REPUBLIC OF TÜRKİYE
MINISTRY OF INDUSTRY
AND TECHNOLOGY

#LOCAL DEVELOPMENT MOVE

ANKARA
KALKINMA AJANSI

ANKARA PROVINCIAL INVESTMENT AND PROMOTİON STRATEGY 2025-2028

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA

LOGISTICS AND INTERNATIONAL CONNECTIVITY

DEFENSE, SPACE, AND DUAL-USE TECHNOLOGIES

HUMAN CAPITAL AND SOCIAL DEVELOPMENT

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS

HEALTH AND LIFE SCIENCES ECOSYSTEM

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ANKARA
KALKINMA AJANSI

Ankara

Provincial Investment and Promotion Strategy

2025-2028

2025

SEPTEMBER

Ankara Development Agency

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ABBREVIATIONS

EU	:	European Union
AFAD	:	Disaster and Emergency Management Authority
ANKAMOB	:	Ankara Furniture Makers and Lacquerers Chamber of Tradesmen and Craftsmen
ASELSAN	:	Military Electronics Industry Inc.
ASKI	:	Ankara Water and Sewerage Administration General Directorate
ASO	:	Ankara Chamber of Industry
ATB	:	Ankara Commodity Exchange
ATO	:	Ankara Chamber of Commerce
BTK	:	Information and Communication Technologies Authority
ÇŞB	:	Ministry of Environment, Urbanization and Climate Change
DEİK	:	Foreign Economic Relations Board
DHMİ	:	State Airports Authority
DKMP	:	General Directorate of Nature Conservation and National Parks
DMO	:	State Supply Office
DSİ	:	General Directorate of State Hydraulic Works
WIR	:	World Investment Report
EPDK	:	Energy Market Regulatory Authority
GSB	:	Ministry of Youth and Sports
GDP	:	Gross Domestic Product
HAVELSAN	:	Air Electronics Industry Inc.
HPC	:	High-Performance Computing
İŞKUR	:	Turkish Employment Agency
İLBANK	:	Bank of Provinces Inc.
KKM	:	FX-Protected Deposit Scheme
SME	:	Small and Medium-Sized Enterprise
KOSGEB	:	Small and Medium Enterprises Development Organization
KTB	:	Ministry of Culture and Tourism
KVMGM	:	General Directorate of Cultural Heritage and Museums
MAKFED	:	Machinery Federation
MEB	:	Ministry of National Education
MGM	:	General Directorate of Meteorology
MICE	:	Meetings, Incentives, Conferences, and Exhibitions
NDC	:	Nationally Determined Contribution
OECD	:	Organisation for Economic Co-operation and Development
OGM	:	General Directorate of Forestry
OIZ	:	Organized Industrial Zones
OSBÜK	:	Supreme Organization of Organized Industrial Zones
OSSA	:	OSTIM Defense and Aviation Cluster
ROKETSAN	:	Rocket Industry and Trade Inc.

SASAD	:	Defense and Aerospace Industry Manufacturers Association
SGK	:	Social Security Institution
SHGM	:	Directorate General of Civil Aviation
CBAM	:	Carbon Border Adjustment Mechanism
SOME	:	Computer Security Incident Response Teams
SSB	:	Presidency of Defense Industries
STB	:	Ministry of Industry and Technology
STEM	:	Science, Technology, Engineering, and Mathematics
NGO	:	Non-Governmental Organizations
TBAA	:	Turkish Business Angels Association
TCDD	:	Turkish State Railways
TEİAŞ	:	Turkish Electricity Transmission Corporation
TESK	:	Confederation of Turkish Tradesmen and Craftsmen
TDT	:	Organization of Turkic States
TGA	:	Türkiye Tourism Promotion and Development Agency
TİM	:	Turkish Exporters Assembly
TİTCK	:	Turkish Medicines and Medical Devices Agency
TOBB	:	Union of Chambers and Commodity Exchanges of Türkiye
TOKİ	:	Housing Development Administration of Türkiye
TRUBA	:	Turkish National Science e-Infrastructure
TSE	:	Turkish Standards Institution
TTO	:	Technology Transfer Offices
TURSAB	:	Association of Turkish Travel Agencies
TUSAŞ	:	Turkish Aerospace Industries Inc.
TÜBİSAD	:	Informatics Industry Association
TÜBİTAK	:	Scientific and Technological Research Council of Türkiye
TÜİK	:	Turkish Statistical Institute
TÜRKAK	:	Turkish Accreditation Agency
TÜRKPATENT	:	Turkish Patent and Trademark Office
UAB	:	Ministry of Transport and Infrastructure
FDI	:	Foreign Direct Investment
UKOME	:	Transportation Coordination Center
UNCTAD	:	United Nations Conference on Trade and Development
YASED	:	International Investors Association
YÖK	:	Council of Higher Education
YHT	:	High-Speed Train

EXECUTIVE SUMMARY

This report has been prepared as the outcome of a comprehensive process conducted under the coordination of the Ankara Development Agency, with the aim of advancing Ankara's investment and promotion capacity. The principal goal of the study is to identify strategic approaches that will enhance the attractiveness of the Province of Ankara for investment at both national and international levels, to analyze the current situation by revealing stakeholder expectations, and to develop a feasible and implementable roadmap for the province. The structure of the report comprises an assessment of alignment with upper- level policy documents, the compilation of field findings, the identification of strategic focus areas, the formulation of a roadmap within a goals – targets – actions framework, and the design of monitoring–evaluation and risk management mechanisms.

A broad group of stakeholders, encompassing public institutions, the private sector, professional organizations, and civil society organizations, was involved in the process. Within this scope, 54 stakeholders contributed through surveys, and a participant profile predominantly consisting of senior executives and business owners provided substantive input to the clarification of strategic priorities.

In addition, the outputs of direct interviews as well as panels and workshops organized by the Agency were integrated into the process. Multi-stakeholder feedback was classified under thematic headings, and policy needs were thereby clearly identified. The consultation process was conducted with the participation of 26 institutions/organizations and 30 firms, and the findings obtained were directly reflected in the set of strategic priorities. Due regard was given to ensuring the alignment of the strategy with national policy documents.

As a result of the strategy preparation process, a long-term vision has been articulated for Ankara. The vision has been defined as follows:

"Ankara, the global capital of investment and innovation, distinguished by its high quality of life and its sustainable and innovative structure."

In order to realize the identified vision, the strategy has been structured around a series of focus areas that will position Ankara more prominently in the period ahead. These focus areas, which aim to reinforce the city's strengths, transform areas requiring development, and enhance its competitiveness at the international level, are set out below:

- A Livable, Sustainable, and Global Capital City – Ankara
- Defense, Space, and Dual-Use Technologies
- Digitalization, Innovation, and High-Technology-Based Competitiveness
- Logistics and International Connectivity
- Human Capital and Social Development
- Health and Life Sciences Ecosystem

The current situation analyses have identified Ankara's higher education and research and development capacity as a primary determining factor. The presence of a large number of universities, research institutes, and technoparks provides a comprehensive infrastructure that supports researcher employment, patenting and registration dynamics, and technology entrepreneurship.

The supply chain that has matured around the defense and aerospace industries serves as a strategic lever for the transfer of dual-use technologies into civilian applications, as well as for the deepening of advanced materials, electronics, and software ecosystems. In the fields of health and life sciences, clinical research capacity, clusters focused on medical devices and biotechnology, and university–hospital–industry cooperation models stand out as key strengths.

The city's level of digital transformation points to a strengthened production and service infrastructure driven by applications in artificial intelligence, data analytics, cybersecurity, and automation. These

capability components are regarded as fundamental areas of advantage with respect to high value-added production, qualified employment, and enhanced international competitiveness.

Within the framework of the Ankara Provincial Investment and Promotion Strategy, the planned actions have been structured around a total of 24 objectives under the six identified focus areas. In line with these objectives, 68 targets have been defined, and 243 implementable and monitorable actions have been planned in order to achieve the specified targets.

The planned actions aim to deliver tangible contributions to the city by taking into account Ankara's strengths and areas with potential for further development across different domains. Within the scope of urban infrastructure and environmental sustainability, the integration of metro and suburban rail lines with organized industrial zones, the expansion of intelligent transport systems, investments in green corridors, and the deployment of smart lighting and energy efficiency applications have been envisaged. Through these measures, it is anticipated that Ankara's overall accessibility will be enhanced, while the city will be positioned as an urban center with a high level of climate resilience

In the field of defense and aerospace industries, the integration of SMEs into supply chains, the strengthening of certification and quality infrastructures, the development of international joint research and development projects, and the transfer of dual-use technologies to civilian sectors such as health, agriculture, and energy have been identified as key objectives. Through these actions, Ankara is expected to emerge not only as a center contributing to national security, but also as an ecosystem generating multi-sectoral technological solutions.

Within the focus on digitalization and high technology, the establishment of the "Ankara Technology Hub," the support of investments in advanced materials and microchips, the development of research and development as well as design centers, and the organization of entrepreneurship hubs and international innovation summits have been planned. Furthermore, through the establishment of twin transition centers in industry, the measurement and reporting of carbon footprints, and the wider deployment of artificial intelligence and Internet of Things applications, the alignment of Ankara's industrial base with international standards will be strengthened.

Within the framework of logistics and international accessibility, it is envisaged to launch new direct international flights from Esenboğa Airport, complete the metro line connecting the airport to the city center, establish logistics free zones, invest in dry ports and intermodal hubs, and develop micro-logistics centers. Through these initiatives, Ankara is expected to become a more visible actor within global supply chains, while ensuring improved accessibility and attractiveness for investors.

In the field of human resources and social development, the strategy aims to establish sector-specific vocational high schools and skills academies within organized industrial zones (OIZs), implement accelerated skills development programs, introduce targeted incentives to promote employment for women and young people, and expand the use of agricultural technologies in rural areas. In this way, Ankara will build a strong workforce ecosystem not only in terms of technical capabilities but also with regard to social inclusion and equal opportunity.

With a focus on health and life sciences, the strategy envisages the implementation of localization programs in pharmaceutical and medical device manufacturing, the establishment of testing and certification centers, the promotion of biotechnology and artificial intelligence-based health technologies, the diversification of health tourism investments, and the creation of a "Health Valley." These initiatives aim to position Ankara as a health and life sciences hub not only at the national level but also on a regional scale.

This strategic framework has been designed to accelerate Ankara's transformation both economically and socially. The proposed actions will enhance the city's attractiveness for global investors, increase high- technology production and exports, foster a qualified workforce, open new markets in health and life sciences, and ultimately improve overall quality of life.

1. METHODOLOGY OF THE STUDY

1.1. Purpose and Scope of the Report

The purpose of this study is to define Ankara's investment and promotion priorities, needs, and potentials, and to set out, on a collaborative basis, a strategic roadmap and policy framework for the 2025–2028 period that will support sustainable development.

The scope of the study comprises an in-depth analysis of Ankara's current situation based on socio-economic indicators, labor market data, economic structure, competitiveness, industrial and commercial infrastructure, international investment trends, and foreign trade indicators. It further includes an assessment of the economic profiles and leading sectors of the districts, the identification of bottlenecks and problem areas encountered throughout the investment process and the definition of improvement-oriented measures, as well as a review of relevant national policy documents and the Ankara Regional Plan (2024–2028), alongside an evaluation of priority and leading sectors.

The main outputs of the study include the formulation of a shared vision; the identification of strategic focus areas, objectives, targets, and actions; the determination of cooperating institutions and organizations and an associated implementation timetable; the conduct of a SWOT analysis; the organization of stakeholder consultations and surveys; the preparation of the overall strategy; and the establishment of a monitoring and evaluation mechanism to ensure effective implementation and sustainability of the strategy.

1.2. Methodology of the Study

Preparatory Phase and Definition of the Framework

The preparation process of the Ankara Investment and Promotion Strategy was initiated with a comprehensive preparatory phase and the establishment of a clear analytical and methodological framework. At the outset, coordination meetings were held with the Ankara Development Agency project team, during which the objectives of the strategy, its thematic scope, and the overall methodological approach were clearly defined. The study is grounded in an integrated framework that aims not only to improve the investment environment, but also to strengthen Ankara's promotion and positioning capacity at both national and international levels.

During the preparatory phase, key policy documents and strategic plans that directly influence Ankara's economic, social, and spatial structure were examined in detail. In this context, upper-level policy documents—such as the Twelfth Development Plan, the Medium-Term Program, the Industry and Technology Strategy, the EU Digital Decade Strategy, and Turkey's International Direct Investment Strategy—were analyzed alongside relevant local-level plans and programs, and systematically aligned with Ankara's investment and promotion strategy.

In addition, national and international reports reflecting sectoral developments, academic studies, assessments published by chambers of industry and commerce, and statistical datasets related to the investment climate were reviewed. The findings derived from this review constituted the foundation of the methodological design. Through this process, preliminary insights into Ankara's current economic indicators, competitiveness capacity, spatial development dynamics, and global positioning were consolidated, and a robust reference framework was established to guide subsequent field studies and analytical phases.

Data Collection and Current Situation Analysis

In order to ensure that the strategy is grounded in a robust and reliable evidence base, comprehensive data collection activities were carried out using both secondary and primary sources. Within the scope of secondary data collection, statistical data published by the Turkish Statistical Institute (TurkStat), the Social Security Institution (SGK), the Central Organization of Organized Industrial Zones (OSBÜK), the

Ministry of Industry and Technology, the Ministry of Trade, and other relevant public institutions were systematically reviewed. Based on these datasets, analyses were conducted on Ankara's sectoral production capacity, employment structure, foreign trade trends, and spatial distribution.

As part of the current situation analysis, sectors were examined in detail using the NACE Rev.2 classification. The distribution of insured employees across sectors, the number of establishments, export and import performance, and levels of sectoral specialization at the provincial level were carefully assessed. In addition, global value chain trends, indicators of digital transformation, and developments in defence and high-technology industries were analysed with a specific focus on Ankara, enabling the identification of the city's competitive advantages as well as potential areas for structural transformation.

Furthermore, findings obtained from national and international literature were taken into consideration. Reports published by the World Bank, the OECD, the European Commission, and international investment organizations were reviewed in order to better understand Ankara's positioning within the global context. The data obtained were used both to present a comprehensive snapshot of the existing structure and to provide a sound methodological basis for stakeholder consultations and survey activities to be conducted in subsequent phases of the study.

Participatory Processes: Stakeholder Consultations and Survey Studies

A participatory approach constituted a core principle in the preparation of the Ankara Provincial Investment and Promotion Strategy, and the views and contributions of diverse stakeholder groups were incorporated throughout all stages of the process. In order to ensure broad-based participation, both qualitative and quantitative methods were employed; semi-structured interviews, outputs from previously conducted workshops and panels, and survey studies were jointly assessed.

Direct engagement was established with institutions operating in Ankara, technoparks, organized industrial zones, business representatives, civil society organizations, and professional chambers. While some institutions preferred face-to-face meetings, others opted for online meetings or participation through survey questionnaires. Within the scope of the study, face-to-face consultations were conducted with 26 institutions and organizations, during which Ankara's investment climate was assessed in terms of its strengths and weaknesses, strategic opportunities, and structural challenges. In addition, views were collected from 30 firms operating across different sectors. These consultations not only provided insights into the current situation, but also identified priority needs and potential avenues for institutional cooperation that are critical for the practical implementation of the strategy.

