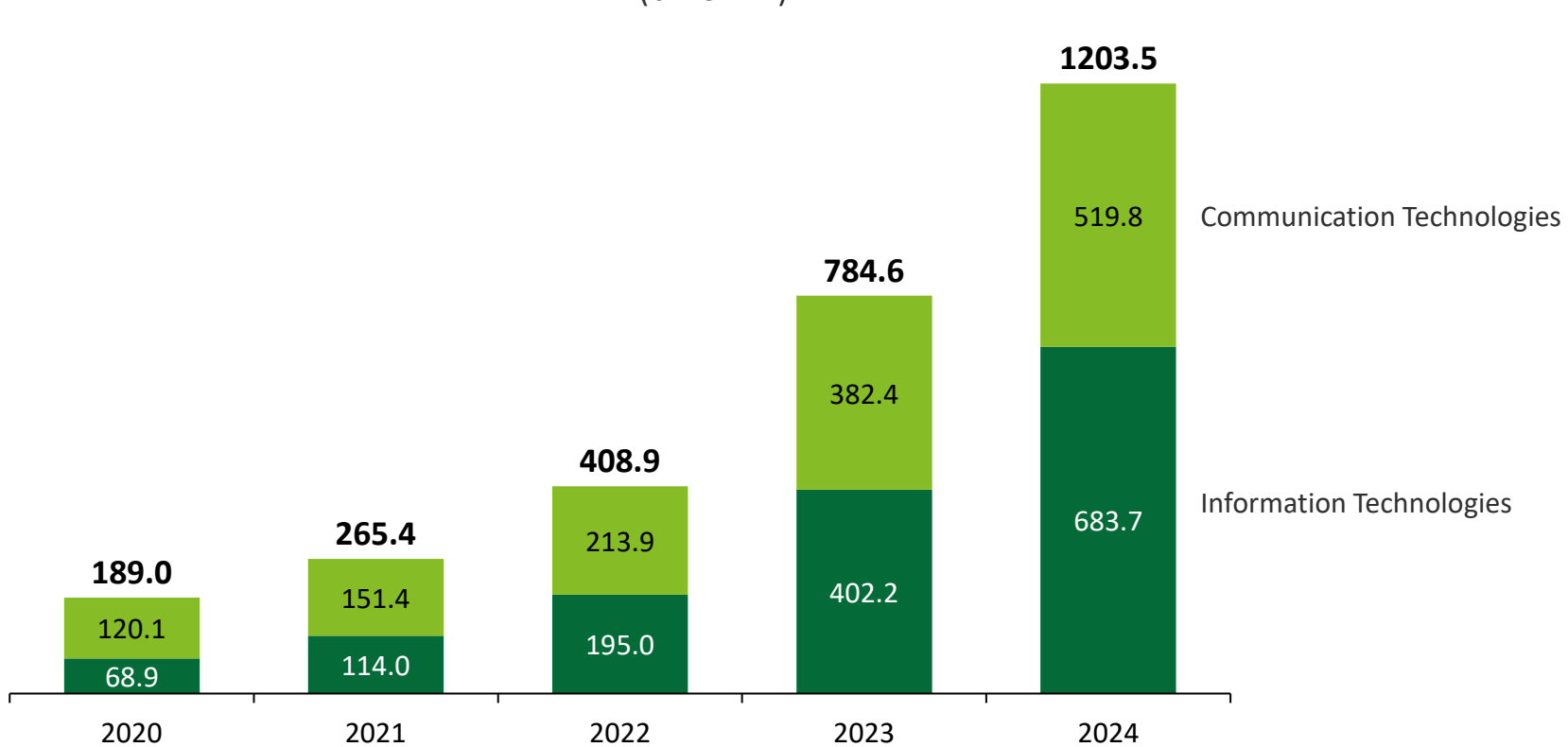
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# Information and Communication Technologies Market Breakdown – billion TL

Information Technologies grew faster than Communication Technologies between 2020 and 2024, reaching 683.7 billion TL in 2024, leaving Communication Technologies (519.8 billion TL) behind in terms of market size.

## Information and Communication Technologies Market Size

(billion TL)



