



ICT MARKET IN TURKEY 2012: Opportunities for U.S. Exporters

Overview

This report, prepared by the U.S. Embassy's Commercial Service in Ankara, provides an overview of the market and follow-up steps for American exporters to make sales in this dynamic market. With an estimated average growth rate of 9% for the past 3 years, with an expected growth rate similar for 2013, Turkey ranks as one of the fastest growing markets in the world. With a population of 75 million and half of the population being under 30 years of age, the market is ideal for targeting ICT services and products.

Best Products/Services

- IT Cyber Security
- Consumer Electronics
- Notebook PC's
- Audio Visual Equipment
- Wireless equipment / services
- 3G and 4G related technologies/services
- Telecomm services
- Content and media
- Fiber Optic Solutions
- Smart Phones

3G/4G related technologies and services, online services, content and media services, E-business, personalized services, music/video downloads, games, multi-play, and other mobile entertainment services will be best prospects.

ICT Market Overview

Turkey's Information and Communication Technologies (ICT) market size reached \$34 billion in 2011, with a breakdown of \$25 billion in Telecommunications and \$9 billion in Information Technologies. (ref. Interpro). The Turkish ICT sector continues to be one of the key growth sectors in Turkey with an estimated growth of 8-10% for 2012, despite the ongoing economic global crisis.

Internet in Turkey

(ref: www.btk.gov.tr - BTK (Turkish Telecom Authority) / (www.agentschapnl.nl)

- According to the April 2011 BTK (Informatics Council of Turkey) survey , “Household Information Technology Usage”, 42.9 % of households have internet access throughout Turkey.
- There are over 16.68 million internet subscribers as of first quarter 2012.
- There has been an increase in internet subscriptions of 18.2% compared to the last trimester. The growth rate of the number of total internet subscribers has been rapidly growing and stands at 81.2%.
- In the last quarter 2012, the number of xDSL subscribers was 6.7 million subscribers with a 0.6% decline compared to the previous quarter.
- The OECD recently called for more initiatives to increase public use of ICT, with research from Eurostat showing that Turkey is among the countries in which internet access is low. The research found that only 39% of Turks had computers at home and that Turkey was below the EU average in terms of computers per household and internet access. (www.agentschapnl.nl)
- Although other operators in Turkey are providing ADSL services, they are reliant on the incumbent Turk Telekom's ADSL infrastructure (service provided by another Turk Telekom company- TTNET). (www.agentschapnl.nl)
- TTNNet has the biggest share in the internet adsl market. Superonline, Dogan Telekom, Vodafone Net and Turknet follow. Breakdown is as follows:

Internet Operators Market Share	%
TTNet	84,13
Superonline	6,42
Dogan Telekom	3,80
Vodafone Net	1,85
Turknet	1,56

IT Market

A significant increase is expected in PC usage as the Ministry of Education plans to increase the number of computers and internet connections. The National Fatih Project is one such development project to provide schools with 2 million tablets, thousands of smart boards and high speed internet connection, project is worth an estimated \$5 billion. Schools in remote areas are to be connected to the net via satellite with the cooperation of the Turkish satellite company Turksat.

The Turkish IT services market is expected to grow at a 14% over 2012-2016. The Turkish IT market is projected to achieve an compound annual growth rate (CAGR) of 16% during 2012-2016. Computer penetration is expected to pass 50% by 2016. Turkish spending on all categories of IT services is projected at US\$1.5 bn in 2013. Banks and Telco's are expected to be among the lead organizations spending on new IT platforms (www.agentschapnl.nl).

There has, however, been a recent shift in the driving forces behind the IT industry in Turkey. Although until recently the the industry was focused on desktop and notebook sales, the consumer electronics market has significantly caught up and increased its share of the market. The consumer electronics market in Turkey is estimated at \$3 billion. While the rest of the world averaged an increase of 10% in the consumer electronics market in 2011, the Turkish market averaged 30% growth..

Traditionally significant PC sales were confined to Istanbul, Ankara and Izmir, but now PC sales have received new momentum as the focus of demand has shifted towards the Anatolian region; this is expected to continue as the rate of PC sales rises. The PC sales have ripple effects increasing the sales of other items such as ADSL subscriptions, modems, software and other IT products and services.

Computer Sales

Turkey's computer hardware sales are projected at \$6.1 bn in 2013 and are forecasted to reach around \$10.6 bn in 2016. The market is forecast to remain in positive growth territory in 2012, with revenue forecast to grow at a 17% CAGR in 2012-2016.