Findings derived from panels and workshops organized by, or contributed to by, the Ankara Development Agency during the reporting process were also integrated into the report. The views expressed in these events were thematically categorized, enabling the clarification of common trends and policy needs.

Online survey studies represented another key component of the participatory process. Survey questionnaires were designed to measure perceptions and expectations regarding Ankara's investment and promotion capacity, and systematically captured participants' assessments of the province's strengths, areas for development, promotion priorities, and strategic expectations. During the design phase, national and international good practices were reviewed, and particular care was taken to ensure that the questions were formulated in a clear and concise manner. As a result of the online implementation of the survey, responses were received from 54 participants, reflecting a broad spectrum of stakeholders, including public institutions, private sector representatives, professional organizations, and civil society organizations.

The findings obtained from the surveys were integrated with the outcomes of face-to-face consultations and other participatory activities and were utilized in the identification of strategic priorities. In this way,

the Ankara Provincial Investment and Promotion Strategy was built not only upon an assessment of the existing conditions, but also upon the shared vision and expectations of local stakeholders.

Formulation of the Strategic Framework and Preparation of the Roadmap

The final stage of the methodological process focused on synthesizing the findings obtained through various data collection tools in order to establish a coherent strategic framework and translate it into an implementable roadmap. In this context, statistics derived from desk-based analyses, trends identified during stakeholder consultations, and the results of survey studies were jointly assessed, enabling the identification of the core priorities shaping Ankara's investment climate and promotion capacity.

In constructing the strategic framework, analytical approaches were employed to systematically assess Ankara's strengths and weaknesses, as well as its opportunities and threats. The defined focus areas facilitated the articulation of strategic objectives that concretize the overarching vision, while specific targets and corresponding activities were structured under each objective.

The roadmap was designed to ensure the practical feasibility of this objectives–targets–activities framework. For each activity, responsible institutions and organizations, cooperation mechanisms, and implementation timelines were clearly defined. This approach ensured that the strategy evolved beyond a purely directional document into one with a strong operational character.

To complete the process, a monitoring and evaluation approach was developed, defining mechanisms that enable the regular tracking of strategic objectives and targets through performance indicators. In this way, the Ankara Provincial Investment and Promotion Strategy has been endowed with an institutional basis for sustainability, not only in terms of its preparation process, but also through its implementation and monitoring dimensions.

2. CURRENT SITUATION ANALYSIS

2.1. Analysis of Higher-Level Policy Documents

Within the scope of this study, the compatibility of the Ankara Provincial Investment and Promotion Strategy with national, regional, and sectoral policy documents was evaluated. Relevant strategy documents and development plans were examined; priorities, goals, and actions included in their content were reviewed to identify topics directly related to Ankara's investment and promotion strategy. Thus, the aim was to position the strategy not only as a roadmap specific to the city, but also as a model that is consistent with national development goals and contributes to their implementation. The documents reviewed are as follows:

- European Digital Decade Policy Program 2030
- Twelfth Development Plan (2024–2028)
- Medium-Term Program (2025–2027)
- Turkey's International Direct Investment Strategy (2024–2028)
- National Smart Cities Strategy and Action Plan (2024–2030)
- National Cyber Security Strategy and Action Plan (2024–2028)
- National Rural Development Strategy IV (2024–2028)
- Industry and Technology Strategy 2030
- Green Deal Action Plan
- Climate Change Mitigation Strategy and Action Plan (2024–2030)
- Women's Empowerment Strategy Document and Action Plan (2024–2028)
- National Regional Development Strategy (2024–2028)
- Ankara Regional Plan (2024–2028)

European Digital Decade Policy Program 2030[1]

The Digital Decade Policy Program, developed by the European Commission, sets out the fundamental strategic framework guiding the European Union's digital transformation. The document clearly defines the four main goals ("cardinal points") that will guide the European Union's digital transformation until 2030:

- Digital Skills
- Digital Infrastructures
- Business Digital Transformation
- Digitalization of Public Services (Government)

To achieve these goals, the EU envisages a monitoring and follow-up mechanism based on DESI (Digital Economy and Society Index) and annual reports. Strategic roadmaps are being prepared in cooperation with member states, and support is provided through multinational projects where necessary.

The European Digital Decade Policy Program 2030 goals can be summarized as follows:

a) Digital Skills

- A target of 20 million ICT specialists and gender convergence
- The goal is for at least 80% of the population to have basic digital skills

b) Digital Infrastructure

- Gigabit access and 5G coverage (for everyone) should be provided

[1] https://commission.europa.eu/europes-digital-decade-digital-targets-2030-documents_en

- The EU's share of global semiconductor production should be doubled
- The goal is to establish 10,000 climate-neutral and secure edge nodes.
- The development of the first quantum-accelerated computer is targeted

c) Digital Transformation of Businesses

- 75% of companies are expected to use cloud, artificial intelligence, or big data technologies
- The number of unicorns is targeted to double
- The goal is for at least 90% of SMEs to achieve basic digital intensity

d) Digitalization of Public Services

- 100% online accessibility of basic public services is planned
- All citizens should be able to access their e-Health records (100%) online
- The goal is to make the digital identity (e-ID) solution 100% accessible

Multinational projects are supported under the program; the development of data infrastructures, low-energy processors, 5G communication systems, high-performance computing capacities, secure quantum communication, digitalization of public services, blockchain applications, digital innovation centers, digital skills development activities, and cybersecurity investments are prominent. The program aims to strengthen the EU's digital capacity on a global scale by bringing together public and private sector investments under a common vision. From Ankara's perspective, all of these areas constitute important reference points for regional investment and promotion strategies. In particular, projects focused on 5G infrastructure, high-capacity computing, and cybersecurity strengthen the capital's potential to become a digital economy hub.

The Digital Rights and Principles Declaration set forth by the program is based on the principle that digital transformation should be pursued within a framework grounded in human rights, security, participation, and sustainability. The Declaration prioritizes the protection of individuals in the digital environment, enabling them to make informed choices and have full control over their data. For Ankara, this approach is a guiding set of principles for building a transparent, reliable, and people-centered digital ecosystem in the investment environment. The approach presented strengthens the climate of trust, particularly for international investors, and increases interest in the city's digitalization process.

In terms of education, the Digital Education Action Plan, developed in line with the program's strategic goals, is noteworthy. The plan focuses on increasing teachers' digital literacy, integrating artificial intelligence-based educational content into the teaching process, providing digital equipment support to educational institutions, and systematically evaluating students' digital skills. Furthermore, it aims to strengthen the education ecosystem through structures such as European Digital Education Hubs. For Ankara, this approach lays the groundwork for expanding the digital skills ecosystem in collaboration with universities and research centers, directly contributing to the development of a technology-focused workforce.

The goals of the European Digital Decade Policy Program offer multidimensional opportunities for Ankara's investment and promotion strategy. The city's strong academic infrastructure, dense presence of public institutions, and developing entrepreneurial ecosystem have the potential to initiate a transformation process aligned with EU goals across numerous areas, from digital skills to infrastructure, SME transformation, and the digitization of public services. Developing action plans aligned with these goals will enhance Ankara's competitiveness at the national level and contribute to its appeal as a hub for international investment.

Twelfth Development Plan (2024–2028)[2]

The Twelfth Development Plan (2024-2028) sets out its vision as "a Turkey that is environmentally conscious, resilient to disasters, increases added value through high-tech production, ensures fairness in income distribution, and is stable, strong, and has a high level of prosperity in the Turkish Century."

The plan's goals and policies are grouped under five main axes:

- Stable Growth and Strong Economy
- Competitive Production Through Green and Digital Transformation
- Qualified People, Strong Families, and Healthy Society
- Disaster-Resilient Settlements and Sustainable Environment
- Justice-Based Democratic and Effective Governance

The Ankara Provincial Investment and Promotion Strategy intersects with the goals outlined in the Twelfth Development Plan (2024-2028) in multiple dimensions, making significant contributions at the implementation level.

In terms of the economy, the plan sets out a vision of "stable, export-based growth, with the industrial sector playing a leading role by increasing its interaction with the agriculture and services sectors." This approach is directly linked to Ankara's strong production infrastructure, industrial zones, technology parks, and university-industry cooperation mechanisms. Clustering efforts carried out within the scope of the investment and promotion strategy, initiatives aimed at increasing export capacity, and activities aimed at attracting foreign capital provide concrete support for the plan's policies of "developing investment, production, and trade infrastructures in a way that contributes to competitiveness with a focus on green and digital transformation." Ankara is becoming one of the areas of application for the economic transformation envisaged in the development plan by encouraging high value-added investments, particularly in strategic areas such as the defense industry, information technology, health technologies, and advanced manufacturing.

In the context of green and digital transformation, the plan emphasizes the importance of "digitalization and green transformation-focused policies." Ankara's investment and promotion strategy, within this framework, demonstrates an orientation consistent with renewable energy projects, infrastructure investments aimed at energy efficiency, smart city applications, digital service platforms, and advanced technology-based entrepreneurial activities. In particular, "supporting technology and infrastructure investments in the energy, manufacturing, transportation, and agriculture sectors in line with the 2053 net zero emissions targets" is supported through planned green Organized Industrial Zones (OIZ) initiatives, clean production technologies, and digital innovation centers in Ankara. The city's potential to attract international technology investments stands out as a factor that will contribute to accelerating this transformation.

The human resources-focused plan aims to "enhance the quality of individuals by increasing their knowledge and skills, protect and strengthen families, ensure that no one is left behind, promote the fair distribution of prosperity, and establish a peaceful and healthy social structure characterized by unity, solidarity, and cooperation." In this regard, Ankara plays an important role in training qualified human resources thanks to its strong university ecosystem, R&D centers, technoparks, and educational infrastructure. Accelerated skills programs developed under the strategy, support measures encouraging women and youth entrepreneurship, and training activities that make the workforce compatible with digitalization support the plan's priority of "integrating the workforce through vocational

[2] https://www.sbb.gov.tr/wp-content/uploads/2023/12/On-Ikinci-Kalkinma-Plani_2024-2028_11122023.pdf

training and higher education." Furthermore, investments in health and life sciences contribute to raising the quality of life in society and fostering healthy and productive individuals.

The plan's goal of "creating climate change and disaster-resilient, high-quality-of-life, green, and digital technology-based smart, safe, sustainable cities and settlements " in environmental and spatial terms directly aligns with Ankara's urban vision. Urban transformation projects, smart transportation systems, low-carbon investments, and disaster-resilient infrastructure applications both improve quality of life and ensure environmental sustainability. The strategy's priorities in this direction contribute to Ankara's development as a sustainable city model not only economically but also environmentally and socially.

In terms of governance, the plan's goals of "effectively implementing the principles of democracy and good governance in a state governed by an independent, impartial, and transparent judicial system" and "providing public services in a participatory, accountable, transparent, fair, and fast" manner" are consistent with the stakeholder-based and participatory approach of the Ankara Provincial Investment and Promotion Strategy. The stakeholder consultations, survey studies, and institutional collaborations conducted during the strategy's preparation process ensure the concrete implementation of the participatory governance model envisaged by the plan at the local level. Open data-based analyses, regular reporting, and accountability mechanisms bring the city's investment environment into line with international standards.

These five main axes outlined in the Twelfth Development Plan form a framework to which the Ankara Provincial Investment and Promotion Strategy contributes directly in terms of both content and implementation. The strategy provides concrete support for achieving the goals set out in the development plan by mobilizing the city's strong academic infrastructure, industrial and service potential, entrepreneurial ecosystem, and governance capacity. Thus, Ankara plays a leading role in realizing the national development vision and strengthens its position as a competitive and sustainable investment center on an international scale.

Medium-Term Program (2025-2027)[3]

The Medium-Term Program (2025-2027) is a fundamental policy document that sets macroeconomic targets in light of global and national economic developments and aims to increase predictability for the public and private sectors. The program sets out the goals of "reducing inflation to single digits to ensure sustainable growth and increasing production and employment based on productivity through structural reforms." The program contributes to the achievement of the goals set at the national level by supporting the priorities of the Ankara Provincial Investment and Promotion Strategy with concrete projects and investment areas.

The OVP envisages "the consistent implementation of monetary, fiscal, and revenue policies that support each other" to strengthen macroeconomic stability and ensure price stability. The strategy prepared for Ankara is in line with this goal through initiatives that increase predictability in the investment environment, strengthen investor confidence, and enhance the ease of doing business. The promotion mechanisms developed to attract foreign investors and encourage local entrepreneurs support the program's emphasis on improving the business and investment environment.

The program also includes "ensuring technological transformation towards a green and digital economy" and transforming the production structure in this direction as key policy areas. The Ankara Investment and Promotion Strategy constitutes one of the concrete application areas of this transformation by prioritizing green industrial zones, digital innovation centers, renewable energy projects, and 5G/digital infrastructure investments. Furthermore, the OVP's goal of "increasing green, digital, and supply chain-

[3] https://www.sbb.gov.tr/wp-content/uploads/2024/09/Orta-Vadeli-Program_2025-2027.pdf

focused investments" is fully aligned with Ankara's project forecasts for industrial clusters and logistics centers.

In terms of labor force and human capital, the program envisions steps such as "updating vocational and technical education curricula in cooperation with the private sector, expanding internship and on-the-job training programs," and "training qualified labor force in strategic areas such as defense industry, artificial intelligence, cyber security, and clean energy" . Ankara, with its strong university infrastructure, technology parks, and leadership in the defense industry, is a critical center for achieving these goals. Within the scope of the strategy, university-industry cooperation, accelerated skills development programs, and support for women/young entrepreneurs are becoming fully aligned with the OVP's human resources policies.

Another element highlighted by the program is the "preparation of adaptation programs for the employment of groups facing difficulties in labor force participation" and the expansion of entrepreneurship support. The Ankara Investment and Promotion Strategy supports inclusive growth by creating new opportunities in the entrepreneurship ecosystem, especially for young people, women, and disadvantaged groups.

The OVP also states that regulations such as the "Green Transformation Support Program for sustainable production and low-carbon investments," the "National Green Taxonomy," and the "Green Finance Strategy" will be implemented. Ankara's strategy highlights sustainable financing instruments in investment promotion in line with these regulations and contributes to the program's priorities with projects focused on the circular economy and environmental sustainability.

The Ankara Provincial Investment and Promotion Strategy is directly related to the macroeconomic stability, green and digital transformation, human capital development, improvement of the investment environment, and inclusive growth targets outlined in the Medium-Term Program (MTP). The concretization and implementation of the goals set out in the program at the local level is possible by mobilizing Ankara's economic, social, and technological potential, which strengthens the city as a competitive and sustainable investment center at both the national and international levels.

Turkey's International Direct Investment Strategy (2024-2028)[4]

In the process of preparing the Ankara Provincial Investment and Promotion Strategy, the Turkey International Direct Investment Strategy (2024-2028) and the Action Plans (2024) for implementing this strategy provide a critical overarching policy framework. Both documents aim to attract high-quality international direct investment to the country in response to emerging trends in the global investment agenda, highlighting the role of cities in this process.

