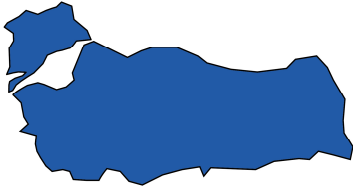


# Turkey



## Market Data



GDP 514,2 bn. € (exp. 2010)  
 Growth 7,8 % (exp. 2010)  
 Population 73,2 Mio (exp. 2010)

ICT Invest 21,6 bn. €  
 Ranking EU 27 Platz 6 in the major IT markets  
 Reseller number > 600  
 Economic centres Istanbul, Ankara, Izmir

Source: gtaï, EITO, Compubase, ISPAT



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## Turkey leads economic growth

The Turkish economy has shown top-speed growth compared with the other national economies in the world in the first half year of 2010. According to the latest prognoses a growth of 7.8 % in comparison to the average 2.3 % in Europe is expected (source: IWF).

IT expenditures even present an **average growth of more than 12 %**. In the more difficult years of 2009/2010 the growth of IT expenditures still reached more than 7 % (source: EITO)

## Good starting position

Turkey is a young, well trained, multicultural country despite the dominant international perception. Referring to the population pyramid 65 % of the population is younger than 35 years.

In total 93 universities educate approx. 400,000 students, with 32 universities teaching in English.

(source: ISPAT – Turkish Agency for economic and investment promotion)

The strong and quickening change of demand caused by growth and limited by the existing resources has led to a more efficient use of resources and application of software.

## Internationally competitive IT

The Turkish market includes local providers of business software from various fields (public, health care, HR, ...). For foreign solutions providers this means that the market does already exist. The growth rate is increasing rapidly, which is typical for an "emerging market" and offers space for external SW solutions. The solutions by Turkish software producers are exported to more than 80 countries today and consequently are also competitive on an international basis (source: TÜBISAD)

## IT and telecommunication structures

The ICT market sales in Germany have currently reached approx. 140 bn. €. This is the top position in the ranking of the 27 EU countries. The respective value in Turkey is **21.6 bn. €**, putting the country in **6<sup>th</sup> place** if Turkey was included in this ranking. Thus Turkey follows immediately after Italy and Spain. A respectable place especially taking into consideration the growth rates of 7 - 12 %.

Currently the sales part of IT solutions (without the telecommunication sector) has reached approx. 5 bn. €. The telecom market is the 4<sup>th</sup> largest in Europe and the 12<sup>th</sup> largest in the world. (Source: Compubase)

## Turkey and its agglomerations

Somewhat more than 50% of the total ICT investments take place in the Istanbul area. Two other centres are Ankara and Izmir. This clear structure makes a market entry calculable for external solutions providers.

Some analysts value the Turkish market as important as the BRIC countries (Brazil, Russia, India, China) and view Istanbul as the site of an international finance centre. (Source: ISPAT)

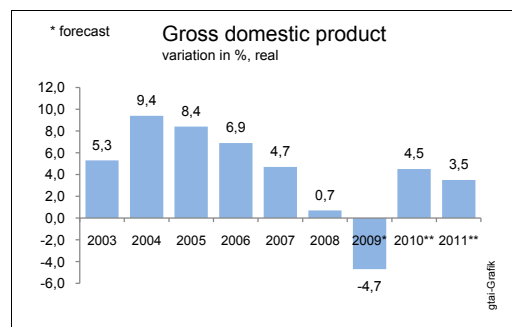
## Back office / call centre

According to a survey by Ernst&Young, Turkey holds the 3rd or 4th position of the most important countries in these "business support

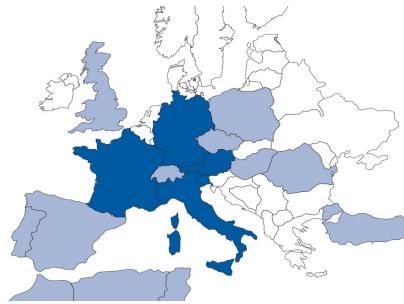
services". In 2010 alone, 45,000 new jobs were created in this sector and sales increased by 20 %. An important sector of the service industry, which will continue rising significantly again in the years to come.