2020-24  
Annual Compounding  
Comparable Growth

%44

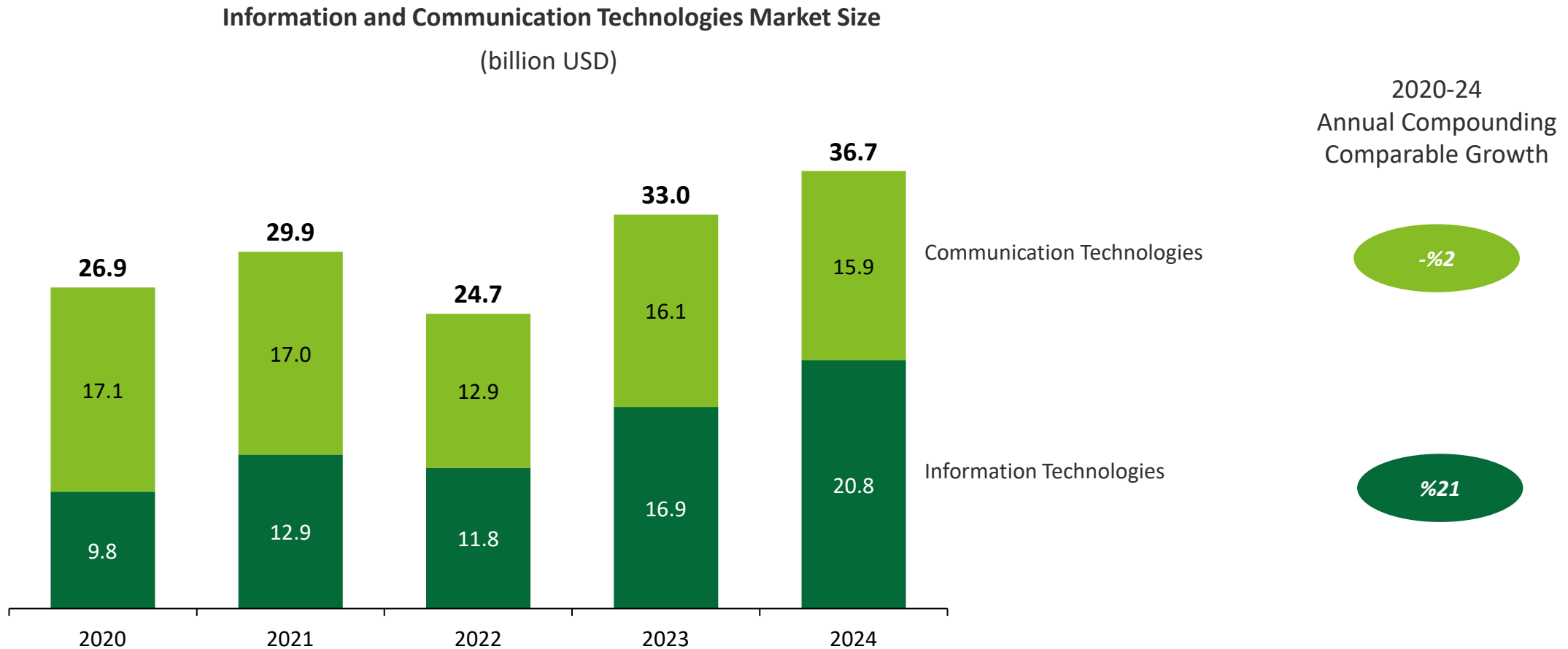
%77

Note: Totals may differ due to rounding

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# Information and Communication Technologies Market Breakdown – billion USD

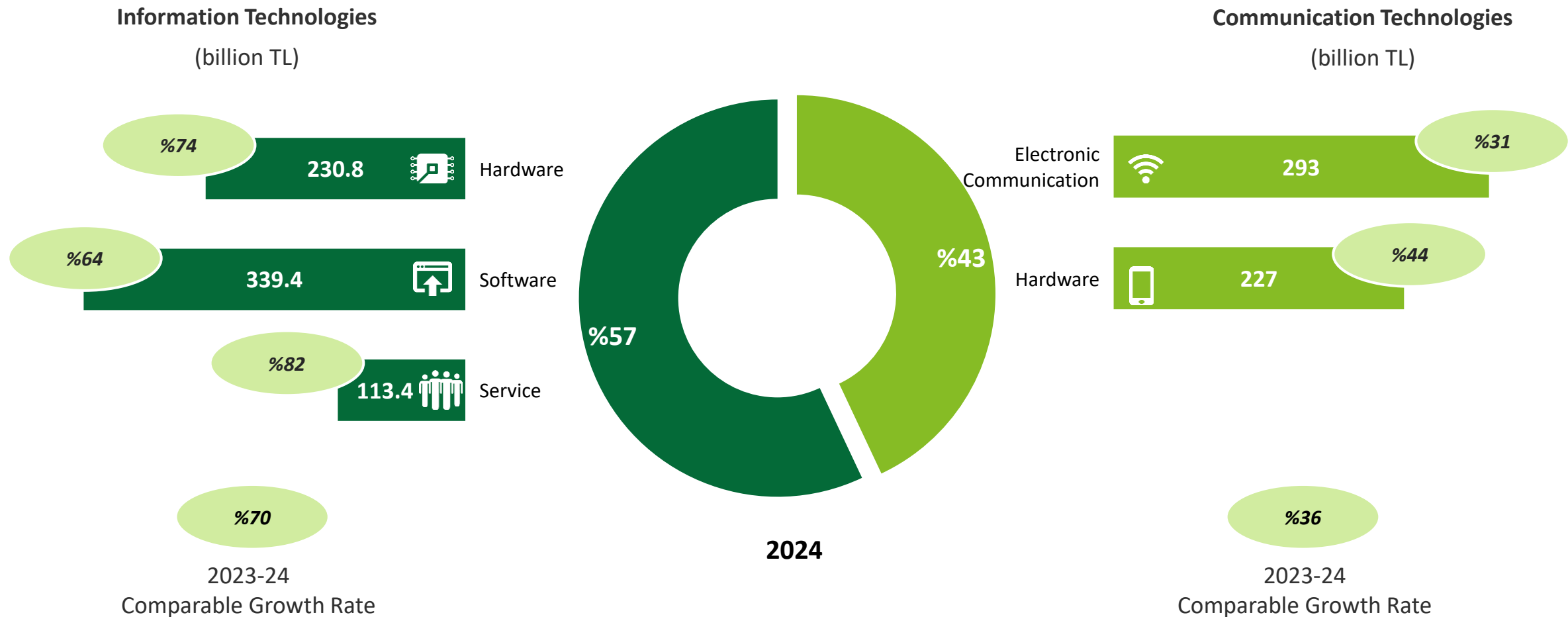
Based on real figures, Communication Technologies exhibited stable performance, whereas Information Technologies recorded a growth of 21%.