The 2024-2028 Turkey International Direct Investment Strategy defines eight different "Qualified FDI Profiles" that are consistent with these global trends and our country's fundamental policy documents. These profiles are as follows:

- Climate-Friendly Investments
- Digital Investments
- KTZ-Focused Investments
- Knowledge-Intensive Investments
- Qualified Employment-Generating Investments
- Value-Added Service Investments
- Qualified Financial Investments

[4] https://www.invest.gov.tr/tr/sayfalar/fdi-strategy.aspx

- Investments Supporting Regional Development

The strategy document sets a target for Turkey to increase its share of global direct investment to 1.5% and its share of regional investment to 12% by 2028. The eight qualified FDI profiles defined in line with the set target strongly align with Ankara's investment promotion priorities. Opportunities that stand out in areas such as defense industry, health technologies, software and information technology, advanced manufacturing, renewable energy, and logistics, particularly in the capital, are directly related to the investment profiles prioritized by the strategy.

Action plans define the tools that will enable these goals to be implemented in the field. For example, digitizing bureaucratic processes and developing investor-friendly practices as part of the competitive investment environment are among the steps that will increase Ankara's capacity to attract investors. Similarly, under the green transformation heading, renewable energy projects, circular economy practices, and the development of green financing tools are in line with the city's energy efficiency and sustainability-focused projects.

In the field of digital transformation, investments in emerging technology areas such as 5G, artificial intelligence, big data, and cybersecurity offer viable opportunities thanks to Ankara's existing technology parks and R&D infrastructure. In the context of global supply chains, strengthening the integration of local suppliers with international investors and developing logistics infrastructure investments will support the capital's role as a production and distribution center.

Actions targeting qualified human resources—cooperation between vocational education and industrial zones, increasing employment in STEM (science, technology, engineering, and mathematics) fields, attracting international talent to the country, and strengthening the employment of women and young people—are directly aligned with Ankara's potential in education, research, and its young population. The international campaigns, sectoral promotional events, and activities to be carried out under the "Invest in Türkiye" brand in the field of communication and promotion will create opportunities to increase the international visibility of the Ankara Investment and Promotion Strategy.

Turkey's International Direct Investment Strategy and Action Plans serve as direct guidelines for Ankara's Provincial Investment and Promotion Strategy. With its sectoral diversity, human resource capacity, strong infrastructure, and the presence of decision-making centers, the capital city is one of the most important cities that will contribute to the achievement of the goals defined in these high-level policy documents. Aligning Ankara's investment promotion vision with the policy areas defined in Turkey's FDI strategy will both increase the city's investment attraction capacity and make concrete contributions to the global competitiveness goals set at the national level.

National Smart Cities Strategy and Action Plan (2024-2030)[5]

The 2024-2030 National Smart Cities Strategy and Action Plan has built its scope of intervention on four strategic dimensions: Advanced Society, Advanced Technology, Sustainability, and Resilient World.

These axes frame the smart city transformation within a multidimensional framework that does not view it as limited to technological infrastructure investments, but simultaneously addresses the dimensions of social development, environmental sustainability, and resilience to shocks. The multidimensional vision outlined sets forth the fundamental policy axes guiding the future of cities. The goals defined within a broad framework, ranging from education to culture and from digital infrastructure to green transformation, bring together economic development, social justice, and environmental protection.

[5] https://www.akillisehirler.gov.tr/2024-2030-semasi/

The Ankara Provincial Investment and Promotion Strategy is also strongly aligned with this vision. The city's universities, technology parks, entrepreneurship networks, green OIZ projects, and disaster-resilient urban planning initiatives directly support the transformation areas envisaged by the strategy. Thus, Ankara is rising to become a model application center at both the national and international levels in the implementation of the smart city vision.

The strategy and strategic goals of the 2024–2030 National Smart Cities Strategy and Action Plan are as follows:

- **Strategic Goal 1: Local Adaptation, Development, and Well-being**
  - Strategic Target 1.1: Strengthening social participation and establishing governance
  - Strategic Target 1.2: Increasing smart city investments and incentives
- **Strategic Goal 2: Transformation and Livability**
  - Strategic Target 2.1: Widespread adoption of smart transportation systems
  - Strategic Target 2.2: Increasing energy efficiency and sustainable energy sources
- **Strategic Goal 3: Economic Growth and Employment**
  - Strategic Target 3.1: Supporting innovative entrepreneurship and job opportunities
  - Strategic Target 3.2: Increasing employment and strengthening vocational training
- **Strategic Goal I 4: Environment and Sustainable Development**
  - Strategic Target 4.1: Protecting natural resources and reducing environmental impacts
  - Strategic Target 4.2: Combating climate change and implementing adaptation strategies

The defined goals are also of critical importance for Ankara. Indeed, the goals defined under the Local Adaptation, Development, and Welfare axis directly align with Ankara's investment and promotion strategy. Stakeholder participation, social consultation processes, and open data-based governance practices carried out in the city contribute to strengthening social participation. Furthermore, the activation of investment incentives and the support of smart city projects enable Ankara to integrate into the national strategy with technology-based projects.

The goals under the heading of Transformation and Livability are closely related to Ankara's current projects in the areas of transportation and energy. With smart transportation systems, digital solutions that reduce traffic congestion, and micromobility applications, the capital contributes to national goals. Furthermore, energy efficiency-focused OIZ investments and sustainable energy projects such as solar and wind power ensure that Ankara supports these strategic goals.

In terms of Economic Growth and Employment, Ankara stands out with its entrepreneurial ecosystem, technology parks, and innovation centers. The strategy's vision of increasing innovative entrepreneurship and job opportunities is supported by incentives for Ankara's start-up ecosystem and programs aimed at attracting international investors. Furthermore, university-industry cooperation and vocational training programs directly contribute to improving the quality of the workforce and strengthening employment in the capital.

The Environment and Sustainable Development axis is directly related to Ankara's green transformation and sustainability-focused projects. Projects such as the protection of natural resources, waste management, and water efficiency serve to reduce environmental impacts. At the same time, low-carbon transportation projects, renewable energy investments, and disaster-resilient urban planning efforts carried out in Ankara within the scope of climate change mitigation and adaptation goals contribute to this dimension of the national strategy.

The Ankara Provincial Investment and Promotion Strategy is strongly aligned with the targets set by the National Smart Cities Strategy for the 2024–2030 period in the areas of participatory governance, smart transportation, energy efficiency, entrepreneurship, employment, environmental sustainability, and climate adaptation. With its infrastructure, academic capacity, and investment opportunities, Ankara has the potential to be not only a model city in the implementation of this strategy, but also a pioneering application center on a national scale.

National Cyber Security Strategy and Action Plan (2024-2028)[6]

The National Cybersecurity Strategy and Action Plan (2024–2028) is a comprehensive policy document that focuses on cybersecurity as an integral part of national security in line with the Turkey Century vision. The document is built on six strategic goals: increasing resilience in the face of increasingly complex cyber threats, developing proactive defense mechanisms, improving human resources and awareness levels, ensuring the secure use of new technologies, reducing external dependency through domestic and national solutions, and strengthening the Turkey brand internationally. Eighteen targets and 61 action items have been defined to achieve the identified goals. The strategic goals are as follows:

- Cyber Resilience
- Proactive Cyber Defense and Deterrence
- Human-Centered Cybersecurity Approach
- Safe Use of Technology and Its Contribution to Cybersecurity
- Domestic and National Technologies in Combating Cyber Threats
- Turkey's Brand in the International Arena

The Ankara Provincial Investment and Promotion Strategy interacts strongly with the aforementioned national strategy. With its dense concentration of public institutions, advanced technology clusters, defense industry infrastructure, universities, and research centers, Ankara directly contributes to the concretization of the goal of cyber resilience. The fact that a large part of critical infrastructure (energy, transportation, health, finance, etc.) is based in Ankara makes it a priority to carry out risk-based analyses, emergency planning, and national exercises here.

In terms of proactive defense and deterrence goals, public institutions and sectoral Cyber Incident Response Teams (SOME) structures in Ankara serve to strengthen cyber threat intelligence and incident response capabilities. The development of big data and artificial intelligence-supported analysis infrastructures in technology parks and R&D centers increases the capacity to detect and prevent threats at an early stage.

The human-centered cybersecurity approach is aligned with Ankara's education and employment policies. Cybersecurity research centers established at universities, vocational training programs, and entrepreneurship support initiatives targeting youth and women support this goal, while social awareness campaigns have the potential to reach broad audiences in the capital.

The goal of secure technology use is directly related to Ankara's smart city projects, 5G and IoT applications, digital twin and big data analytics initiatives. Ensuring security from the design stage in these areas makes the capital one of the leading application areas for cyber-secure digital transformation.

Software and hardware developed by defense industry and IT companies in Ankara play a critical role in the goal of domestic and national cybersecurity technologies. The certification, testing, and

[6] https://www.uab.gov.tr/uploads/pages/siber-guvenligin-yol-haritasi-yerli-ve-milli-tekno/ulusal-siber-guvenlik-stratejisi-2024-2028.pdf

international market entry processes for these products are carried out in the capital, contributing to the strategy's goal of reducing external dependency.

Within the scope of the Turkey brand goal in the international arena, Ankara is at the center of cyber diplomacy activities thanks to its identity as a diplomatic hub. The capital is an important center for collaborations with international organizations, sharing knowledge and experience, and increasing Turkey's visibility on global platforms.

The six strategic goals defined in the National Cybersecurity Strategy find concrete application in Ankara, and the projects to be developed under the investment and promotion strategy directly contribute to the achievement of these national goals. Ankara is positioned as a leading city in Turkey's cybersecurity vision, both in terms of its technical capacity and its governance structure.

National Rural Development Strategy IV (2024-2028)[7]

The National Rural Development Strategy IV (2024–2028) sets as its fundamental goals the creation of a productive workforce in rural areas, the provision of sustainable natural resource management, the improvement of quality of life, and the reduction of rural-to-urban migration. The strategy is designed in line with the Twelfth Development Plan and aims to contribute to the axes of "stable growth and a strong economy, competitive production through green and digital transformation, a qualified workforce and a healthy society, disaster-resilient living spaces and a sustainable environment, and justice-based democratic governance."

The strategy is structured around six main goals:

- Strategic Goal-1: Ensuring the Economic Sustainability of Agricultural Production and Long-Term Food Security
- Strategic Goal -2: Developing and Managing the Sustainable Use of Natural Resources Against Climate and Environmental Change
- Strategic Goal -3: Reducing the Impact of Natural Disasters on Rural Development
- Strategic Goal -4: Promoting Technological Transformation and Digitalization
- Strategic Goal -5: Ensuring Livability in Rural Areas, Developing Social and Physical Infrastructure and Social Capital
- Strategic Goal -6: Increasing the Effectiveness of Public Institutions for the Development of New Rural Development Models at the Local Level

At the principle level, principles such as efficiency, innovation, sustainability, locality, participation, gender equality, green approach, and digitalization form the basic framework of policy implementation.

The Ankara Provincial Investment and Promotion Strategy is strongly aligned with this national framework and contributes to food security and sustainable production targets through agriculture-based specialized organized industrial zones (TDİOSB), rural tourism, organic farming, and rural entrepreneurship support. Within the scope of climate and environment-focused transformation, water management, erosion control, and renewable energy applications carried out in rural areas around Ankara are consistent with the goals of protecting natural resources. Furthermore, Ankara's geographical and institutional capacity enables the development of applications that will increase disaster resilience in rural areas in terms of reducing disaster risks.

The technological transformation and digitalization target highlighted in the strategy is directly related to Ankara's universities, R&D centers, technoparks, and entrepreneurship ecosystem. The widespread use of digital agriculture technologies, remote sensing systems, and geographic information system (GIS)-

[7] https://www.tarimorman.gov.tr/TRGM/Belgeler/0Yay%C4%B1nlar%C4%B1m%C4%B1z/UKKS%20IV.PDF

based solutions in rural areas is supported by the capital's knowledge and technology infrastructure. In terms of improving livability in rural areas, strengthening access to health and education services in rural areas, expanding social and cultural programs, and encouraging rural tourism investments are concrete areas of contribution for Ankara.

In the context of governance and institutional effectiveness, public institutions, development agencies, professional organizations, and civil society organizations located in Ankara play a central role in the planning, coordination, and monitoring processes of rural development policies ( ). The resulting institutional capacity strengthens the local applicability of the "multi-stakeholder, participatory, and inclusive development model" envisaged by the strategy.

The relationship between the National Rural Development Strategy-IV (2024–2028) and the Ankara Provincial Investment and Promotion Strategy shows a strong overlap in the areas of agricultural sustainability, environmentally and climate-friendly policies, disaster resilience, digitalization, social development, and governance. Ankara, with its rural hinterland, institutional capacity, and investment projects, has the potential to be a pioneering and exemplary center in the implementation of this national strategy.

Industry and Technology Strategy 2030[8]

The 2030 Industry and Technology Strategy aims to build a strong and competitive industrial ecosystem in the areas of high technology, digital transformation, green transformation, and global integration, centering on Turkey's "National Technology Initiative" vision. The document is structured around 20 macro goals, 5 goals, 100 strategies, and priority programs/projects. Five goals have been defined within the scope of the 2030 Industry and Technology Strategy, which are as follows:

- Goal 1: Increase domestic production capacity in high technology and critical areas and eliminate external dependency
- Goal 2: To become one of the leading countries in the technological age by facilitating the transition to a digital economy
- Goal 3: Reduce carbon emissions from industry by facilitating the transition to a green and circular economy
- Goal 4: To increase integration into global markets and enhance competitiveness
- Goal 5: To solve the manufacturing industry's problems of efficiency, capacity, and scale; to increase resilience against crises and shocks

The Ankara Provincial Investment and Promotion Strategy develops policies and practices closely related to each of these goals. With its sectoral diversity, strong academic infrastructure, decision-making centers, and entrepreneurial ecosystem, the capital city contributes directly to the implementation of the national vision in the field.

In high-tech and critical areas, Ankara has strong clusters in fields such as the defense industry, artificial intelligence, semiconductors, health technologies, and renewable energy. Projects envisaged in the strategy, such as the National Chip Consortium, National Quantum Institute, and Biotechnology Production Program, directly guide university-industry cooperation mechanisms in Ankara.

In the digital economy, the capital stands out with its technoparks, R&D centers, and entrepreneurial ecosystem. The artificial intelligence supercomputer investments, blockchain and financial technologies, cybersecurity solutions, and Internet of Things applications envisaged in the strategy are strong investment areas that can be developed in Ankara. In addition, applications such as Open Source

[8] https://www.sanayi.gov.tr/plan-program-raporlar-ve-yayinlar/strateji-belgeleri/mu2103011621

Solutions and the KOSGEB Digital Payment System will directly contribute to the digitalization of SMEs in the city.

Within the scope of the green and circular economy, actions such as Green and Digital Transformation Centers, the National Hydrogen Program, Domestic Nuclear Reactors, and Nuclear Technology Parks are in line with Ankara's current investment plans. Energy efficiency-focused OIZ projects, circular economy initiatives, and carbon reduction efforts are being implemented in the capital within the framework of a transformation aligned with the European Green Deal.

Ankara's central location is a major advantage in terms of integration into global markets and technology diplomacy. Projects defined in the strategy that will have a global impact, such as STI Diplomacy, Terminal Istanbul, Space Port, and the National Satellite Company , can be more effectively supported through international cooperation thanks to the presence of public institutions and international organizations in Ankara.