Software Market

The software market in Turkey is projected at \$933 million in 2012 and is forecast to reach \$1.5 bn in 2016, with an expected growth rate of 13%. However, much will depend on the success in bringing down illegal software use, which at 65% is nearly twice the global average.

Telecomm Market

In the telecommunications market, as of March 2012, there are 65.8 million mobile subscribers, corresponding to 88% penetration rate. In the first quarter of 2012, 64% of mobile subscribers are prepaid subscribers; and the rate of invoice subscribers have increased from 32.7% to 36.4% last year. The number of total subscribers of GMPCS (Global Mobile Personal Communications by Satellite) mobile phone service is 5,326.

As the first-trimester of 2012 ends,; Turkcell has 52.50%, Vodafone has 27.83% and Avea has 19.67% share of the mobile telecom market.

As per the report of the Informatics Council, in the first quarter 2012, the number of calls were 14,023,844; and total call time was 19,538,608 minutes. In the first quarter 2012, total mobile traffic volume has been 39.08 billion. When traffic data in the first quarter 2011 are compared with the previous trimester, it shows that total traffic grew by 1.5%; compared with the same period last year and that the annual growth rate is 15.1%. (www.btk.gov.tr)

The breakdown of subscribers are as follows: Turk Telekom has 14.83 million fixed-line telephone subscribers as of the first quarter 2012, a decrease from previous high of 17 million fixed line subscribers. This suggests a significant loss of market share to gsm operators, 6.5 million ADSL lines and 13 million GSM mobile subscribers via AVEA.

Turk Telekom owns 99.9% of TTnet, Argela, Innova, Sebit, Sobee ve AssisTT. Turk Telecom also owns 81% of AVEA, one of the three GSM mobile operators in Turkey. And they have a minority share of ALB telecom in Albania. 55% of the shares of Turk Telekom belong to Ojer Telecom Inc. and 30% belongs to the Turkish Treasury. The remaining 15% is floated on the Istanbul Stock Exchange (IMKB). The value of Turk Telekom was over \$15 billion in 2011.

The total number of GSM cellular service subscribers reached almost 65 million with an approximate penetration rate of almost 89%. The total telecom equipment and services market grew to \$20 billion and is expected to expand in 2012 as the GSM sector remains the driving force as subscribers are expected to use more and more 3G services. The total number of 3G subscribers reached 35 million. Fixed line subscribers are almost 15 million, reaching almost 100% of the households.

The three GSM cellular operators, Turkcell, Vodafone and AVEA and the fixed line operator Turk Telekom invested in equipment and services at a total value of \$3 billion to expand their services. Turkcell has almost 36 million subscribers (56.6% of total GSM cellular

subscribers), Vodafone has 15 million (24.5% of subscribers) and AVEA has 12 million (almost 19% of subscribers). Turk Telekom, Turkcell, Vodafone and Avea have all increased their revenues. Turk Telekom's total net sales revenues was 22.4 billion TL (12.4 billion dollars) in 2012. Other operators' revenues were 5.66 billion TL (\$3.1 billion) in 2011 and total industry revenues reached 28 billion TL (\$15.5 billion).

In 2011, Turk Telekom's investments increased by 24.77%, Turkcell's by 14.75% and Vodafone's by 23.34% compared to 2010. Avea's investments were decreased by 4.64% compared to the previous year. In the first quarter of 2012, total investment amount of the four large operators have been approximately 760 million TL (\$422 million).

Turk Telekom seems to be the most profitable operator of the industry. Turk Telekom's EBIDTA (Earnings Before Interest, Taxes, Depreciation and Amortization) margin is 51.1%. It is followed by Turkcell with 29.3%, Vodafone with 17.0% and Avea with 9.91%.

While mobile call traffic is increasing every year, fixed call traffic is decreasing. Talk time in 2010 was 149.5 billion minutes, and increased to 168.9 billion minutes in 2011. 147.1 billion minutes out of a total of the 168.9 billion minutes consisted of mobile traffic.

36,980 people are employed in this industry. The number of Turk Telekom employees is 24,148, the number of employees of mobile operators is 8,377 and the number of employees of other operators is 4,455. In other words, Turk Telekom has the 65.30% of industry employees, mobile industry has 22.65% and other industries have 12.05%. (Ref: ICT Magazine)

Subscriber penetration for fixed lines is 23.5% and is not expected to increase due to hard competition from GSM cellular operators. With the introduction of 3G, IPTV, online services, content and media services, E-business, personalized services, music download, games, multi-play, video services, other mobile entertainment and soon 4G, the services segment has been developing rapidly, creating new business areas and revenues.