## ERP, CRM, DMS – business solutions

The growth market Turkey shows strong dynamics in the classic business fields ERP, CRM and DMS. The software equipment in Turkey has increased by 500% during the past 10 years. Analysts expect a continuing trend – be part of it!



Germany	France	Italy	United Kingdom	Austria	Portugal	Hungary	Czech Republic
Switzerland	Spain	Rumania	Poland	Türkey	Tunisia	Marocco	Algeria



### Performance requirements

We act as interim managers for our customers, carrying out the task of **partner recruiting for a specific time**. Of course we contribute our experience and market knowledge within the frame of our activity in **product** and **partner marketing**. The **partner management** is up to our customers. If required we carry it out for a defined period.

### How do we proceed?

In a workshop we examine your partner communication and your concept together with you and the recruiting people. Eventually we develop the partner profile together, which shall be used for the first communication in the market. We evaluate your partner contract and your partner concept with the target of initiating successful (strong-selling) partnerships as efficiently as possible.

### What does partner recruiting mean to us?

Especially in culturally foreign markets or in other sectors it is an advantage to assign a service company such as IIC with the communication with a potential partner. On the basis of the defined partner profile we identify reasonably suitable partners and consequently communicate directly with the market players in the target market you would like to enter.

As soon as it is about foreign markets, we make use of **our colleagues on the spot**, who carry out **business development** for you on the basis of their many years of knowledge of the market and the market players as well as language and sales competence. We always act as IIC and so represent the neutral **technically sound consultant** for potential partners, with the concept for “sales”.

### The advantages of IIC !

We are repeatedly asked about the advantages of IIC compared with own resources:

- Our only job is partner recruiting and this is the reason for a broad wealth of experience
- We utilise existing contacts and expand our network continuously by research
- We use synergies from communication
- We can speak with the competitors' partners without problems
- Our activities are basically limited in time (the first step up to 6 months)
- We also participate in success and thus depend on achieving it,
- ...

### The concept

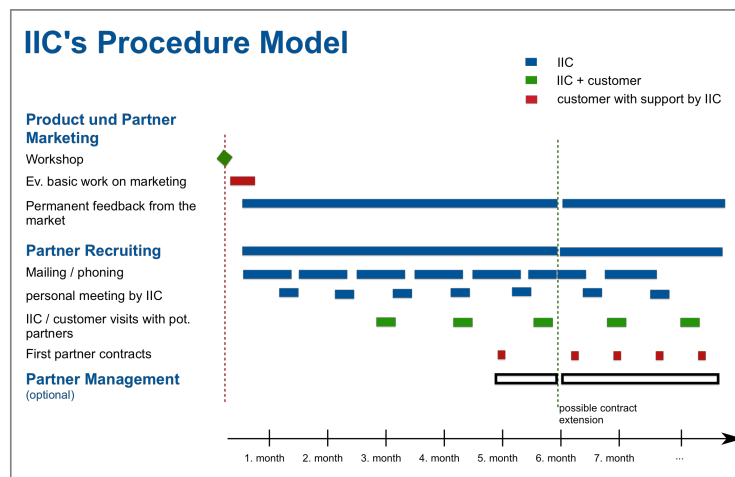
As neutral consultants we are organised in a “recruiting project” together with you, which is subject to the rules of project business (regular reporting, steering group, ...). Our aim is to gain partners for you in an efficient, successful manner. In order to reach this target we additionally mirror our results and findings from the market communication to you, so

as to develop, together with you, common modified communication if needed.

### How do we finance our activities?

Our concept is based on 3 pillars: the first includes a fixed sum per month for the contract period and the 2 other pillars are pure success components. On the one hand a contract commission as soon as a partner signs a contract with you and on the other hand a participation in the licence sales over a period of 3 years after a company has become a partner.

-> a fair and acquisitive concept for both sides!



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