In the manufacturing industry, strategies such as increasing the number of Model Factories, strengthening the logistics connections of organized industrial zones (OSBs), developing disaster management technologies, and implementing new incentive systems stand out in the context of productivity and structural transformation. The Model Factory, which has started operating in Ankara, is one of the applications that exemplify the concretization of these goals.

The Ankara Provincial Investment and Promotion Strategy, within this comprehensive framework, directly contributes to the implementation of the priorities outlined in the 2030 Industry and Technology Strategy across a wide range of areas, from high technology to digitalization, green transformation to global integration, and manufacturing industry to the entrepreneurial ecosystem. The capital city plays a key role in the success of the strategy, not only with its potential to attract investment, but also with its strong ecosystem that increases the applicability of national strategies.

Green Deal Action Plan 2021[9]

The Green Deal Action Plan, prepared to strengthen Turkey's alignment with the European Union's Green Deal process, presents a comprehensive transformation vision covering many sectors such as industry, energy, transportation, agriculture, finance, and foreign trade, in line with the climate neutrality target by 2050. The plan is directly related to growing environmental concerns on a global scale, carbon emission reduction targets, and the rise of sustainable development. The action plan aims to increase Turkey's capacity to adapt to the European market, which is critical to its exports, and to accelerate the structural changes required by the green and digital transformation.

The action plan's goals are structured under eight main headings:

- Alignment with the Carbon Border Adjustment Mechanism (CBAM)
- Green and circular economy
- Green financing
- Clean, economical, and secure energy supply
- Sustainable agriculture
- Sustainable smart transportation
- Combating climate change
- Foreign trade diplomacy and communication activities

Concrete actions such as regulatory compliance, investment incentives, new financing models, technology transfer, and capacity building are defined under each heading. This structure aims to

[9] https://ticaret.gov.tr/data/60f1200013b876eb28421b23/MUTABAKAT%20YE%C5%9E%C4%B0L.pdf

transition the Turkish economy away from carbon-intensive sectors to a low-carbon and resource-efficient model.

The Ankara Provincial Investment and Promotion Strategy provides strategic contributions in many areas that directly intersect with the Green Deal Action Plan. The green OIZ transformation projects launched in organized industrial zones in the capital, the use of clean production technologies, and energy efficiency applications support the action plan's green and circular economy goals. In addition, Ankara's strong academic structure and research centers provide a foundation for the development of carbon border adjustment mechanism, water and energy efficiency applications, life cycle assessments, and zero waste projects.

In terms of financing, innovative financial instruments such as green bonds and green sukuk envisaged in the plan offer alternative funding mechanisms for technology startups and large-scale energy projects in Ankara. In this context, Ankara has the potential to be one of the pilot cities for the development of a green finance ecosystem. In the energy sector, the more efficient use of solar, biomass, and geothermal resources ( ) both supports low-carbon production and ensures that Ankara becomes a center of attraction for environmentally friendly energy investments.

In line with sustainable agriculture and food security goals, agriculture-based specialized organized industrial zones (TDİOSB) around Ankara, organic production, and rural development projects stand out. These structures contribute to both strengthening rural employment and bringing agricultural production up to European standards. In terms of sustainable transportation, Ankara's electric vehicle infrastructure, low-emission vehicle investments in public transportation, and smart transportation systems are directly in line with the transformation envisaged in the action plan.

In the context of combating climate change, Ankara's status as a region with a high risk of drought and water stress increases the strategic importance of projects to be developed in this area. Water efficiency, reuse technologies, nature-based solutions, and disaster-resilient urban planning studies enable the adaptation and mitigation policies envisaged in the plan to find concrete application areas in Ankara. Furthermore, as the capital city, Ankara has the capacity to play a central role in foreign trade diplomacy and communication activities, thereby increasing Turkey's visibility in international green transformation processes.

The relationship between the Green Deal Action Plan and the Ankara Provincial Investment and Promotion Strategy creates strong synergy, particularly in the areas of green OIZ transformation, innovative financing tools, clean energy investments, smart transportation, and sustainable agriculture. With its production capacity, academic expertise, entrepreneurial ecosystem, and governance infrastructure, Ankara contributes to achieving the plan's goals at the national level and is becoming a model center for green transformation for international investors.

Climate Change Mitigation Strategy and Action Plan (2024-2030)[10]

The Climate Change Mitigation Strategy and Action Plan (2024–2030) is the fundamental policy document for reducing greenhouse gas emissions on Turkey's path to its 2053 Net Zero Emissions vision. The plan was prepared within the framework of the 12th Development Plan, the Medium-Term Program, and the updated Nationally Determined Contribution (NDC), and it sets out the roadmap to be followed in the fight against climate change until 2030.

The document defines seven key reduction sectors: energy, industry, buildings, transportation, waste, agriculture, land use, and forestry (AKAKDO). In addition, cross-cutting policy areas such as just transition and carbon pricing mechanisms have been identified. Within this framework, a total of 49

[10] https://iklim.gov.tr/db/turkce/icerikler/files/%Climate Change Mitigation Strategy and Action Plan (2024-2030).pdf

strategies and 260 actions will be implemented. During the preparation of the strategy, workshops with broad participation were held, involving more than 2,000 stakeholders from the public, private, and civil society sectors.

The Ankara Provincial Investment and Promotion Strategy is directly linked to this document. As the capital city, Ankara plays a critical role in reducing greenhouse gas emissions due to its intensive production and consumption infrastructure in the energy and industry sectors. In particular, efforts such as renewable energy use, energy efficiency applications, waste management projects, and carbon border adjustment mechanism in organized industrial zones are consistent with the action plan's energy and industry strategies.

In the areas of buildings and transportation, Ankara stands out with its urban transformation projects, green building applications, and low-emission public transportation investments. Smart transportation systems, electric vehicle charging infrastructure, and micromobility solutions contribute to the implementation of transportation sector strategies at the local level.

In terms of agriculture and land use, the Agriculture-Based Specialized Industrial Zone projects developed in rural Ankara, modern irrigation techniques, biogas plants, and afforestation activities aimed at increasing carbon sink areas are directly related to the mitigation measures envisaged in the national strategy.

However, just transition and carbon pricing mechanisms are of particular importance for Ankara. The city's financial sector can play a pilot role in developing green bonds and carbon market instruments. Furthermore, universities, technology parks, and vocational training institutions in Ankara are key actors in the processes of reshaping employment, training a green workforce, and creating new occupational fields.

The Ankara Provincial Investment and Promotion Strategy has the capacity to implement the priorities of the Climate Change Mitigation Strategy and Action Plan at the local level in many areas, from energy transition to green transportation, from sustainability in agriculture to carbon markets. Ankara's industrial infrastructure, academic capacity, and governance power position the city as a model center for the implementation of national climate policies in the 2024–2030 period.

Women's Empowerment Strategy Document and Action Plan 2024-2028[11]

The Women's Empowerment Strategy Document and Action Plan (2024–2028) is a top-level policy document designed to ensure women have equal access to opportunities in all areas of economic, social, cultural, and political life, built on five policy axes. The five fundamental goals, 20 strategies, and 83 activities outlined under the headings of education, health, economy, leadership and participation in decision-making mechanisms, and environment and climate change are defined as an integral part of the national development vision. The Ankara Provincial Investment and Promotion Strategy directly supports this document with its strong institutional capacity, multi-stakeholder structure, and broad sector coverage to translate it into action on the ground.

The targets envisaged under the education axis are being concretely implemented in Ankara through universities, vocational training centers, and technology parks. The development of digital skills, the encouragement of girls and young women in STEM fields, and lifelong learning activities occupy a central place in Ankara's human resources strategy. In this regard, accelerated skills programs implemented in the province directly strengthen the participation of women and young entrepreneurs in the technology-focused labor market.

[11] https://www.aile.gov.tr/media/158302/kadinin-guclenmesi-strateji-belgesi-ve-eylem-plani-2024-2028.pdf

The health axis is supported by Ankara's strong health infrastructure and investments in health technologies. Preventive services related to women's health, prenatal and postnatal care, accessible health services, and social awareness programs are implemented in conjunction with projects carried out in the capital. The indicators envisaged in the strategy (reducing maternal mortality rates, increasing access to healthcare services) are directly reflected in the capacity of healthcare institutions in Ankara.

The economic axis is supported by practices that increase women's participation in the workforce in Ankara and enable them to be part of the entrepreneurship ecosystem. Women entrepreneurs' access to production capacity in organized industrial zones is facilitated, and special programs for women entrepreneurs are implemented in technoparks and incubator centers. Furthermore, a gender-responsive budgeting approach strengthens women-owned businesses' access to public procurement and incentives. Thus, the strategy's goals of labor force, entrepreneurship, and reducing informality are directly implemented in Ankara.

The axis of participation in leadership and decision-making mechanisms is strongly aligned with the goals of the strategy, given Ankara's central role in national decision-making processes. Activities aimed at increasing the representation of women in parliament, local government, universities, and senior management in the private sector are supported by mentoring programs, role model projects, and merit-based appointment processes carried out in the capital. Ankara is the most critical center for implementing the goal of increasing women's representation at the national level.

The environment and climate change axis is being realized in Ankara through green OIZ applications, energy efficiency projects, smart transportation systems, and sustainable urban transformation investments. Support for the employment of women in environment and climate-focused projects and their participation as entrepreneurs strengthens the egalitarian transformation envisaged by the strategy. Furthermore, local projects that ensure women's active participation in disaster-resilient planning processes are progressing in line with the document's intersecting policy areas.

The goals defined in the Women's Empowerment Strategy Document and Action Plan are supported in the field by the Ankara Provincial Investment and Promotion Strategy across a wide range of areas, from education to employment, health to governance, and environment to climate. Ankara, with its academic infrastructure, industrial and technopark capacity, and health and social services infrastructure, plays a central role in translating the priorities of this high-level policy document into practice, producing measurable results, and strengthening inclusive development.

National Regional Development Strategy (2024-2028)[12]

The National Strategy for Regional Development (BGUS) 2024–2028 is the fundamental policy document that addresses Turkey's spatial and sectoral development priorities within a comprehensive framework. The strategy sets out the vision of "a Turkey that is competitive globally, with high-welfare and resilient regions, and that has achieved comprehensive development by utilizing its local dynamics." The strategy is built on four dimensions of development: global integration, competitiveness, convergence, and post-disaster recovery.

The strategic goals defined within the scope of BGUS are as follows:

- Strengthening the global economic integration of regions
- Increasing the competitiveness of regions
- Ensuring economic and social convergence between regions
- Ensuring post-disaster economic and social recovery

[12] https://www.sanayi.gov.tr/bolgesel-kalkinma-faaliyetleri/strateji-belgeleri/01135b

BGUS takes into account the development potential, socioeconomic indicators, and spatial characteristics of each region using a spatial typology approach; thus, it develops complementary policies from the local to the national and from the national to the global level. In addition, the strategy defines thematic policy areas as well as spatial goals: urban development, rural development, social development, tourism, industry-logistics, green growth, entrepreneurship, R&D and innovation, and digitalization have been identified as key thematic axes.

The Ankara Provincial Investment and Promotion Strategy is directly related to the vision and goals set by BGUS. Ankara is classified among the "potential global provinces" and stands out for its role in global value chains and technology and knowledge-intensive activities. The entrepreneurial ecosystem developed in the capital, technology parks, advanced manufacturing industry, and defense technology projects contribute to BGUS's goals of increasing competitiveness and strengthening global integration. At the same time, green OIZ projects, energy efficiency applications, smart transportation systems, and disaster-resilient urban planning initiatives are consistent with the strategy's environmental sustainability and post-disaster recovery axes.

Entrepreneurship, R&D, and digitalization, which are among BGUS's thematic goals, coincide with Ankara's strengths. University-industry cooperation, research centers, accelerator programs, and policies supporting women's and youth entrepreneurship in the city contribute to the achievement of national goals by increasing both employment and innovation capacity. Furthermore, Ankara's status as the capital city, its multi-stakeholder governance processes, and the presence of decision-making centers here offer significant advantages for implementing the principles of participation, cooperation, and governance envisioned by BGUS.

The Ankara Provincial Investment and Promotion Strategy is multidimensionally aligned with BGUS's four strategic goals and thematic policy areas. The capital supports global integration and competitiveness goals thanks to its strong academic infrastructure, technology-focused entrepreneurial ecosystem, leadership in defense and health technologies, logistics capacity, and industrial clusters. Green OIZ projects, low-carbon transportation investments, energy efficiency applications, and disaster-resilient urban planning initiatives embody BGUS's priorities in the areas of environmental sustainability and resilience. Furthermore, Ankara, with its centralized decision-making mechanisms and strong governance capacity, is well-positioned to implement multi-stakeholder collaborations and serve as an inclusive development model at both the regional and national levels. The integrated structure that has been created positions Ankara not only as an area for implementing national strategies, but also as a guiding center for shaping regional development policies.

Ankara Regional Plan (2024-2028)[13]

The Ankara Regional Plan (2024–2028) is a strategy document that outlines Ankara's socio-economic development vision and integrates local potential with national and global goals. The plan is based on the vision of "Ankara, the capital of thought and innovation, with a high quality of life, competing with the world." The defined vision integrates the city's historical, cultural, and strategic capital identity with its technological, economic, and human capital capacity.

The Ankara Regional Plan (2024–2028) is structured around four main axes:

- Living in Ankara
- Working in Ankara
- Environment in Ankara
- Sub-regions in Ankara

[13] https://kutuphane.ankaraka.org.tr/upload/dokumandosya/ankara_2024-2028_bolge_plani_06112024.pdf

Under these axes, 5 strategic priorities, 16 goals, and 70 measures have been defined. The strategic priorities are as follows:

- Strategic Priority 1: Strengthening Ankara's global position through its qualified human capital, spatial quality, and cultural and historical assets
- Strategic Priority 2: Ensuring social inclusion and balanced spatial development in Ankara, reducing social inequalities
- Strategic Priority 3: Increasing high-tech production and exports, enhancing the competitiveness of businesses, and strengthening the entrepreneurship and innovation ecosystem
- Strategic Priority 4: Reducing the negative environmental impacts of economic and daily activities in Ankara
- Strategic Priority 5: Establishing an innovative and sustainable rural-urban relationship in Ankara's sub-regions

The goals set out in the plan are to strengthen the city's role as a global political and cultural capital, improving accessibility, developing urban resilience and sustainable housing policies, creating interfaces for cooperation in high value-added sectors, spreading green and digital transformation in industry and agriculture, supporting innovation and entrepreneurship, ensuring the protection of natural resources, and encouraging value-added production in rural tourism and agriculture.

There is a strong overlap between the Ankara Provincial Investment and Promotion Strategy and the Regional Plan. The focus on high-tech production, innovation, and entrepreneurship emphasized in the Regional Plan is directly implemented through Ankara's technology parks, universities, and R&D centers. Green and digital transformation-focused goals are supported by sustainability and efficiency efforts in the capital's organized industrial zones. Policies aimed at highlighting cultural and historical values are integrated with Ankara's tourism investments and promotion projects. Furthermore, measures identified in the areas of rural development, agricultural production, and rural tourism are being concretely implemented through agriculture-based specialized organized industrial zones (TDİOSB) and rural tourism projects developed around Ankara.