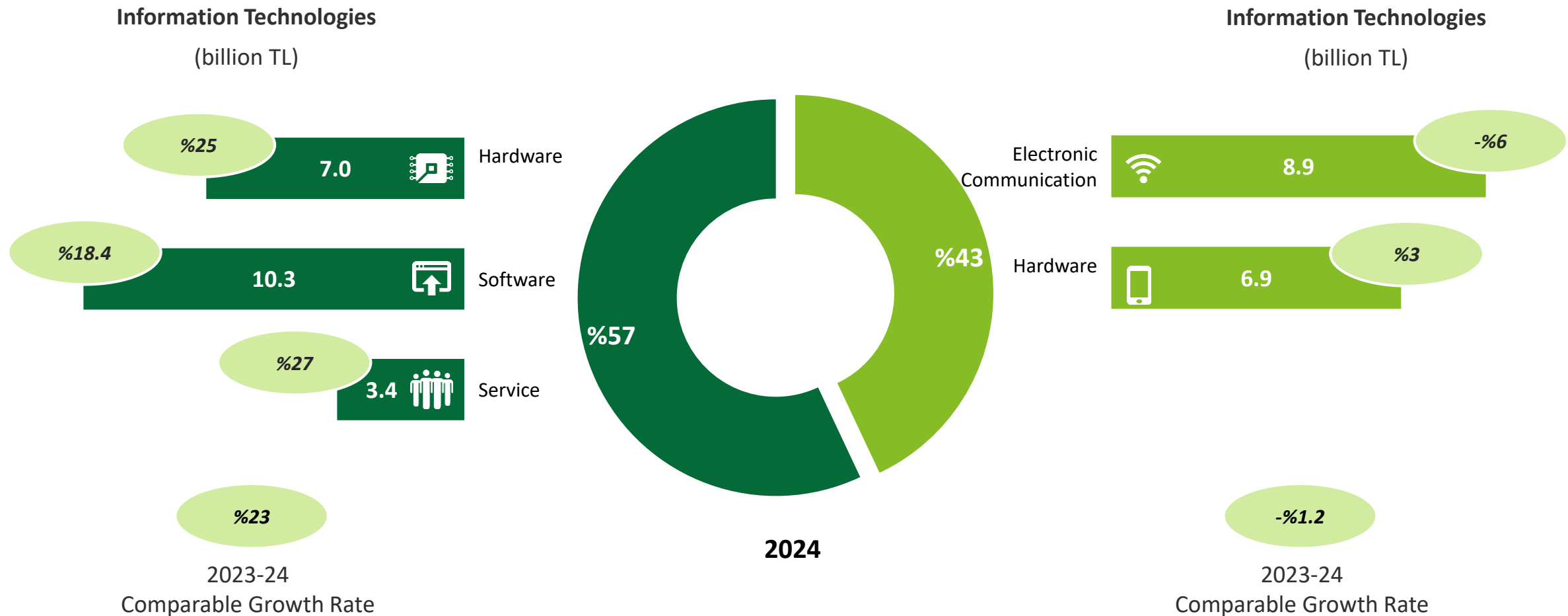
Note: Totals may differ due to rounding

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# Information and Communication Technologies Sector Subcategories



# Information and Communication Technologies Sector Subcategories



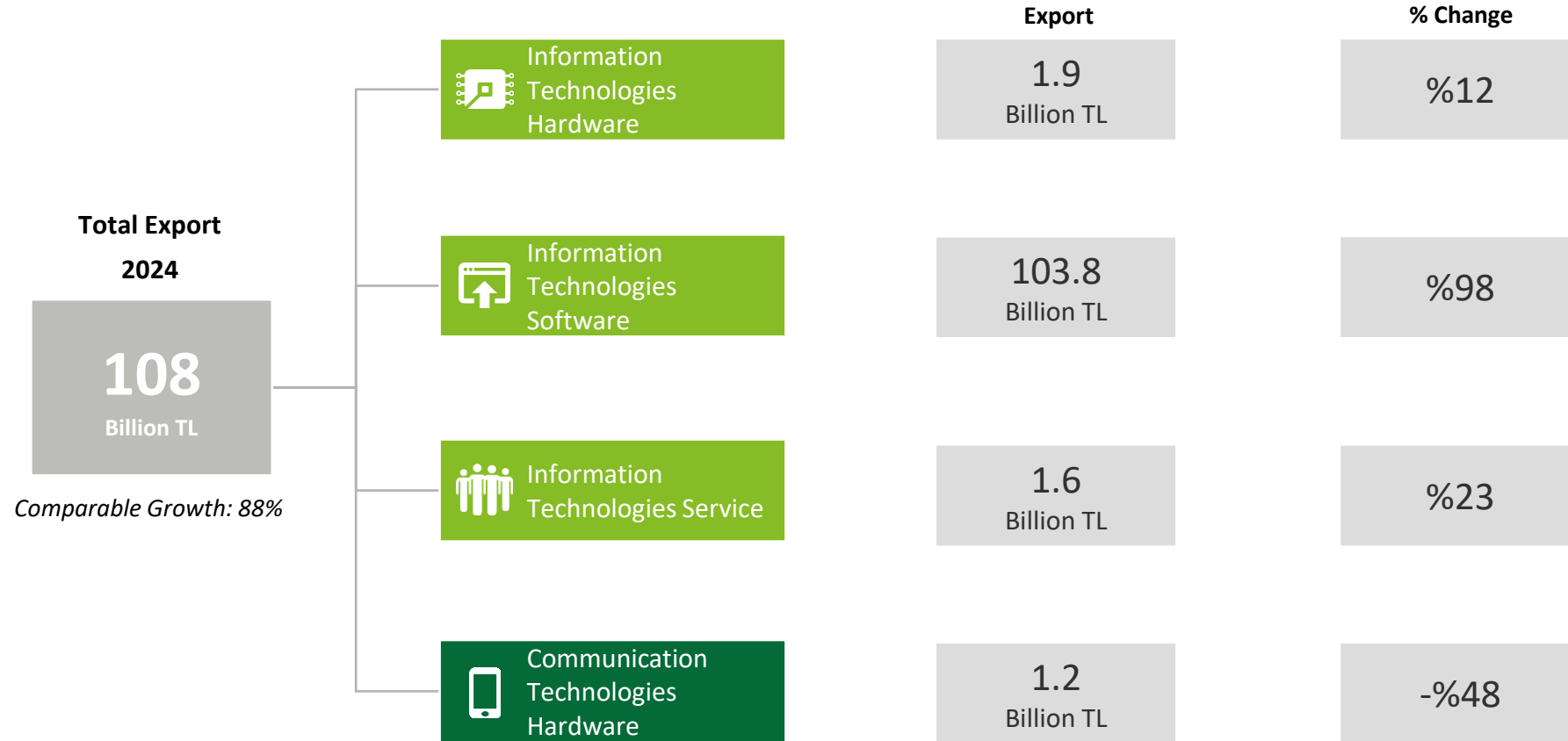
# Technology Development Zones

Technoparks in Turkey	2023	2024	Change
Number of Technoparks	101	105	%4
Number of Companies	10.275	11.550	%12.4
Number of Employees	108.360	118.500	%9.6
Total Turnover (TL billion)	207.5	371.5	%79
Total Export (TL billion)	47.5	98.6	%107.5
<i>Turnover / Company (TL million)</i>	20.1	32.1	%59.7
<i>Turnover / Employee (TL thousand)</i>	1.914	3.135	%63.8
Export / Technopark (TL million)	470.2	938.6	%99.6
Export / Turnover	%23	%27	%4
Technopolis Turnover / Total Turnover (TL billion)	%26.4	%30.9	%4.5

Source: T.C Sanayi ve Teknoloji Bakanlığı

# Information and Communication Technologies Sector Exports

The largest share in total exports is in the Information Technologies Software category.