Turk Telekom will continue to be the major buyer of fixed-line telecommunications equipment and technology. Turk Telekom's main revenue growth came from ADSL revenues (29%) and from mobile revenues (14%) through AVEA. Turk Telekom introduced a new technology which provides fixed line services through the GSM mobile phones that have Wi-Fi capability. Consumers can now use both fixed line services and mobile GSM services through same mobile phone by uploading special software. Turk Telekom will also introduce 3N technology through fixed Internet and other ISPs by using its Wi-Fi capabilities spread

around the country. 3N technology will provide mobile internet services.

Over 40 private long distance telephone companies have been also operating over the last 5 years, mostly using VoIP via an interconnection agreement with Turk Telekom. Some of these companies have established or continue to establish their own networks.

BTK (Turkish Telecom Authority) has registered over 60 million GSM cellular phone handsets in Turkey. BTK estimates that Turkey imports approximately 10 million mobile handsets every year. Many subscribers continuously change their cell phones with new models sustaining consistent growth in the handset market. Apple's Iphone has been extremely successful in the market in the past two years.

GSM cell phone sets suitable for video downloading and TV broadcasting equipped with wide band Internet access will be the driving force for growth in this sector. These new technologies will be the basis for the enhanced 3G and 4G operations.

In Turkey, Northern Telecom, Alcatel, Siemens, Ericsson and NEC supply majority of fixed lines switches, trans-multiplexers, and other telephony equipment. U.S. companies can be competitive in software programs required for customer databases, emergency call services, corporate management and intelligent network operation centers. Motorola, Nokia, Ericsson and Siemens are the main GSM switch and base station suppliers. U.S. companies can be competitive in new software products required by GSM cellular operators to provide new services to their clients and better corporate and client management.

The government's E-Government projects still continue to move forward, although most of the projects have been completed. The Turkish ICT market is far from being saturated and still has significant growth potential as the technology driven young population continues to invest in computers, consumer electronics, software and ICT services. The ICT market has grown every year and even in times of global crisis the growth has only dropped slightly, a good indicator that the ICT industry remains an attractive industry in Turkey. (UNDP, Harnessing ICT For Development In Turkey).

This attractive consumer electronics trend has lured many international and national electronic retail supermarkets to establish themselves in the market. German Mediamarkt, British Electro World, Turkish Teknosa, Vatanbilgisayar and Gold Bilgisayar have been competing for a number of years in Turkey.

Smart Phones

- According to “Our Mobile Planet Data”, the smart phone usage rate in Turkey is 14% in 2011. (<http://kisalt.com/2s2>)
- When growth figures for smart phones are taken into account at between 1.4 and 1.7, it shows that the actual usage rate is more like 20-24%. (www.sorula.com)
- The number of smart phone sales was over 3 million in 2011. (www.sondakika.com)
- The smart phone market is expected to grow by 50% in 2012; and 35% of all mobile phones will be smart phones.
- There will be 22 million smart phones at the end of 2012, 35 million smart phones in 2013; and by 2014, 45-50 million smart phones are expected to be in the Turkish market. (Ref: General Manager of KVK, Özcan Ermiş)

Following is the market size estimate for the IT Sector (excluding the telecommunication sector)

Unit: USD thousands

	2009	2010	2011 (estimated)	2012 (estimated)
Total Market Size	5,600	6,160	6,776	7,454
Total Local Production	2,300	2,530	2,783	3,061
Total Exports	1,200	1,320	1,452	1,597
Total Imports	4,500	4,950	5,445	5,990
Imports from the U.S.	1,950	2,145	2,360	2,596
Exchange Rate: 1 USD	TL 1.54	TL 1.49	TL 1.54	TL 1.54

Following is the market size estimate for the Telecommunication Sector (excluding IT):

Unit: USD thousands

	2009	2010	2011 (estimated)	2012 (estimated)
Total Market Size	19,300	21,000	23,100	25,310
Total Local Production	12,800	14,000	15,400	16,940
Total Exports	2,900	3,500	3,850	4,335
Total Imports	9,400	10,500	11,550	12,705
Imports from the U.S.	490	560	6,160	6,778
Exchange Rate: 1 USD	TL 1.54	TL 1.49	TL 1.54	TL 1.54

Total Market Size = (Total Local Production + Total Imports) – (Total Exports)

Data Sources: Government of Turkey statistics bureau, Interpro Medya
www.interpromedya.com.tr , <http://www.x-rates.com/cgi-bin/hlookup.cgi>

The young population of Turkey continues to drive the sales of pc's, cell phones, consumer electronics and cellular voice and data services. The audio visual market is expected to rise further as smart buildings are constructed with audio visual and control room installations and supporting entertainment consumer goods and services such as IPTV.