The Ankara Regional Plan (2024–2028) aims to increase the city's competitiveness on a global scale, strengthen social welfare, ensure environmental sustainability, and achieve integrated development with its sub-regions. The Ankara Provincial Investment and Promotion Strategy serves as a guiding tool for investors and decision-makers, ensuring that this vision is reflected on the ground. Thus, Ankara is becoming both a model city and a strategic center guiding national policies in the implementation of regional development goals.

High-level policy documents outline a common direction for the 2024–2030 period, focusing on green transformation, digitalization, innovation, and human capital–employment. The Ankara Provincial Investment and Promotion Strategy stands out with its institutional capacity to implement these axes, its strong ecosystem, and its multi-stakeholder structure. Thanks to its capital city identity, deep-rooted academic infrastructure, dynamic technology parks, industrial zones, and entrepreneurial networks, Ankara is becoming a pioneering center that not only aligns with these documents but also transforms the national vision on the ground.

Ankara provides a reliable implementation area for the goals outlined in the documents, taking concrete steps to improve the investment environment, accelerate green and digital projects, and strengthen employment. This approach, which provides confidence and predictability for international investors, positions Ankara as a showcase city for Turkey's transformation.

2.2. General Overview of Ankara

Beyond being Turkey's capital, Ankara is one of the country's most strategic provinces due to its geographical location, advanced transportation infrastructure, socio-economic dynamics, and cultural heritage. Its location in the center of the Central Anatolia Region and its position on transportation networks connecting east-west and north-south axes have made Ankara a logistics hub at both the national and regional levels.

The rapidly growing population structure, increasing urbanization rate, and demographic diversity in recent years play a decisive role in the city's socioeconomic outlook. The distribution of the population across age groups, the increase in education levels, and transformations in the labor market are strengthening Ankara's human capital capacity. In particular, the young and educated population structure fuels the city's entrepreneurial ecosystem, innovative sectors, and high value-added production potential.

With its public institutions, universities, research centers, and technology development zones, Ankara is not only Turkey's administrative center but also a leading city in knowledge and technology production. The advanced level of social infrastructure indicators, particularly in education and health, makes the city attractive in terms of livability.

The analysis of Ankara's geographical, demographic, educational, social infrastructure, and labor force indicators reveals the city's strengths and areas for development, providing a solid foundation for investment and promotion strategies. Monitoring and evaluating these indicators over the next five years will be critical in determining strategic directions to enhance Ankara's competitiveness. Assessments of Ankara's overall outlook will be addressed under the headings of geographical location and area, transportation networks, population and demographic structure, education level, social infrastructure indicators, and labor force profile. This analysis, based on data from the last five years, will reveal the city's current situation while also shedding light on the shaping of the investment and promotion strategy.

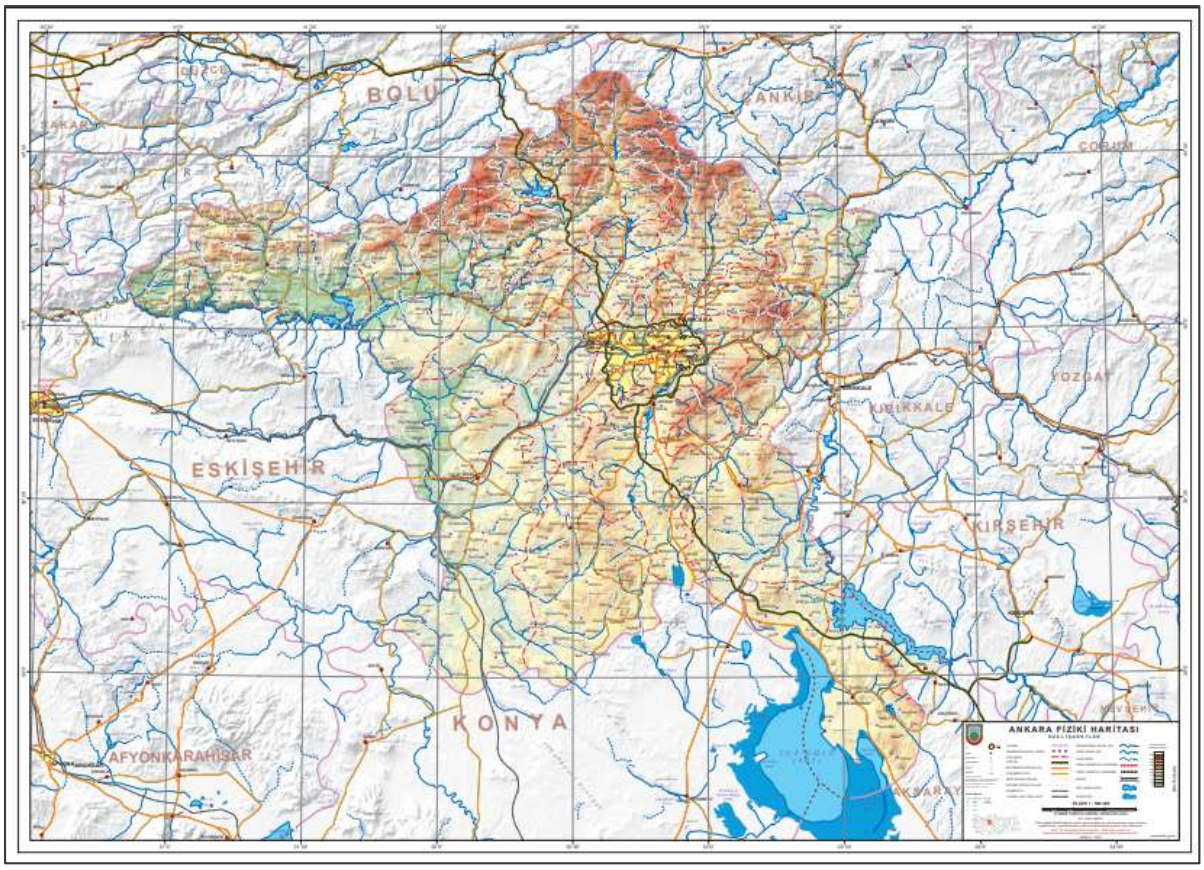
Geographical Location

Ankara Province is located in the Upper Sakarya section of the Central Anatolia Region, between 39°57' north latitude and 32°53' east longitude. Ankara, the capital of the Republic of Turkey, is the third largest province in the country in terms of area, with an area of 26,897 km², after Konya and Sivas. With an average altitude of 890 meters, the city reflects the characteristic structure of the Central Anatolia plateau and is bordered by Kırşehir and Kırıkkale to the east, Eskişehir to the west, Çankırı to the north, Bolu to the northwest, and Konya and Aksaray provinces to the south.

There are a total of 25 districts in the province, with large districts such as Çankaya, Keçiören, Yenimahalle, Mamak, Sincan, and Etimesgut standing out in terms of population density and economic capacity. Rural districts, on the other hand, strengthen the province's diversity, particularly in terms of agricultural production, natural resources, and tourism potential.

Ankara's geographical location, at the intersection of Turkey's east-west and north-south transportation corridors, makes the city not only an administrative center but also a logistical and economic hub. This feature is a key advantage in shaping investment and promotion strategies.

Figure 1: Physical Administrative Map of Ankara



Source: General Directorate of Mapping, 2025.

Transportation Network

Ankara is strategically located at the intersection of Turkey's main north-south and east-west transportation corridors, making it a strategic center in terms of road, rail, and air connections. This geographical advantage ensures that the city has a high level of accessibility at both the national and regional levels.

The province has 5,416 km of road infrastructure, of which 361 km are state roads and 306 km are highways and ring roads. The transportation backbone formed by the radial arteries extending from the city center to the periphery and the ring road has supported new residential, university, and employment areas, along with the development that has intensified in the western corridor (Eskişehir Road) since the 1980s. Today, the Istanbul Road axis in the northwest, the Mamak axis in the east, and the Gölbaşı axis in the south are also developing; the Sincan–Temelli–Polatlı line and the Istanbul Road–Anadolu Boulevard area stand out as investment axes where organized industrial zones (OSB) are concentrated.

In terms of rail transport, Ankara is the junction point of Turkey's High-Speed Train (YHT) network. Direct connections are provided to major centers such as Istanbul, Eskisehir, Konya, and Sivas, while the Başkentray line offers intra-city suburban transport between Sincan and Kayaş. The city's rail network operates in an integrated manner with Ankaray and four separate metro lines, reaching a total length of 67.4 km (EGO General Directorate, 2025) . This structure makes public transportation, along with road transportation, a rational and accessible option.

The capital's national and international accessibility in air transport is provided through Esenboğa Airport. Passenger traffic across Turkey experienced a sharp decline during the pandemic, but with a rapid recovery after 2021 , it reached record levels in 2024 with 230.8 million passengers. During this

period, the number of domestic passengers was 95.3 million, while the number of international passengers was 134.9 million.

Table 1: Passenger Traffic at Turkish Airports

Year	2019	2020	2021	2022	2023	2024
Total Passenger Traffic (Including Direct Transit)	208,911,338	81,703,685	128,350,222	182,225,531	214,136,575	230,833,911
Total Passenger Traffic	208,373,696	81,616,140	128,155,762	181,789,339	213,693,163	230,291,231
Domestic Passenger Count	99,946,572	49,740,303	68,466,177	78,323,824	90,390,766	95,356,111
International Passenger Count	108,427,124	31,875,837	59,689,585	103,465,515	123,302,397	134,935,120
Direct Transit Passenger	537,642	87,545	194,460	436,192	443,412	542,680

Source: General Directorate of State Airports Authority, 2024.

Esenboğa Airport served 9.7 million domestic and 3.2 million international passengers in 2024.**Hata! B aşvuru kaynağı bulunamadı.** , Istanbul Airport leads with 63 million international passengers, Sabiha Gökçen leads with 19.5 million domestic passengers, and Antalya Airport carried 31.7 million international passengers due to tourism. Although Esenboğa is a strong domestic hub, it needs to develop its international capacity.

Table 2: Passenger Numbers at Istanbul, Ankara, Izmir, and Antalya Airports

Airport	Passenger Numbers	
	Domestic Flights	International Flights
Istanbul Sabiha Gökçen Airport	19,548,003	21,994,425
Istanbul Airport	17,354,812	63,014,701
Ankara Esenboğa Airport	9,726,323	3,238,443
Izmir Adnan Menderes Airport	6,674,928	4,857,664
Antalya Airport	6,388,859	31,709,753

Source: General Directorate of State Airports Authority, 2024.

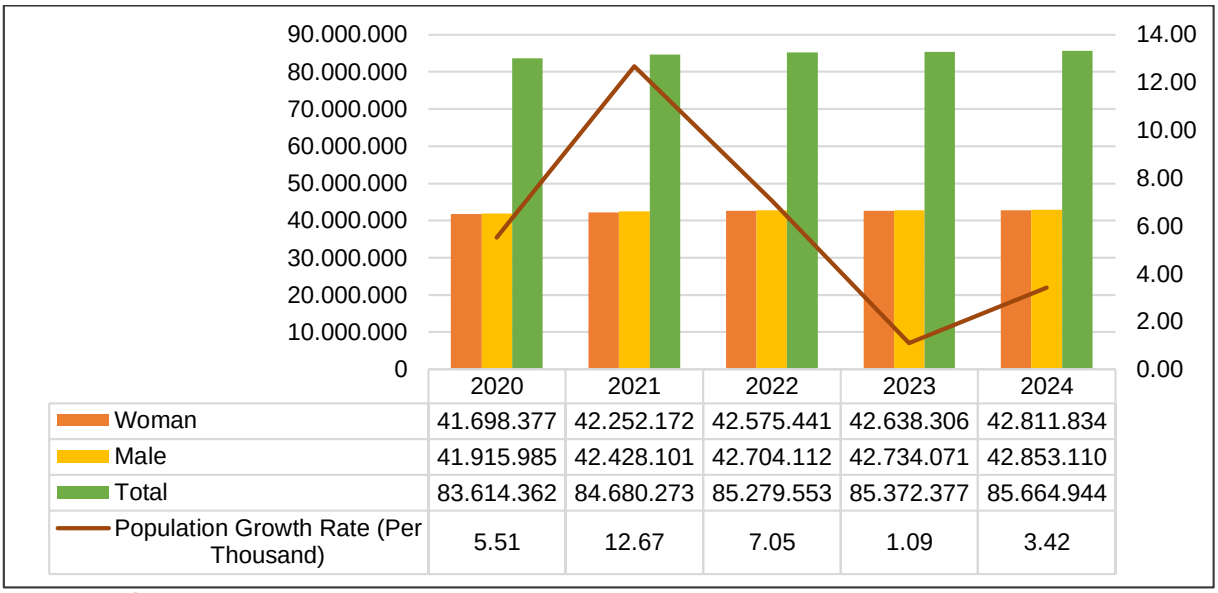
The resulting picture shows that Ankara is a strong domestic hub on a national scale, but lags behind Istanbul and Antalya in terms of international passenger traffic. The planned Esenboğa Metro Line and investments aimed at increasing international flight capacity will contribute to positioning the capital not only as an administrative center but also as an international access and logistics hub.

Ankara's integrated road, rail, and air connections make it a regional and national logistics hub, offering a strong competitive advantage in terms of investment and promotion strategy.

Population and Demographic Structure

Demographic structure provides a decisive framework in shaping Ankara's investment and promotion vision, both in terms of labor supply and demand for social services. In this context, population trends, gender composition, and age distribution over the last five years have been examined in comparison with Turkey as a whole, and strategic conclusions have been evaluated.

Figure 2: Population Trend in Türkiye by Year

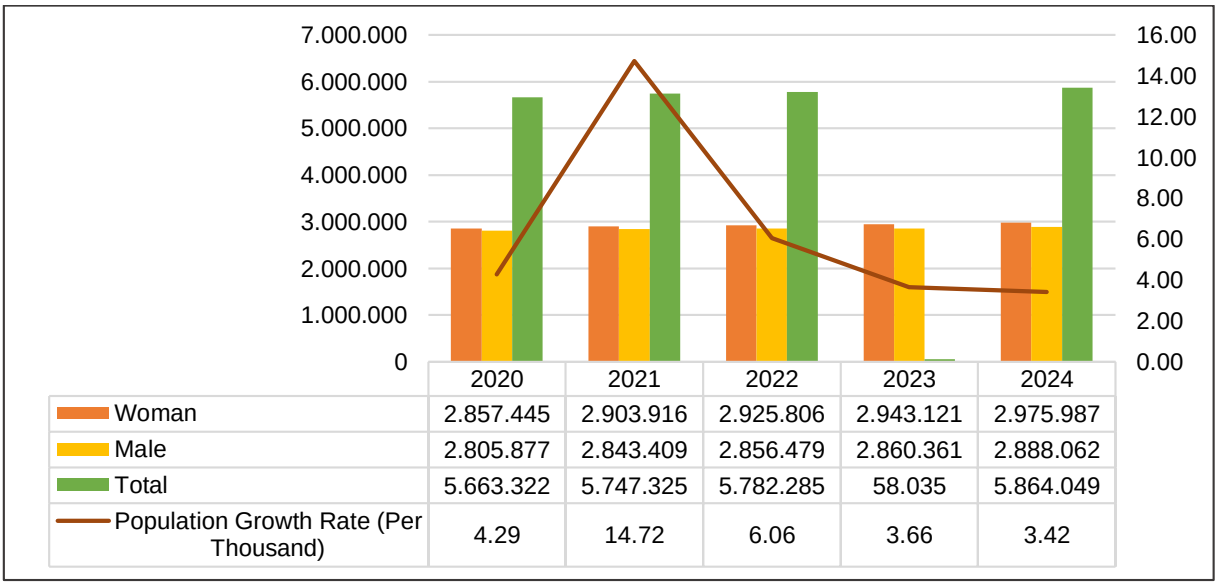


	2020	2021	2022	2023	2024
Woman	41.698.377	42.252.172	42.575.441	42.638.306	42.811.834
Male	41.915.985	42.428.101	42.704.112	42.734.071	42.853.110
Total	83.614.362	84.680.273	85.279.553	85.372.377	85.664.944
Population Growth Rate (Per Thousand)	5.51	12.67	7.05	1.09	3.42

Source: TÜİK, 2024.