\*Rate excluding mobile phones.

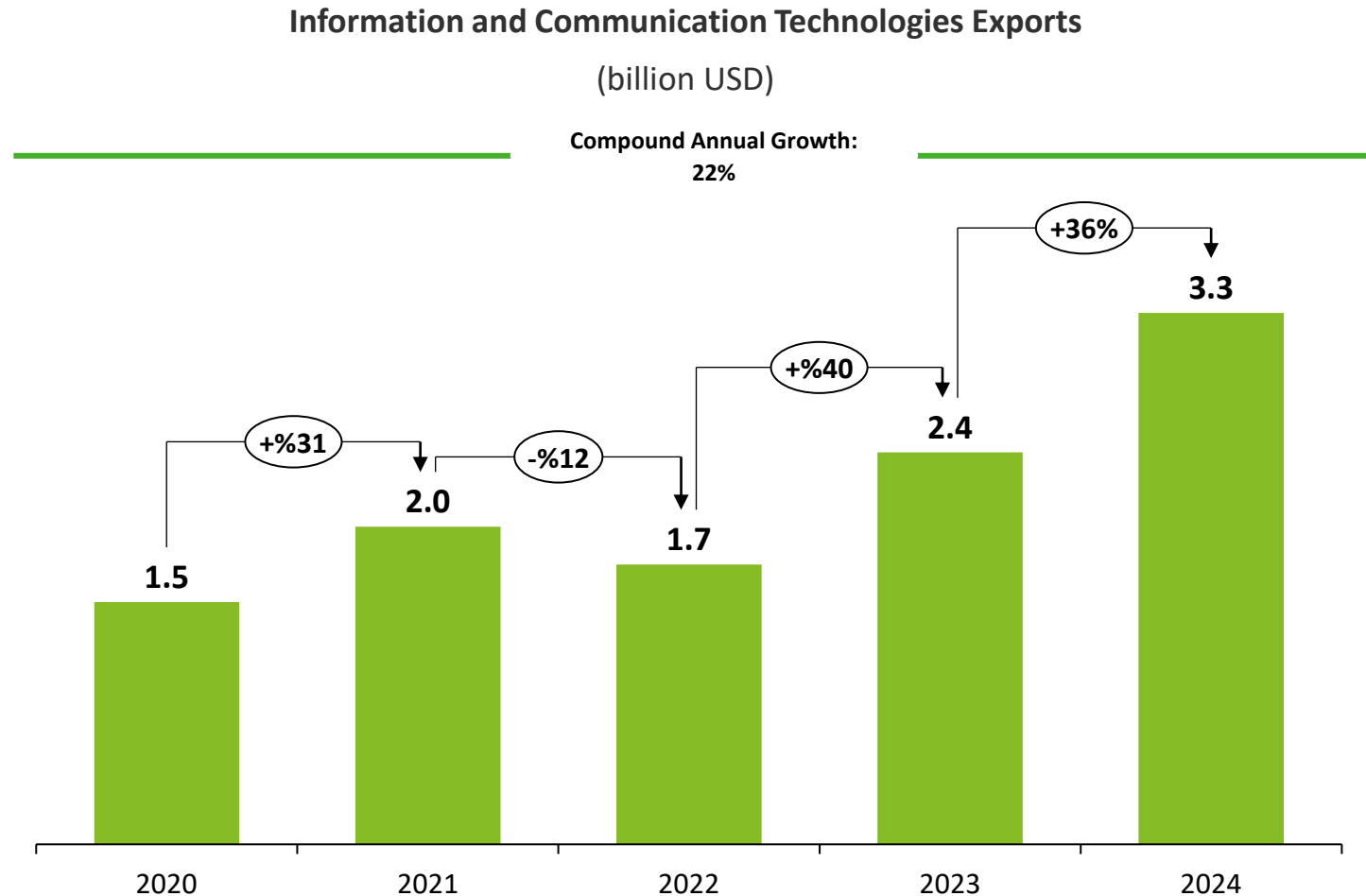
Annual changes represent comparable growth rates.

Note: Totals may differ due to rounding.

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# Information and Communication Technologies Sector Exports