Fiber Optic solutions expected to gradually gain market access as infrastructure investments are made by Turk Telecom and TNet and other ISP's.

The cyber security segment is expected to grow as corporate and government ICT security systems remain to attract significant funding. Security of corporate data as well as identity theft, network security against attackers, viruses, trojans and storage of network activities are among the top priorities with particular emphasis on providing legally sustainable evidence used in courts of law.

The Turkish Government has increased its expenditures in hardware and software in battling cyber threats. In order to implement these defenses the Departments of Justice, Interior, the Turkish National Police, and the Turkish military will continue to update their cyber security technologies.

The Turkish Government plans to invest \$5 billion IT Projects – the bulk of this figure coming from the FATIH Project. The FATIH Project is a project with the goal of having every school under the Ministry of Education set up an IT lab and get connected to the internet – an ambitious project expected to reach 570,000 classrooms over the next five years.

The project also encompasses e-learning platforms and smart usage of IT technologies in the education field. The education sector, including IT investments belonging to the Ministry of Education and universities, has a lead share with approximately 43% of the GOT (Government of Turkey) IT investments.

TDZ (Technology Development Zones -Techno Cities)

Recently established, Technology Development Zones ("TDZ") are affiliated with major universities (and are usually located on campuses-also called Techno City) to increase technology development and cooperation. Software developers benefit from significant tax and investment incentives provided by the government in these zones. The Turkish government has implemented new legal frameworks to encourage R&D and IT spending, which supports the growth of the sector. Income earned as a result of R&D activities by companies located in TDZs is exempt from tax. Additional incentives include contributions to the social security premiums of R&D staff. These TDZs are open to foreign investors who have the same benefits of their local counterparts. As Turkey has many competent young and dynamic computer engineers and software developers , TDZs have proven themselves to successful ventures.

IT Security Developments in Turkey

Corporate and government IT security systems are a particular focus in the Turkish market. Corporate data security as well as identity theft, network security against attackers, viruses, trojans and storage of network activities are among the top priorities with particular emphasis on providing legally sustainable evidence used in courts of law.

The Turkish Government has increased its expenditures in hardware, software and education in battling cyber threats. In order to implement these defenses the Departments of Justice, Interior, the Turkish National Police, and the Turkish military have all updated their information security technologies. All governmental and military institutions have been training their personnel up to international standards and have been inviting expert professionals from abroad to provide further training. Resources indicate that the Turkish government and private sector institutions are looking at new technologies to enhance their IT security systems.

One such project, representing a significant improvement in the Turkish Government's efforts to centralize information and information security has been spear-headed by the Turkish Department of Justice. It has implemented 'UYAP – National Judiciary Informatics System' which is in line with the National Plan for the Adoption of the Acquis (NPAA) to achieve objectives stated in the 'EU' Accession Partnership. Modernization of justice and penal reform are included as fundamental priorities in the Accession Partnership and in the NPAA.

UYAP has been carried out to establish an electronic network covering all Courts, Offices of Public Prosecutors, and Law Enforcement Offices together with the Central Organization of the Ministry of Justice in order to realize these aims. This presents strong medium-term opportunities for U.S. IT firms, however European competition will be stiff.

UYAP is a relatively new project and is in progress, providing many opportunities for those companies with specific solutions for such large enterprise systems. The project includes video & audio recording, and video conferencing systems in criminal courts, e-signature, and e-litigation solutions as well as SMS integrated information inquisition systems.

Along with UYAP, and the NPAA, Turkish authorities have been investing in digital investigation, surveillance, and forensics laboratories. These laboratories carry voice biometrics, Automated Finger Identification Systems (AFIS), data recovery, video processing, critical infrastructure protection, document examination, lawful interception, cryptology, intelligence, threat assessment, intelligence support systems, network intelligence, cyber crime investigations, anti-money laundering, national security solutions and more. Providing these technologies, as well as training operating personnel, create a promising market for U.S technology providers. This year the Turkish National Police together with the Istanbul

Governorship announced plans to invest approximately 10 million USD into building an accredited laboratory in Istanbul, which will also dedicate itself to training regional police forces in the CIS and the Middle East. Although not officially confirmed, approximately 60 million USD is expected to be invested in Ankara in a similar project by the Turkish National Police. It is important to mention that Hacettepe University in Ankara, one of the most prominent state universities in Turkey, has just made the necessary investment to form a research and development facility for digital forensic sciences. Given that there are 15 major cities in which the national police has established crime laboratories, it is expected that the government spending on digital IT investigations will increase.