Turkey's total population reached 85.65 million in 2024. Women make up 49.96% of the population, while men make up 50.04%. The population growth rate, measured at 5.51 per thousand in 2020, rose to 12.67 per thousand in 2021 due to the post-pandemic recovery effect. 7.05 per thousand in 2022, 1.09 per thousand in 2023, and 3.42 per thousand in 2024. This trend shows that Turkey is experiencing a decline in fertility and an increase in life expectancy; therefore, the demographic structure is evolving into a slowing but positive growth dynamic.

Figure 3: Population Trend in Ankara by Year

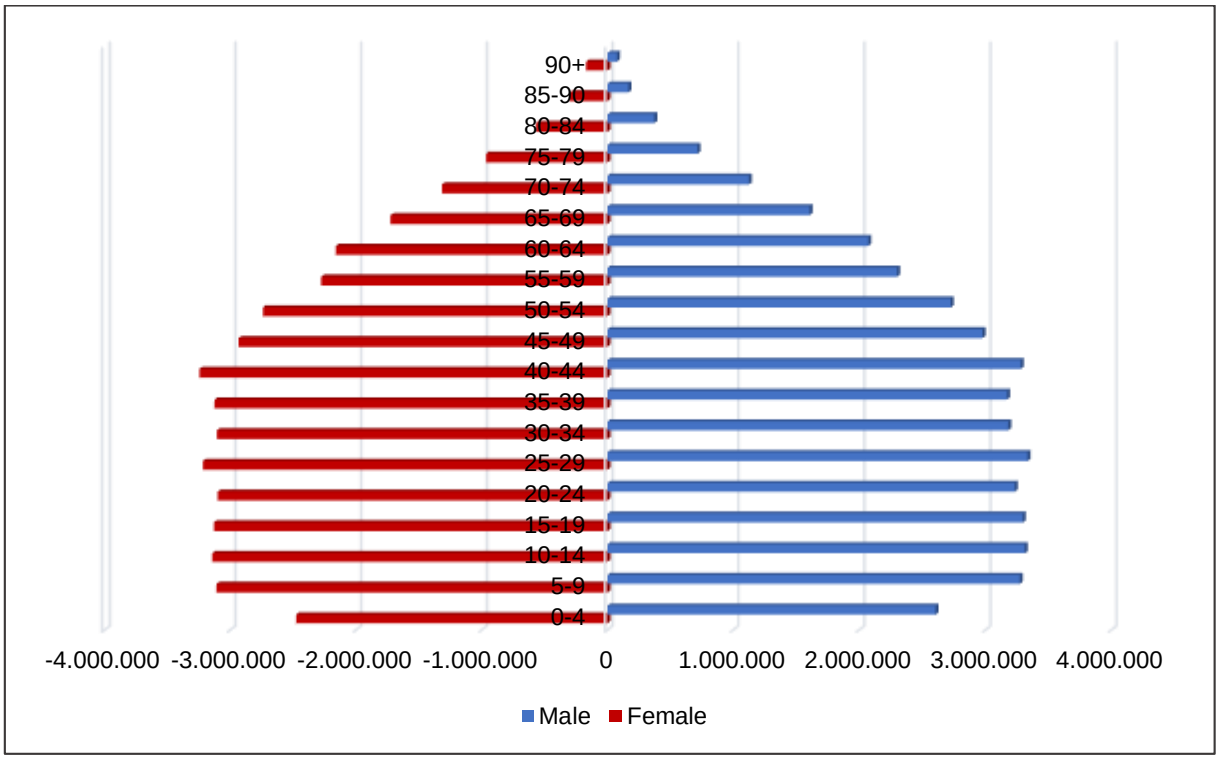


	2020	2021	2022	2023	2024
Woman	2.857.445	2.903.916	2.925.806	2.943.121	2.975.987
Male	2.805.877	2.843.409	2.856.479	2.860.361	2.888.062
Total	5.663.322	5.747.325	5.782.285	58.035	5.864.049
Population Growth Rate (Per Thousand)	4.29	14.72	6.06	3.66	3.42

Source: TÜİK, 2024.

The population of Ankara reached 5,864,049 in 2024. Women constitute 50.7% of the total population, while men constitute 49.3%. Over the last five years, Ankara's population has shown steady growth, increasing by approximately 200,000 from 5.66 million in 2020 to 5.86 million in 2024. The population growth rate recorded a remarkable jump to 14.7 per thousand in 2021, fluctuating between 3 and 6 per thousand in subsequent years, in line with the national average. The findings reveal that Ankara has been less affected by the demographic mobility across the country and that its population growth has continued in a more balanced manner.

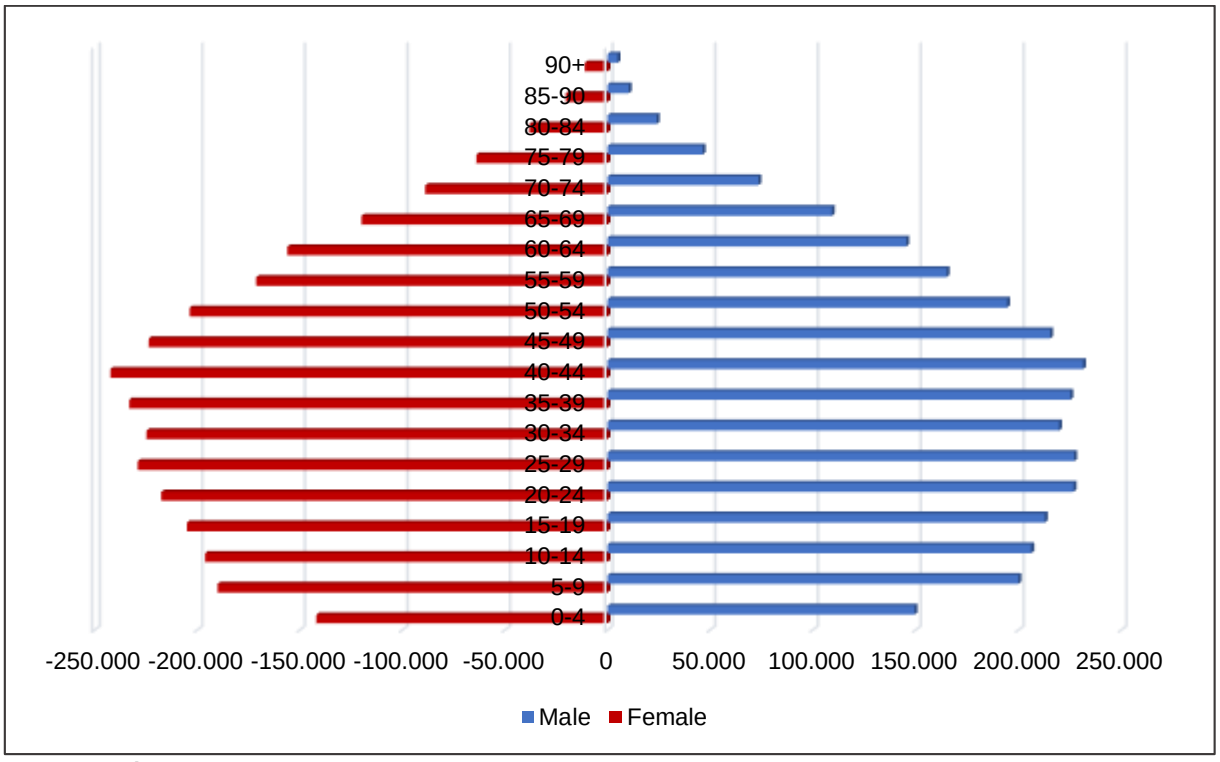
Figure 4: Türkiye Population Pyramid (2024)



Source: TÜİK, 2024.

Population pyramids reveal the age structure of Turkey and Ankara in a comparative manner. With the decline in fertility rates and the increase in life expectancy in Turkey, the proportion of young people is gradually shrinking, while a marked concentration is observed in the middle age groups. The findings point to a stagnant population pyramid approaching the typology of developed countries.

Figure 5: Ankara Population Pyramid (2024)



Source: TÜİK, 2024.

The Ankara population pyramid has a narrower base compared to the Turkish average, showing high density in middle age groups and an increasing trend in the elderly population. This table shows that Ankara has entered an aging process earlier than the country as a whole in demographic terms; however, the proportion of young and dynamic population remains strong.

Evaluating the demographic structure in terms of development typologies reveals Ankara's position more clearly. A broad-based population pyramid indicates high fertility and a predominance of young people, a narrowing pyramid indicates low fertility and an increasing elderly population, and a stable pyramid indicates a balanced age distribution. While Turkey's pyramid is approaching a stagnant typology, Ankara's pyramid is closer to a narrowing typology. This shows that the educated workforce in the capital city continues to exist, but the elderly population is gradually increasing.

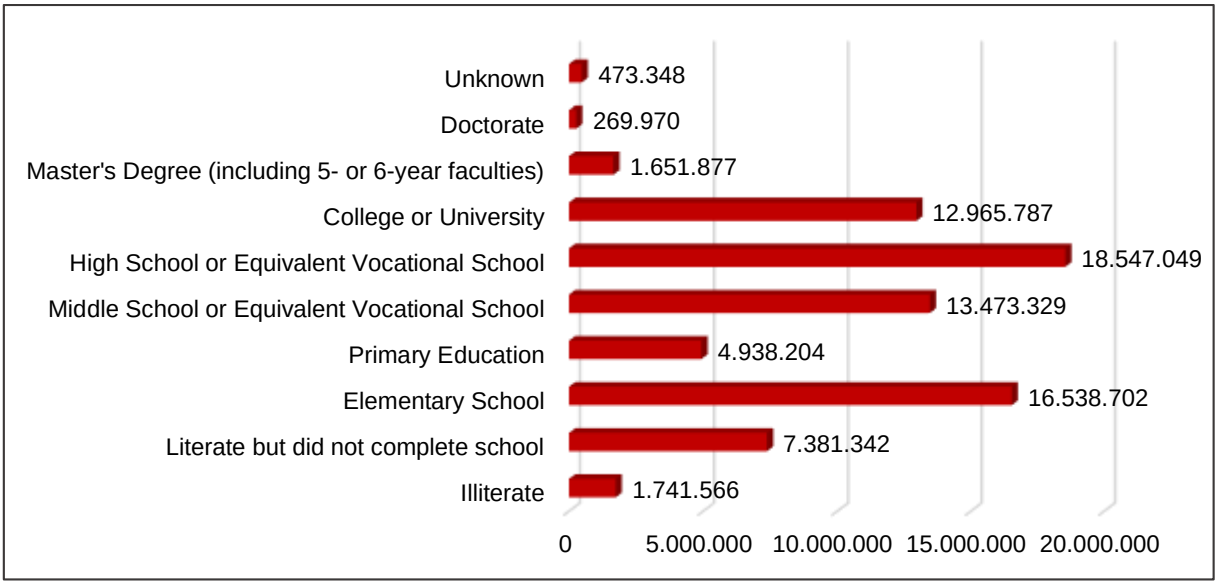
Ankara's population and demographic structure reveal a dual dynamic from a strategic perspective. On the one hand, the concentration of the population aged 20–49 provides a strong resource for the labor market and the entrepreneurial ecosystem. On the other hand, the increase in the population aged 65 and over creates new investment areas for healthcare services, the care economy, and age-friendly urban policies. The relatively balanced growth rate allows for predictable planning of the city's housing, transportation, and social infrastructure capacity. Therefore, Ankara's demographic outlook necessitates a comprehensive investment and promotion strategy that both capitalizes on the opportunities offered by the young workforce and takes into account the needs of the aging population.

Educational Profile

The most important element complementing Ankara's demographic structure is its educational profile, which directly shapes the city's human capital capacity. Educational indicators reveal that Ankara has a higher level of education than the Turkish average and that the capital has strong potential for a qualified workforce.

When examining the educational status of the population aged 6 and over across Turkey, it is seen that as of 2024, 16.5 million people have graduated from primary school, 13.5 million from middle school, and 18.5 million from high school and equivalent vocational schools. The total number of higher education graduates (including associate's, bachelor's, master's, and doctoral degrees) reached 14.8 million. This table shows that despite the progress made in secondary and higher education, a significant portion of the population still has an education level below high school.

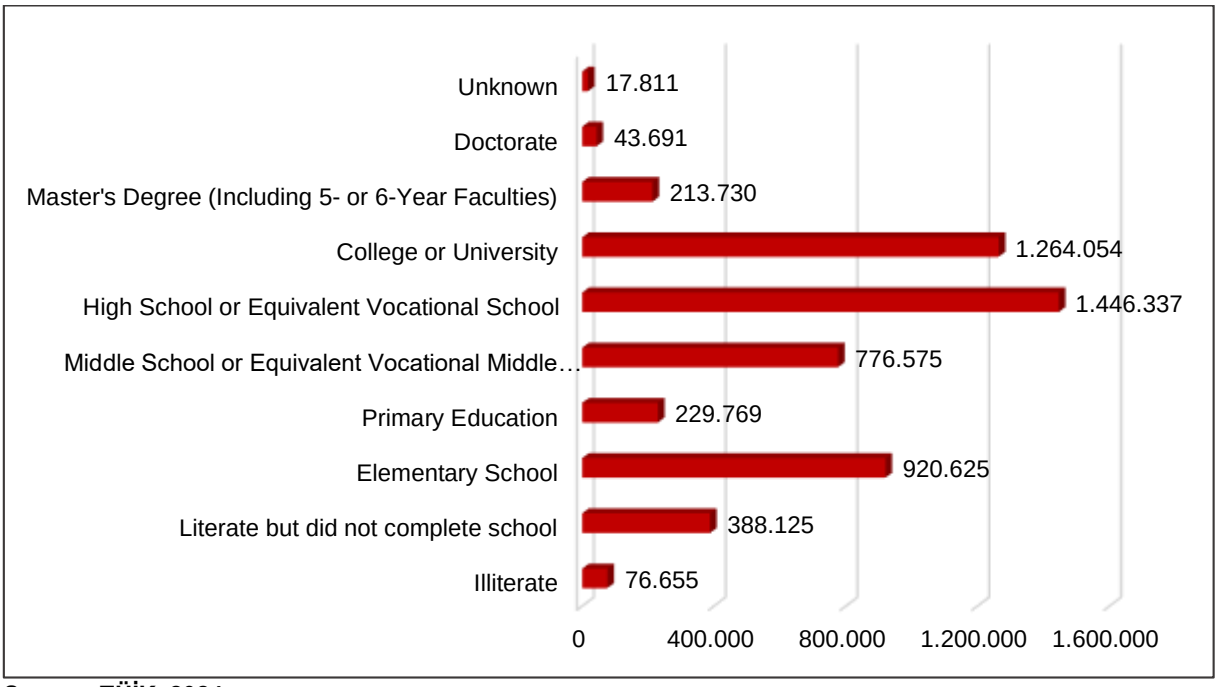
Figure 6: Educational Attainment of Türkiye's Population Aged 6+



Source: TÜİK, 2024.