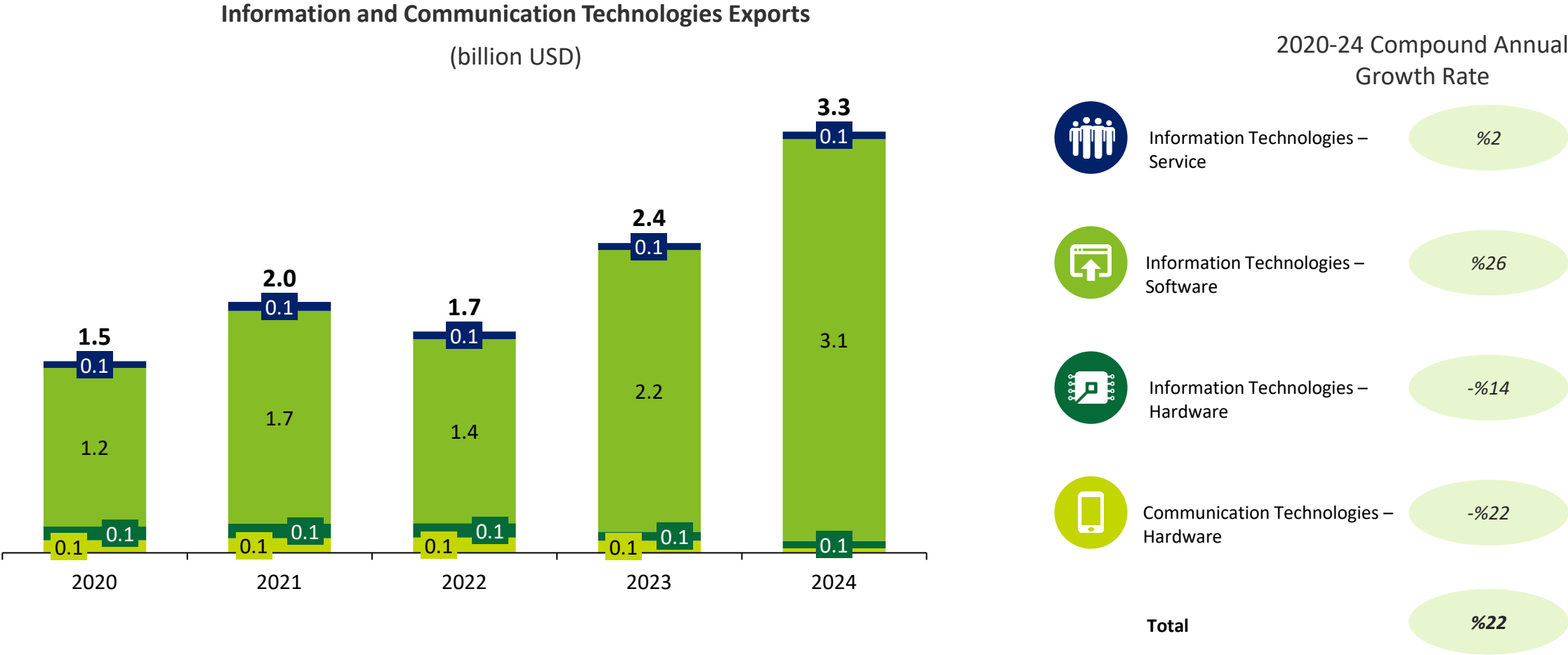
The total exports of the sector grew by an average of 22% annually in dollar terms between 2020 and 2024.



- The annual average growth in exports in dollar terms between 2020 and 2024 was approximately 22%. Although a contraction was observed in dollar terms between 2021 and 2022 with the changing exchange rates between 2021 and 2022, this situation recovered in the 2022 and 2024 period and turned into a strong increasing trend with growth of 40% (2022 and 2023) and then 36% (2023 and 2024).
- The most important category supporting the increase is the growth in the Information Technologies - Software category, which also has the largest share in exports.

# Information and Communication Technologies Sector Exports

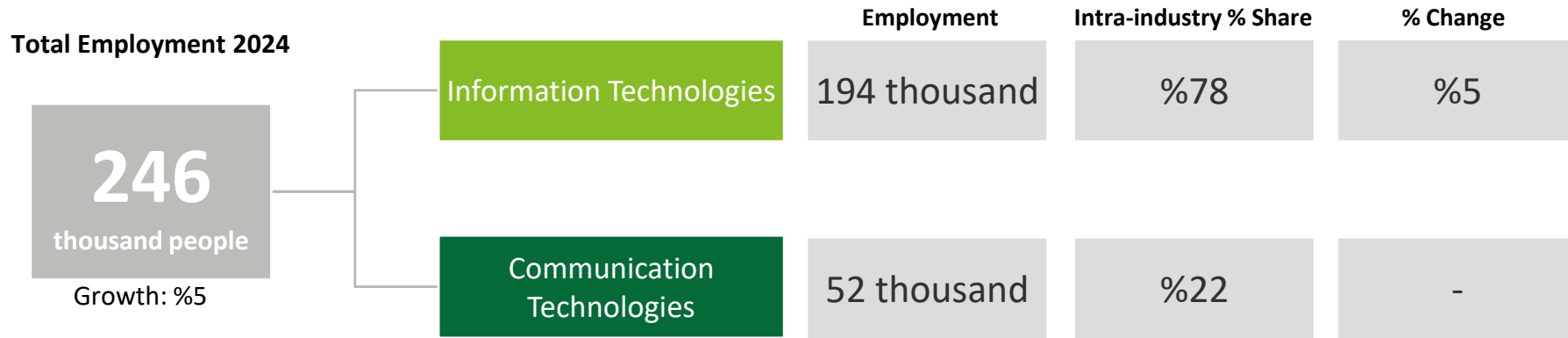
Development by subcategories - billion USD



Note: Totals may differ due to rounding.

# Employment (thousand people)

Total employment in the sector reached 246 thousand in 2024 with a growth of 5%.



\*: Survey Participant Companies

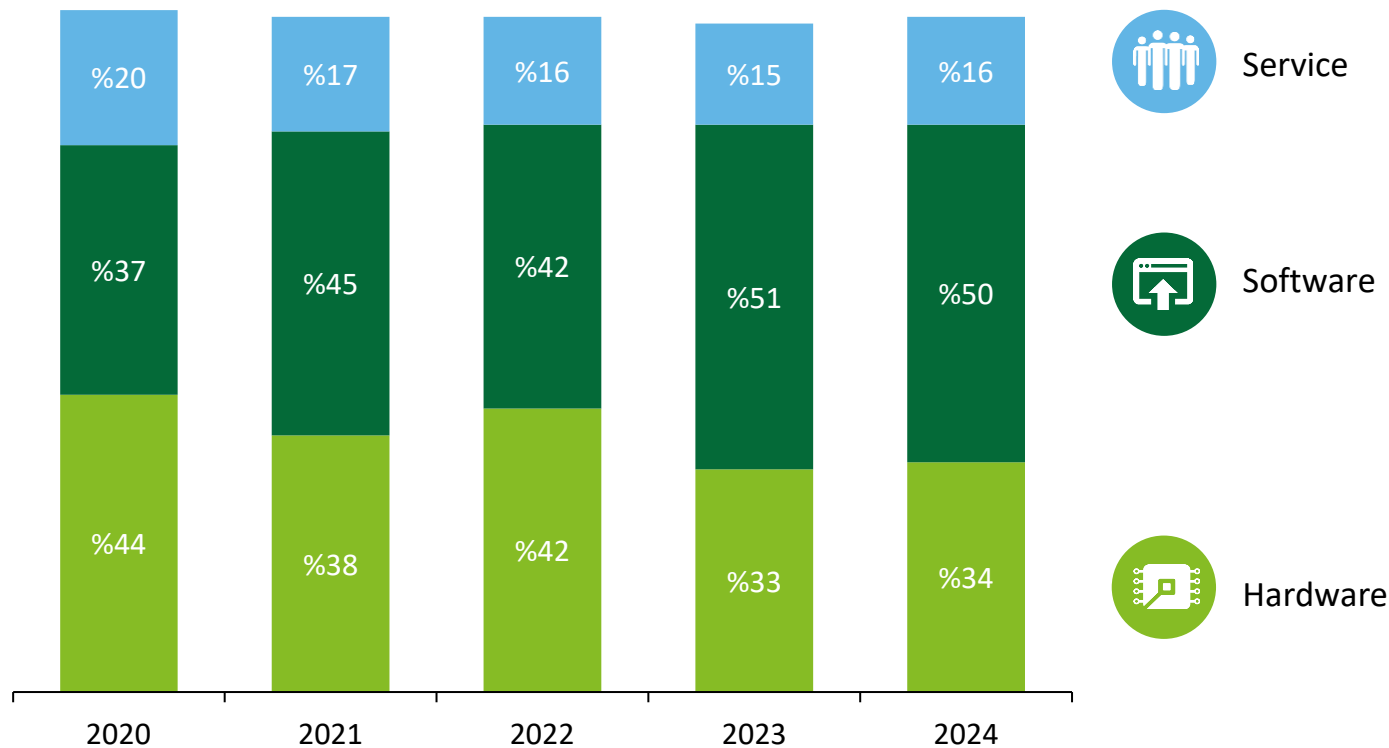
\*\* : Survey Participant Company, BTK and T.R. Ministry of Industry and Technology data