Due to Turkey's position as a founding NATO member, Turkey has been a trusted partner in implementing and manufacturing information security solutions. The Turkish government financed 'Tubitak UEKAE – The Turkish Institute of Electronics and Cryptology' - perhaps the best example of one of the top manufacturers of cryptology devices used by NATO members. Tubitak works closely with U.S. companies and is a prime customer of such technologies enjoying strong partnerships with international firms.

Another such institution is the Turkish International Cooperation and Development Agency (TIKA), an organization used by the Turkish Government to share know-how and technologies in the region. TIKA is the Turkish Government's technical assistance agency. TIKA has coordination offices in 20 countries and operates across Africa, Asia and Europe, delivering development assistance to partner countries through its projects and activities.'

Turkey continues to play a crucial role in the region on cyber security. For example, Turkey has been very active in the implementation of a Cyber Crimes Unit within the Turkish National Police and has also been an example in the region by pushing for a Cyber Crimes Law, which awaits for approval at the Turkish Parliament.

Authorities in digital investigations, and forensic sciences as well as training partners for CIS and Middle Eastern authorities include the Gendarmerie Criminal Department governed by the Ministry of Defense, the Council of Forensic Sciences governed by the Department of Justice of Turkey, and National Police Criminal Laboratories governed by the Interior Ministry, all of which are members of the European Network of Forensic Science Institutes (ENFSI), and are accredited internationally. In short Turkey represents an excellent platform for U.S. IT Security firms to expand to other markets in the region.

Recent regulations from the Turkish Government include law 5651 (currently in the Parliament awaiting acceptance) which designs a concrete framework of regulations

regarding evidence gathering and convicting cyber-criminals. According to government sources, the law seeks to protect personal and corporate data against unlawful collection, usage and sharing of sensitive data. The Turkish National Police Cyber Crimes Unit based in Ankara is the main unit responsible for protecting citizens and corporations and implementing the law in cyber crimes.

Turkey is expected to move to internet protocol technologies to better gather evidence and convict criminals. The technology will need to upgrade from IPv4 to IPv6 and solutions relating to this upgrade will be required by the Turkish Government.

Best Prospects In IT Security

- Enterprise Resource Planning software with embedded security applications.
- Testing software and hardware. Virtual attack testing software and hardware is required by companies to simulate live attacks to better train and equip themselves in case of attacks. Also, system testers are needed to assess capacity and quality control of the integral IT system.
- Training for employees to better understand attacks and threats and what can be done to avoid system weaknesses. Synergy training to create defense shields consisting of technology-human actions-training are required in the industry.
- Monitoring software and hardware. In order to stop sensitive information leakage and to be able to collect evidence for court cases, monitoring software and hardware are in demand.
- Encrypted data storage and back-up systems. Correct data storage and back-ups are an integral part of IT security and mission critical applications.

Barriers

The CE mark is an issue for American firms who have not invested in this important compliance requirement. Since Turkey has adapted full acceptance of the regulations due to its European Union Customs Union membership, IT products need to meet the European Union directives on low voltage and electromagnetic compatibility. IT products need a CE mark to be imported into Turkey. The European Union (EU) Waste from Electrical and Electronic Equipment Directive (WEEE) and Restriction of Hazardous Substances Directive (RoHS), is also an issue.

Apart from electro-mechanical standards, IT producers must ensure that all electronics be compatible with the radio-frequency levels of the Turkish national standards on frequencies. Products manufactured prior to 1 January 2000 cannot be imported. The regulation from 1999 not allowing the importation of second hand IT products stands today. Used IT

equipment is not allowed into Turkey 'unless the IT equipment is an integral part of a manufacturing machine' (for example the computer attached to an used embroidery machine is allowed).

U.S. ITC hardware and software manufacturers will find that due to time commitment, cost, and complexity of the regulatory and commercial environment, it is essential to have local representation.