The picture is different in Ankara. As of 2024, 1.26 million people in the city are higher education (associate's–bachelor's degree) graduates. The total number of master's and doctoral degree graduates has reached approximately 257,000. These figures show that Ankara has a more highly educated population compared to the Turkish average. High school and equivalent vocational school graduates form the largest group with 1.44 million people, while the total number of primary and middle school graduates is around 1.7 million. The upward shift in education levels supports Ankara's supply of skilled labor, particularly in high value-added sectors.

Figure 7: Educational Attainment of Ankara's Population Aged 6+



Source: TÜİK, 2024.

Formal education indicators also support this trend. According to data from the Ministry of National Education, while a total of 1.58 million students were enrolled in Ankara in the 2022–2023 period, this number declined to 1.52 million in the 2023–2024 period. The decline in student numbers was particularly pronounced at the high school level; the number of high school students, which was 424,000 in 2022–2023, fell to 370,000 in 2023–2024. In contrast, the number of university students rose from 355,000 to 374,000. The data reveals that demand for higher education in Ankara continues to grow, while the number of students in primary education levels is declining due to demographic dynamics.

Table 3: Educational Institutions in Ankara – Ministry of National Education Statistics, Formal Education 2023/2024

	Number of Schools (Public, Private)		Number of Students	
	2022-2023	**2023-2024**	**2022-2023**	**2023-2024**
Preschool	2,445	2,445	125,091	120,691
Elementary School	889	895	341,070	337,383
Middle School	866	871	338,482	326,482
High School (General, vocational, technical)	899	890	424,339	370,004
University	21	21	355,048	374,022
Total	5,120	5,123	1,584,030	1,528,582

Source: Ministry of National Education, 2025.

Ankara is one of Turkey's strongest centers in the field of higher education, with a total of 21 universities and a broad education and research ecosystem. As of the 2024–2025 academic year, the number of students enrolled in universities under formal education was recorded as 704,763. This size makes Ankara the city with the highest university student density in Turkey after Istanbul.

Table 4. Vocational and Technical High School Statistics in Ankara (Public + Private), 2023–2024 Academic Year

District Name	Number of Institutions	Number of Branches	Number of Classrooms	Number of Students			Number of Teachers		
				Boys	Girls	Total	Male	Female	Total
Akyurt	6	79	75	870	656	**1,526**	78	61	**139**
Altındağ	35	633	689	9,083	6,074	**15,157**	580	837	**1,417**
Ayaş	2	17	44	159	68	**227**	17	27	**44**
Bala	5	24	50	157	128	**285**	18	41	**59**
Beypazarı	7	93	85	850	698	**1,548**	78	83	**161**
Çamlıdere	2	9	37	69	63	**132**	16	18	**34**
Çankaya	29	430	621	4,724	2,934	**7,658**	326	872	**1,198**
Stick	11	149	172	1,906	1,339	**3,245**	167	177	**344**
Elmadağ	7	77	146	764	425	**1,189**	64	80	**144**
Etimesgut	23	444	549	8,075	4,040	**12,115**	347	814	**1,161**
Universe	1	4	8	13	26	**39**	3	7	**10**
Gölbaşı	13	167	244	1,620	1,310	**2,930**	103	282	**385**
Güdül	1	9	13	84	53	**137**	12	6	**18**
Haymana	5	50	62	390	213	**603**	29	37	**66**
Kahramankazan	8	91	92	1,257	1,022	**2,279**	102	99	**201**
Kalecik	3	22	33	186	113	**299**	23	24	**47**
Keçiören	31	643	767	7,340	6,331	**13,671**	604	969	**1,573**
Kizilcahamam	6	56	81	750	285	**1,035**	54	67	**121**
Mamak	32	525	584	6,846	4,650	**11,496**	535	827	**1,362**
Nallıhan	4	45	50	326	171	**497**	24	37	**61**
Polatlı	11	160	194	2,311	1,254	**3,565**	157	201	**358**
Pursaklar	9	215	207	3,081	2,059	**5,140**	197	250	**447**
Sincan	31	620	704	10,163	7,044	**17,207**	612	936	**1,548**
Sereflikochisar	7	49	68	474	287	**761**	50	44	**94**
Yenimahalle	33	831	1,028	13,673	6,228	**19,901**	801	1,226	**2,027**
Total	**325**	**5,450**	**6,613**	**75,171**	**47,471**	**122,642**	**5,000**	**8,037**	**13,037**

Source: Ankara Provincial Directorate of National Education, 2025.

Vocational and technical high schools have significant capacity at the secondary education level in Ankara. As of the 2023–2024 academic year, a total of 325 vocational and technical high schools, 5,450 branches, and 6,613 classrooms provide education throughout the province; 122,642 students are enrolled in these schools. Approximately 61% of the students are male and 39% are female. The teaching staff consists of a total of 13,037 people, more than half of whom are female teachers. This table shows that vocational education has a strong presence in Ankara's educational structure.

Table 5: Universities in Ankara and Formal Student Numbers for the 2024–2025 Academic Year

No	University Name	Type	Number of Students		
			Male	Female	Total
1	Ankara Science University	Foundation	1,571	1,564	3,135
2	Ankara Hacı Bayram Veli University	State	11,703	16,151	27,854
3	Ankara Medipol University	Foundation	4,048	8,047	12,095
4	Ankara University of Music and Fine Arts	State	698	583	1,281
5	Ankara University of Social Sciences	State	2,512	3,498	6,010
6	Ankara University	State	43,274	47,124	90,398
7	Ankara Yıldırım Beyazıt University	State	11,088	15,578	26,666
8	Atılım University	Foundation	5,342	5,069	10,411
9	Capital University	Foundation	8,101	10,794	18,895
10	Çankaya University	Foundation	3,442	3,026	6,468
11	Gazi University	State	18,619	20,615	39,234
12	Hacettepe University	State	21,216	26,988	48,204
13	İhsan Doğramacı Bilkent University	Foundation	6,307	6,032	12,339
14	Lokman Hekim University	Foundation	1,412	3,521	4,933
15	Middle East Technical University	State	17,905	12,878	30,783
16	OSTIM Technical University	Foundation	5,977	2,194	8,171
17	TED University	Foundation	2,293	3,287	5,580
18	TOBB University of Economics and Technology	Foundation	2,808	2,780	5,588
19	Turkish Aeronautical Association University	Foundation	2,358	1,390	3,748
20	Ufuk University	Foundation	1,790	2,463	4,253
21	High Specialization University	Foundation	957	2,029	2,986
	Total		328,664	376,099	704,763

* Data for open education and distance learning are excluded.
Source: YÖK, 2025.

According to the data, approximately 72% of all students in Ankara attend public universities, while 28% attend foundation universities. This distribution shows that public universities play a dominant role in the capital's academic ecosystem, but foundation universities have also reached a significant capacity.

The top five universities in terms of student numbers are Ankara University (90,398 students), Hacettepe University (48,204 students), Gazi University (39,234 students), Middle East Technical University (30,783 students), and Ankara Hacı Bayram Veli University (27,854 students). These five universities together host approximately 236,000 students, accounting for more than one-third of Ankara's total student population. These institutions contribute directly to the urban economy not only through their educational capacities but also through their technology parks, research centers, and hospitals.

On the other hand, among private universities, Başkent University (18,895 students), İhsan Doğramacı Bilkent University (12,339 students), and Ankara Medipol University (12,095 students) stand out. These universities play a critical role in producing specialized human resources, particularly in the fields of health sciences, engineering, and social sciences.

Ankara's higher education capacity is noteworthy not only in terms of student numbers but also in terms of diversity. The city is home to universities specializing in arts, music, defense industry, health, engineering, and social sciences, making the capital a fertile ground for interdisciplinary research and innovative initiatives.

Education indicators clearly show that Ankara stands out with a higher level of education compared to the Turkish average. The decline in the number of high school students points to changing demand conditions in the labor market in the medium term, while the increase in university students strengthens the city's potential for a young and educated population. This situation supports Ankara's investment and promotion strategies to focus on sectors based on qualified human resources, making the city an attractive center, particularly in the fields of technology, information technology, health, and advanced services.

Labor Force Profile

Ankara's labor force structure largely parallels the Turkish average, but it also has some critical differences. As of 2024, Ankara's population aged 15 and over is 4.78 million, of which 2.56 million are part of the labor force. Thus, Ankara's labor force participation rate is 55%, which is above the Turkish average of 54.2%. The data shows that the capital's educated and urban population structure has a labor force participation rate slightly above the national average.

Table 6: Labor Force and Employment Structure in Ankara (2024)

	Ankara	Turkey
Population aged 15 and over	4,780,322	67,738,379
Employment (Thousand)	2,309	32,620
Employment Rate (%)	49.6	49.5
Labor Force (Thousand)	2,558	35,733
Not in the Labor Force (Thousand)	2,096	30,193
Labor Force Participation Rate (%)	55	54.2
Unemployed (Thousand)	249	3,113
Unemployment Rate (%)	9.7	8.7

Source: TÜİK, 2024.

The employed population in Ankara is 2.31 million, with an employment rate of 49.6%. The employment rate across Turkey was measured at 49.5%, meaning that the capital's employment performance remained at almost the same level as the country as a whole. However, the unemployment rate in Ankara stands at 9.7%, which is above the Turkish average (8.7%). In numerical terms, the number of unemployed people in Ankara is 249,000, while across Turkey it is 3.1 million.

This picture reveals that while Ankara performs above the Turkish average in terms of labor force participation, it is not as successful in its capacity to create employment. The high participation rate indicates that there is a large population seeking work in the capital; however, the fact that the unemployment rate is higher than the national average points to partial imbalances in the supply and demand of the existing labor market.

From a strategic perspective, Ankara's labor force structure stands out for three key characteristics:

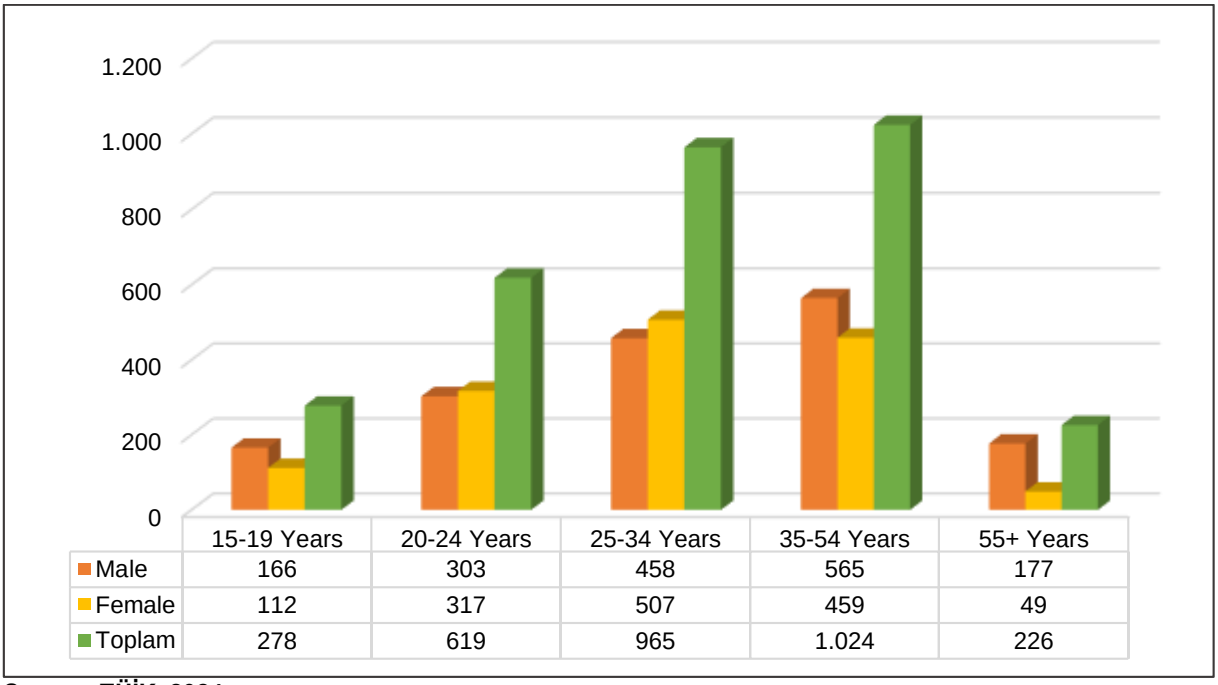
- High participation rate: The orientation of women and young people towards the labor market creates a participation level above the national average.

- Employment-unemployment balance: Despite the high participation rate, the unemployment rate remains above the Turkish average, indicating that sufficient employment opportunities for skilled labor have not been created.
- Urban-centered labor force structure: With relatively limited agricultural employment and a predominance of service and public sector employment, the structural composition of the labor force in the capital differs from the Turkish average.

Ankara's labor force profile, despite having a qualified human resource, necessitates the development of labor market adaptation and matching policies due to unemployment rates that are higher than the national average.

As of 2024, there are a total of 3.11 million unemployed people in Turkey. When the distribution of the unemployed population by age group is examined, 619,000 people are unemployed in the 20–24 age group, 965,000 people in the 25–34 age group, and 1.02 million people in the 35–54 age group. This table shows that unemployment is most critical among young adults entering the labor market after education and among the middle-aged group. The number of unemployed in the 15–19 age group is recorded as 278,000, and 226,000 in the over-55 age group.