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# Change in Sub-Category Shares by Year

In 2024, the Information Technologies market maintained its stability with a balanced component distribution, with software continuing to lead.

Information Technologies Market Components



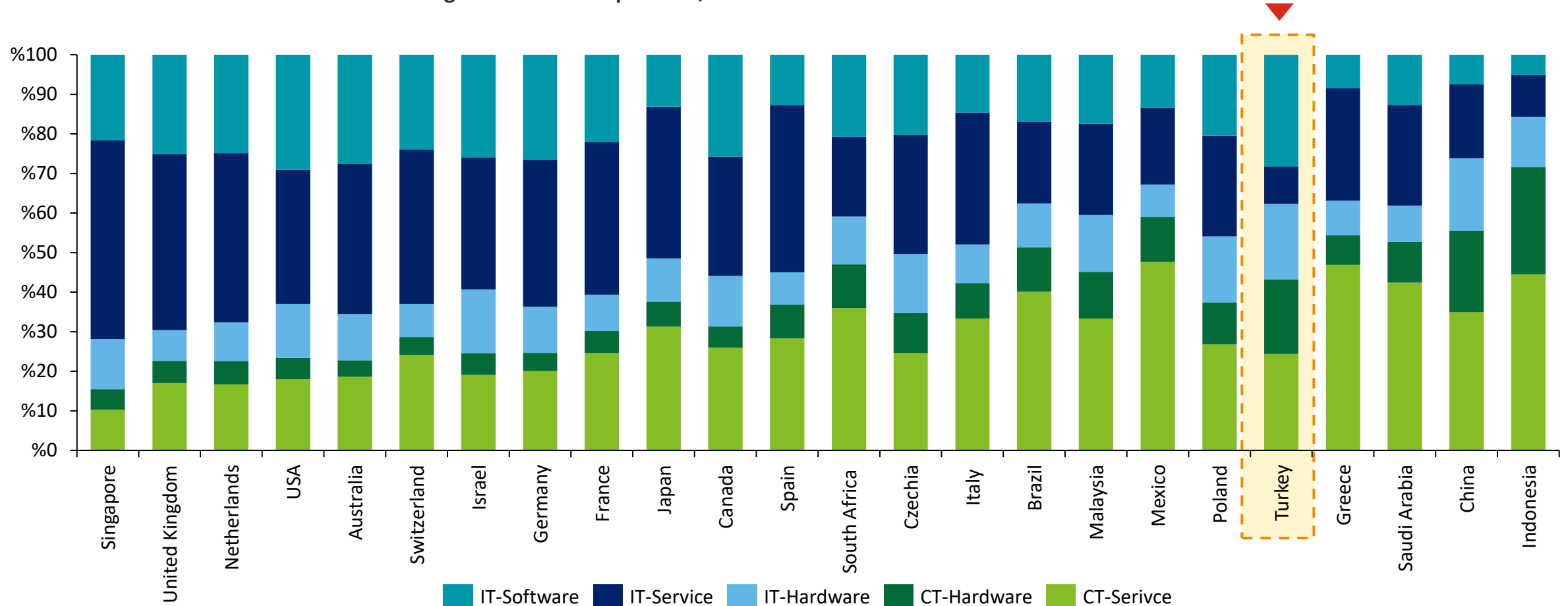
- In 2024, no significant structural change was observed in the Information Technologies market components compared to the previous year. The market share of software, which was 51% in 2023, showed a slight decline to 50% in 2024, but still maintained its position as the largest component.
- On the hardware side, after the decline between 2020 and 2021, a partial recovery was seen in 2022, but it is noteworthy that this share narrowed again in 2023 and 2024, falling to 34%.
- The service category, on the other hand, remained relatively stable, fluctuating between 15% and 20%, maintaining its market share.

Note: Totals may differ due to rounding.

# Change in Sub-Category Shares by Country

While the prominent share of software in the Turkish IT market draws attention, the relatively low rate of services reveals the differentiation between the components.