Although many people in larger urban commercial centers understand English, this may be a serious barrier in rural areas. It is therefore imperative that marketing information and user guides be written to the consumers' own language. Language barriers do pose a challenge for U.S. companies, hence a Turkish partner, distributor and/or agent is strongly advised. U.S. partners and products perceived well and favorably amongst business circles and consumers. To win over the local customer, a Turkish language web site would be extremely useful. Having a local representative or partner could help in translating your advertising so as to catch the eye and interest of the Turkish consumer.

For companies seeking to gauge market receptivity, exhibitions and conferences are excellent product launch vehicles. Reconfiguring the user interface and software would not be necessary in initial market fact finding stages and once market interest is determined and confirmed, the U.S. company and its local partner can look at packaging the hardware and software to meet the needs of the Turkish consumer.

Software translations may not be needed for professionals; however translations for software products for the general consumer are necessary. Recent Turkish regulations state that Turkish manuals and Turkish labeling on products should be inserted into product packaging hence arriving 'ready to sell' at Turkish customs. Previously the importer or the distributor would add these manuals and labels to the products after shipment was received and cleared through customs.

Market Opportunity Events:

EMEA Intelligence, Istanbul (www.emeaintelligence.com)

Turkey continues to act as the regional meeting point for information technology based security, intelligence, and surveillance providers and technologies. A key business development event is 'EMEA Intelligence: International Intelligence & Surveillance Technologies Conference and Exhibition' which will take place in Istanbul. EMEA Intelligence 2011 was an officially certified US Department of Commerce trade event and the

same certification is expected to be given for 2012. EMEA Intelligence is currently the only US Department of Commerce certified trade event in Turkey.

The same company previously organized a similar successful event with a focus on forensic sciences. Facts: Fifty-eight international companies, 79 international speakers, over 1000 professional visitors and government agencies from 20 countries, including USA, UK, Russia, Israel, Eastern Europe, Turkey, CIS Countries, Middle East Countries and more will attend.

Cebit Bilisim Eurasia, Istanbul (www.cebitbilisim.com)

The leading ICT industry exhibition in Eurasia gathering local and international companies, governmental bodies, NGO's and academicians.

An ideal platform for information sharing with forums & summit topics covering the full spectrum of business technologies, and making business with special delegation programs and matchmaking activities. Facts for last year's event: 22 countries represented, 67,000 professional visitors, 985 exhibitors.

Sources of Information:

Turkish Ministry of Transportation www.ubak.gov.tr

Turkish Ministry of Industry and Trade www.sanayi.gov.tr

Turk Card www.turkcards.com

Ongur Law www.arzuongurergan.av.tr/en-EN/index.html
(www.buyusa.gov/turkey/en/business_service_providers.html?bsp_cat=80120000&bsp_id=150)

Zaman Newspaper <http://www.zaman.com.tr>

Turkish Prime Ministry <http://rega.basbakanlik.gov.tr>

Turkish International Development and Cooperation Organization www.tika.gov.tr

Emea Intelligence Trade Event www.emeaintelligence.com

Cebit Bilisim Eurasia, Istanbul, Turkey.
IT and Telecom solutions trade fair.
Details: www.cebitbilisim.com

EMEA Intelligence, Istanbul, Turkey
Cyber Security solutions, trade event and seminar
Details: www.emeaintelligence.com

Interpro Medya
<http://www.interpromedya.com.tr/en/index.htm>

TUBISAD (Informatics Association)
<http://www.tubisad.org.tr/eng/Pages/default.aspx>

For More Information

The U.S. Commercial Service in Turkey offers a range of business development services to support U.S. sales into the Turkish market. Commercial Specialist and Trade Advisor Ihsan Muderrisoglu, also author of this brief, can be contacted at Ihsan.Muderrisoglu@trade.gov or phone: +90 (312) 457 7167, fax: +90 312 457-7302. For more information on our services, visit our website: www.buyusa.gov/turkey/en .

The U.S. Commercial Service — Your Global Business Partner

With its network of offices across the United States and in more than 80 countries, the U.S. Commercial Service of the U.S. Department of Commerce utilizes its global presence and international marketing expertise to help U.S. companies sell their products and services worldwide. Locate the U.S. Commercial Service trade specialist in the U.S. nearest you by visiting <http://www.export.gov/>.

Disclaimer: The information provided in this report is intended to be of assistance to U.S. exporters. While we make every effort to ensure its accuracy, neither the United States government nor any of its employees make any representation as to the accuracy or completeness of information in this or any other United States government document. Readers are advised to independently verify any information prior to reliance thereon. The information provided in this report does not constitute legal advice.

International copyright, U.S. Department of Commerce, 2011. All rights reserved outside of the United States.