Information and Communication Technologies Market Components, 2024

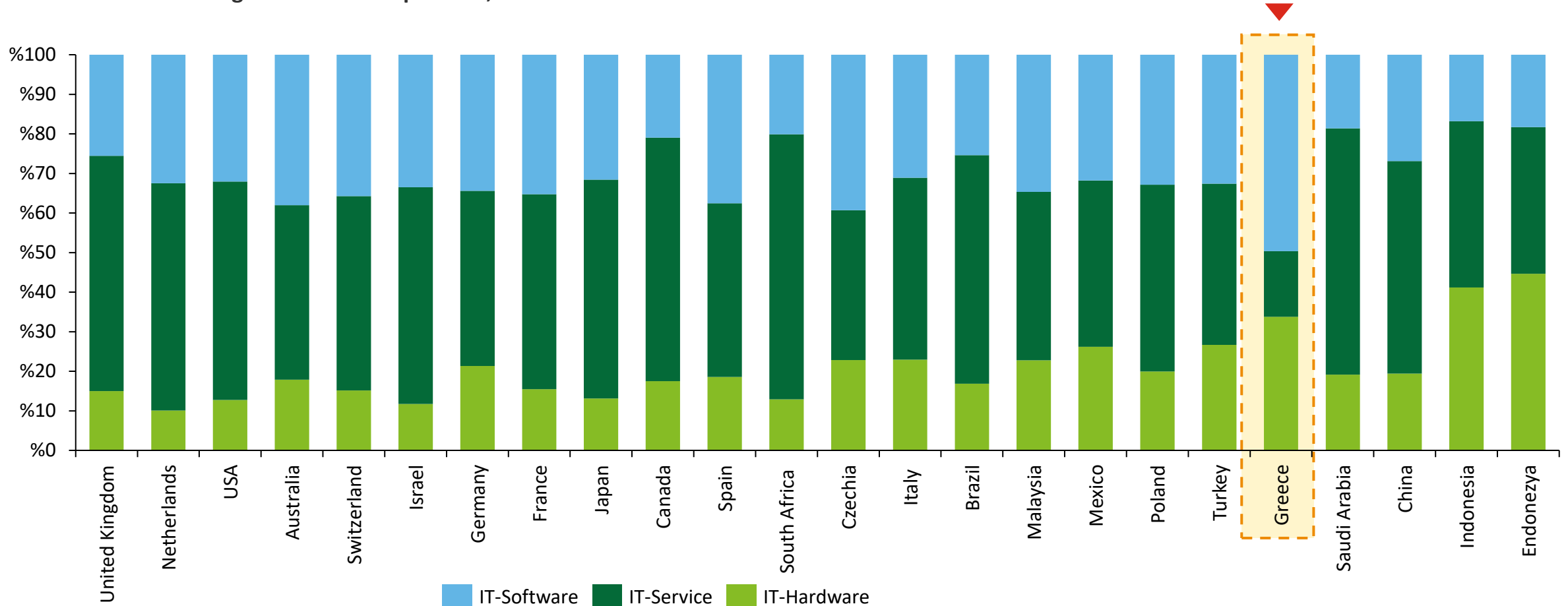


Source: TÜBİSAD, Gartner, Deloitte analizi

# Change in Subcategory Shares by Country - Information Technologies Market Components

The software-focused structure in the IT market differentiates Türkiye from hardware and service-focused countries.

## Information Technologies Market Components, 2024



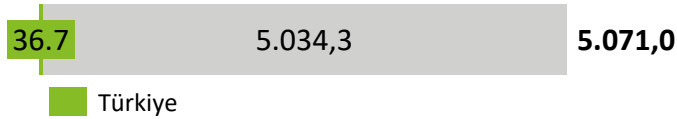
Kaynak: TÜBİSAD, Gartner, Deloitte analizi

# Position of the Information and Communication Technologies Sector



## Türkiye in the Global ICT Market

(billion USD)



**%0.72**

Türkiye ICT Market  
Share in the Global  
ICT Market

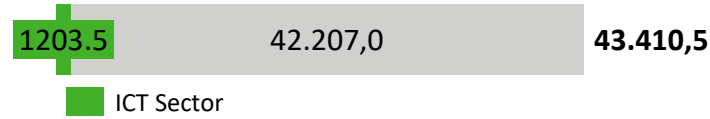
↓ -0.02

Compared to 2023



## ICT Sector in Türkiye's GDP

(billion TL)



**%2.77**

ICT Sector Share in  
Türkiye's GDP

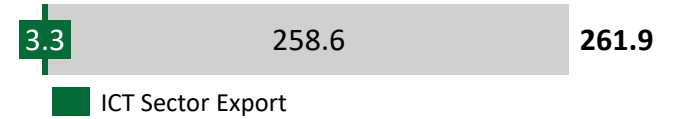
↓ -0.22

Compared to 2023



## ICT Sector Exports in Türkiye's Total Exports

(billion USD)



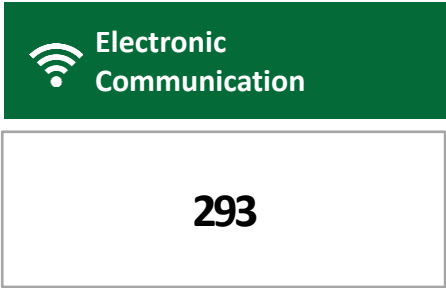
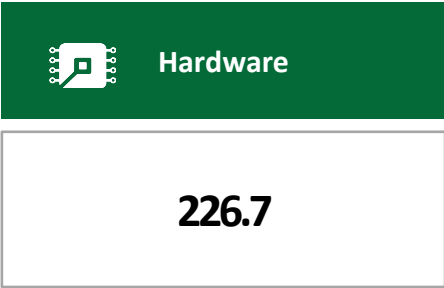
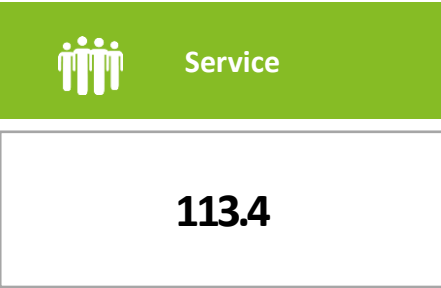
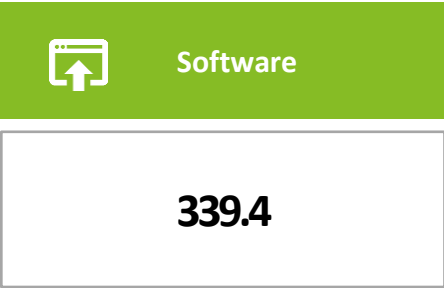
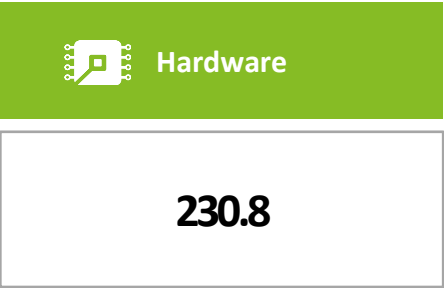
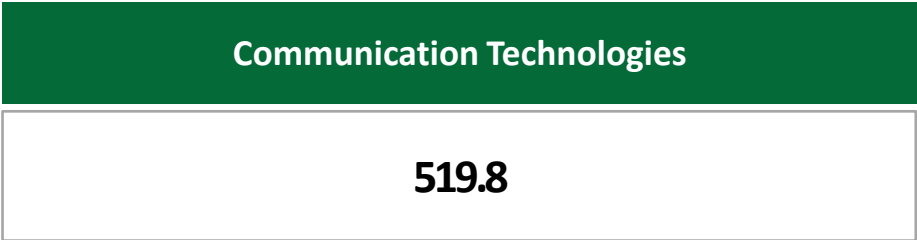
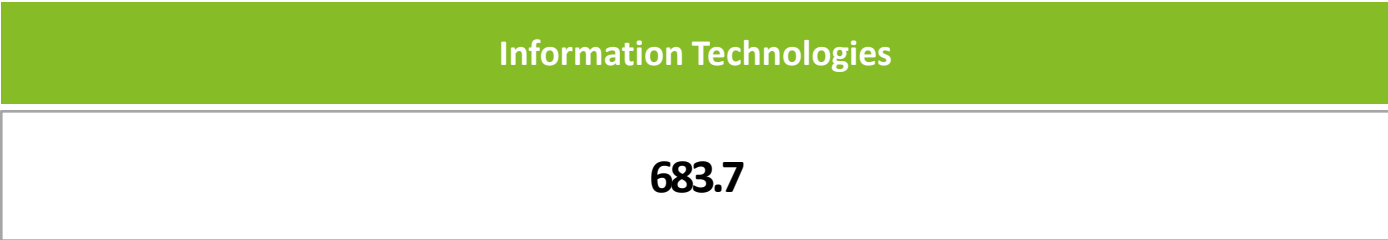
**%1.26**

ICT Sector Share in  
Türkiye's GDP

↑ +0.31

Compared to 2023

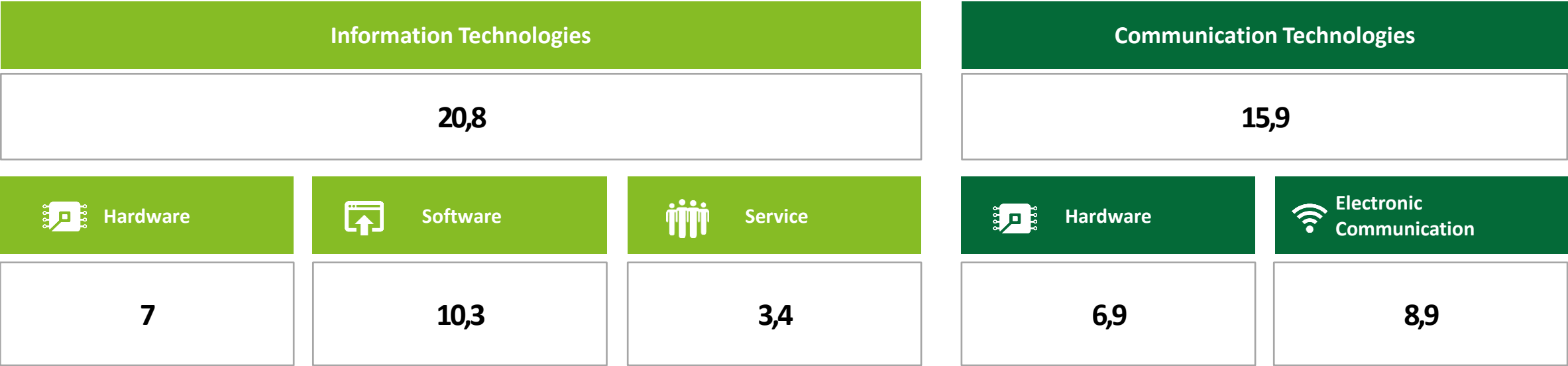
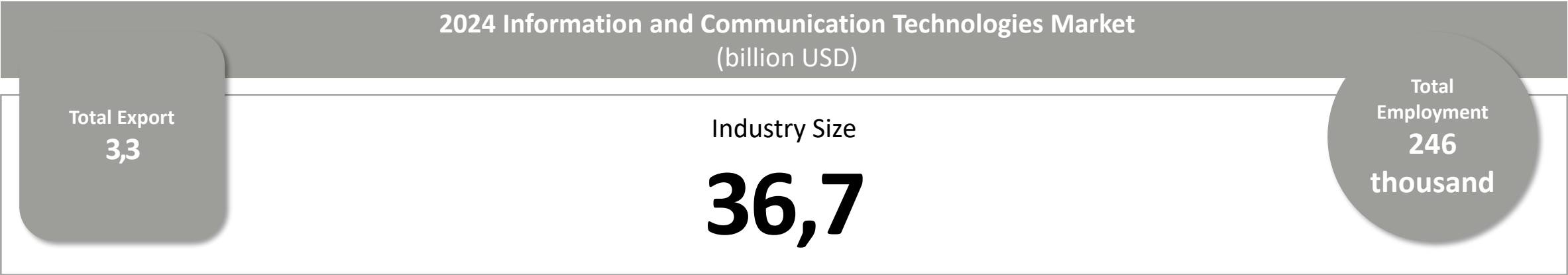
2024 Information and Communication Technologies Market  
billion TL



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# 2024 Information and Communication Technologies Market

billion USD



Note: Totals may differ due to rounding  
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## THANK YOU

We would like to thank the Ministry of Industry and Technology of the Republic of Turkey, the Information Technologies and Communication Authority, Context, TUBISAD members and sector companies for their valuable contributions to our work.

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