Figure 8: Figure 8: Distribution of Unemployed Population in Türkiye by Age and Gender (Thousands) (2024)



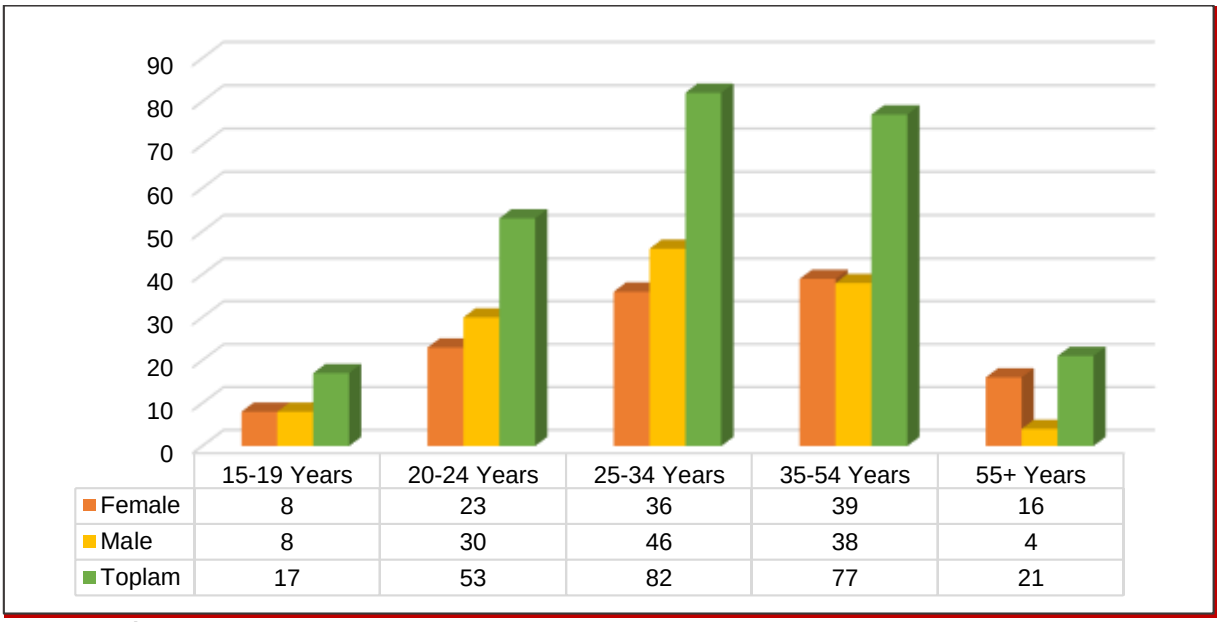
	15-19 Years	20-24 Years	25-34 Years	35-54 Years	55+ Years
Male	166	303	458	565	177
Female	112	317	507	459	49
Toplam	278	619	965	1.024	226

Source: TÜİK, 2024.

When evaluated by gender, female unemployment (317,000) exceeds male unemployment (303,000) in the 20–24 age group. In the 25–34 age group, female unemployment is higher than male unemployment (507,000 compared to 458,000). In contrast, in the 35–54 age group, male unemployment (565 thousand) exceeds female unemployment (459 thousand). The findings reveal that young women face more difficulties entering the labor market, while middle-aged men are at higher risk of losing their jobs.

In Ankara specifically, the total number of unemployed is 249,000, and the distribution by age group is similar to that of Turkey. In the capital, 53,000 unemployed people are in the 20-24 age group, 82,000 are in the 25-34 age group, and 77,000 are in the 35-54 age group. Therefore, the age group with the highest unemployment rate in Ankara is 25-34, accounting for more than one-third of the total unemployed population.

Figure 9: Distribution of Unemployed Population in Ankara by Age and Gender (Thousands) (2024)



	15-19 Years	20-24 Years	25-34 Years	35-54 Years	55+ Years
Female	8	23	36	39	16
Male	8	30	46	38	4
Toplam	17	53	82	77	21

Source: TÜİK, 2024.

When examining the gender distribution, female unemployment (30,000) in the 20–24 age group exceeds male unemployment (23,000) in Ankara. Female unemployment (46,000) is also higher than male unemployment (36,000) in the 25–34 age group. However, in the 35–54 age group, male unemployment (39,000) is almost equal to female unemployment (38,000). The number of unemployed people over the age of 55 is 21,000 in total, and the proportion of men in this age group is significantly higher.

Both in Turkey and in Ankara, unemployment is most critical among young adults aged 20–34 and the middle-aged population aged 35–54. The data points to the structural difficulties young people face in transitioning from education to the labor market and the difficulties the middle-aged population faces in re-entering employment. At the policy level, internships, on-the-job training, and entrepreneurship support to facilitate the transition for young people, and reskilling and cross-sector transition programs for middle-aged people are at the forefront.

When examining the distribution of the unemployed population by education level across Turkey as of 2024, it is seen that the majority of the unemployed are those with less than a high school education (1 million 128 thousand people) and high school and equivalent vocational school graduates (984 thousand people). The number of unemployed higher education graduates is recorded as 966 thousand people. This table shows that unemployment is high not only among those with low levels of education, but also among secondary and higher education graduates. It is noteworthy that the labor market in Turkey is struggling to create employment opportunities that match the qualifications of the increasing number of higher education graduates. The number of unemployed people who cannot read or write is limited, accounting for only 35,000 people of the total.

Table 7: Distribution of Unemployed Population by Educational Status (Thousands) (2024)

	Ankara	Turkey
Illiterate	2	35
Those with Less Than a High School Education	70	1128
High School and Equivalent Vocational School	77	984
Higher Education	100	966

Source: TÜİK, 2024.

The distribution of the unemployed population by education level in Ankara is similar to that of Turkey as a whole, but there are some differences. Of the total 249,000 unemployed in the capital, approximately 100,000 are higher education graduates, 77,000 are high school and equivalent vocational school graduates, and 70,000 have less than a high school education. The number of unemployed individuals who are illiterate is quite limited, at only 2,000. The high proportion of higher education graduates among the unemployed in Ankara indicates that the capital's skilled workforce is not sufficiently represented in employment.

From a strategic perspective, it can be seen that unemployment in Ankara, as in Turkey as a whole, is concentrated among both low and high levels of education. However, Ankara stands out in that unemployment among university graduates is higher. The findings reveal that university graduates in the capital struggle to find jobs commensurate with their qualifications in the labor market, with the supply-demand imbalance being more pronounced, especially for young graduates.

This picture has a dual meaning for Ankara's investment and promotion strategy. Thanks to its supply of highly educated labor, the capital offers strong potential for skilled sectors such as advanced technology, information technology, health, and finance. However, the failure to fully exploit this potential leads to increased unemployment among higher education graduates and necessitates the development of structural employment policies.

The capacity of vocational and technical high schools in Ankara stands out as a strategic element directly linked to the labor market. According to data from the 2023–2024 academic year, a total of 325 vocational and technical high schools operate across the province, with 122,642 students enrolled in these institutions. The districts with the highest number of students are Yenimahalle (19,901), Sincan (17,207), Altındağ (15,157), Keçiören (13,671), and Etimesgut (12,115). These districts also coincide with areas where the industrial and service sectors are concentrated.

Boys make up 61% of the students, while girls make up 39%. This gender distribution shows that vocational education is more intensively preferred by male students. However, the presence of female students, especially in the fields of health, child development, and services, supports Ankara's sectoral workforce diversity.

From a strategic perspective, vocational education capacity in Ankara is directly linked to the industrial and service sectors. Considering the capital's density of organized industrial zones, defense industry clusters, and rapidly growing health-IT ecosystem, the young population graduating from vocational and technical high schools will play a critical role in meeting the labor market's need for skilled intermediate personnel. For this structure to function effectively, cooperation between vocational education and the sectors must be strengthened.

Labor force statistics for the 2015–2024 period across Turkey show that employment is increasingly shifting toward a service sector-dominated structure. While 52.2% of total employment was in services, 27.2% in industry, and 20.6% in agriculture in 2015, this distribution was 57.9% services, 27.3% industry, and 14.8% agriculture in 2024. This table shows that agriculture's share of employment has declined by approximately 6 points in 10 years, while services have risen by a similar amount. Industry's share has remained relatively stable, staying in the 26–28% range after 2016.

Table 8: Employment by Sector in Türkiye

Years	Thousands (000)				Percentage (%)			
	Total employment	Agriculture	Industry (*)	Services	Total	Agriculture	Industry (*)	Services
2015	26,621	5,483	7,246	13,891	100	20.6	27.2	52.2
2016	27,205	5,305	7,283	14,617	100	19.5	26.8	53.7
2017	28,189	5,464	7,478	15,246	100	19.4	26.5	54.1
2018	28,738	5,297	7,667	15,774	100	18.4	26.7	54.9
2019	28,080	5,097	7,110	15,872	100	18.2	25.3	56.5
2020*	26,812	4,716	7,036	15,060	100	17.6	26.2	56.2
2021	28,797	4,948	7,921	15,928	100	17.2	27.5	55.3
2022	30,752	4,866	8,509	17,378	100	15.8	27.7	56.5
2023	31,632	4,695	8,708	18,230	100	14.8	27.5	57.6
2024	32,620	4,827	8,908	18,886	100	14.8	27.3	57.9

(*) The construction sector has been evaluated within the industrial sector.
*Due to regulatory changes in 2020, it is not comparable with previous years.
Source: TÜİK, 2024.

The growing importance of services in Turkey is consistent with the increasing supply of educated labor in urban centers and digitalization trends. Conversely, the decline in agriculture reflects the decrease in rural employment and the productivity-focused transformation process. The stagnation of industrial employment indicates that, despite the increase in value added in production, the capacity to create employment remains limited.

In Ankara specifically, the sectoral distribution has shifted more sharply in favor of services than the Turkish average. In 2015, 71.9% of total employment was in services, 24.5% in industry, and only 3.6% in agriculture. By 2024, this distribution was 69.9% services, 25.8% industry, and 4.4% agriculture. This table shows that Ankara's agricultural employment is well below the national average and that its employment structure is almost entirely determined by urban sectors.

Table 9: Employment by Sector in Ankara

Years	Thousands (000)				Percentage (%)			
	Total employment	Agriculture	Industry (*)	Services	Total	Agriculture	Industry (*)	Services
2015	1,833	66	448	1,319	100	3.6	24.5	71.9
2016	1,908	68	469	1,372	100	3.5	24.6	71.9
2017	1,960	63	462	1,434	100	3.2	23.6	73.2
2018	1,999	75	470	1,455	100	3.7	23.5	72.8
2019	1,946	67	413	1,466	100	3.5	21.2	75.3

2020*	1,880	60	442	1,379	100	3.2	23.5	73.3
2021	2,027	76	497	1,454	100	3.8	24.5	71.7
2022	2,147	67	546	1,534	100	3.1	25.4	71.4
2023	2,226	85	588	1,552	100	3.8	26.4	69.7
2024	2,309	101	595	1,614	100	4.4	25.8	69.9

(*) The construction sector has been evaluated within the industrial sector.
*Due to regulatory changes in 2020, it is not comparable with previous years.
Source: TÜİK, 2024.

The rise in unemployment rates between 2019 and 2021 parallels fluctuations in industrial employment. Due to the pandemic, industrial employment fell to 23.5% in 2020, while services rose to 73.3%. In the recovery after 2021, industry rose above 25% again, while a relative contraction was observed in services. As of 2024, approximately 1.61 million people, or 70% of Ankara's employment, are in services, 595,000 people, or a quarter, are in industry, and only 101,000 people, or 4.4%, are in agriculture.

Ankara's sectoral employment structure exhibits three key characteristics:

- Service-oriented structure: The capital has a strong employment capacity in areas such as public administration, education, health, finance, and advanced services. Findings indicate that it is a major draw for highly educated workers.
- Stable share in industry: Industry maintains a permanent weight of around 25% in Ankara's employment. The defense industry, advanced manufacturing, and organized industrial zones, in particular, support this structure.
- Limited agricultural employment: Agriculture accounts for only 4% of Ankara's employment and does not play a decisive role outside rural districts. The data confirms that the city's economic structure is largely based on the industrial and service sectors.

Ankara's sectoral employment structure reflects Turkey's transformation trend in an accelerated manner. The limited share of agriculture and the dominance of services make the city a strategic center for high value-added production and knowledge-intensive services. However, this structure also increases the importance of innovative investments in industry and the matching of skilled labor in services.

Social Infrastructure

Social infrastructure is one of the most critical components that determines not only a city's quality of life but also the attractiveness of its investment environment and the sustainability of its human capital. A wide range of services, from healthcare to cultural events, educational institutions to exhibition and conference infrastructure, directly affects both the livability of cities for local residents and their appeal to national and international investors. In Ankara specifically, social infrastructure, combined with the central location provided by its capital city status and strong public institution support, makes the city not only an administrative but also an economic, cultural, and social center. Therefore, a comprehensive assessment of social infrastructure forms a fundamental basis for Ankara's investment and promotion strategy.

Ankara is one of Turkey's strongest provinces in terms of healthcare capacity. As of 2023, there are a total of 85 hospitals in Ankara, offering a capacity of 25,020 beds. Considering that there are 266,594 beds in 1,566 hospitals across Turkey, Ankara alone accounts for approximately 9.4% of the country's capacity. In terms of beds per capita, Ankara also significantly exceeds the Turkish average of 312 beds, with 431 beds per 100,000 people. The analysis shows that Ankara's healthcare infrastructure stands out nationally in terms of both quantity and accessibility.

Table 10: Health Indicators for Ankara (2023)

		Ankara	Turkey
Total Number of Physicians per 1,000 People		4.3	2.4
Number of Hospitals		85	1,566
Number of Hospital Beds		25,020	266,594
Number of Healthcare Personnel	Specialist Physician	11,547	101,233
	General Practitioner	3,183	54,899
	Resident Physician	10,085	48,091
	Dentist	4,606	45,718
	Nurse	23,298	248,287
	Midwife	3,888	59,750
	Pharmacist	3,408	40,610
	Other Healthcare Personnel	20,883	266,217
Total Hospital Beds per 100,000 People		431	312

Source: TÜİK, 2023.

In terms of physician supply, the total number of physicians per thousand people in Ankara is 4.3, which is almost double the Turkish average of 2.4. There are 11,547 specialist physicians, 3,183 general practitioners, and 10,085 assistant physicians, demonstrating that Ankara's healthcare system has a very strong capacity for specialization and academic education. In addition, there are 4,606 dentists and 3,408 pharmacists working in Ankara, with 23,298 nurses supporting the physician staff. The total number of healthcare personnel exceeds 80,000, and this number increases further when other support personnel are included.

Another indicator of the high level of access to healthcare services in Ankara is the number of visits per physician, which stands at 4,767. This figure indicates that the healthcare system in the capital has a strong capacity not only in terms of the number of beds and physicians but also in terms of actual service delivery. This strong healthcare infrastructure enables Ankara to gain a competitive advantage at the national and international level in terms of medical tourism, medical device investments, and biotechnology ventures.

Ankara is one of Turkey's leading cultural centers in terms of its library, museum, cinema, and theater capacity. An analysis of data from the 2020–2024 period shows that the city's cultural infrastructure is undergoing continuous development in both quantitative and qualitative terms.

Table 11: Public Library Statistics for Ankara (2024)

	Ankara	Turkey
Number of Public Libraries	76	1,301
Number of Users in Public Libraries	1,008,906	38,737,705
Number of Users Per 1,000 People in Public Libraries	172	452

Source: TÜİK, 2024.

As of 2024, there are 76 public libraries in Ankara, accounting for 6% of the 1,301 libraries across Turkey. The number of users benefiting from public libraries reached 1.0 million, with a usage rate of 172 per 1,000 people. Although this rate is below the Turkish average of 452, considering the density of university and research libraries in Ankara, it can be said that library usage occurs through different channels.

Table 12: Museum and Visitor Statistics for Ankara (2023)

	Ankara	Turkey
Number of Museums Affiliated with the Ministry of Culture and Tourism	8	212
Number of Visitors to Museums Affiliated with the Ministry of Culture and Tourism	1,544,788	30,488,975
Number of Archaeological Sites	2	144
Number of Private Museums	58	376
Number of Visitors to Private Museums	2,228,191	18,236,130

Source: TÜİK, 2023.

There are 8 museums affiliated with the Ministry of Culture and Tourism in Ankara, and as of 2023, these museums have been visited by 1.5 million visitors. In addition, the number of private museums has increased to 58, with 2.2 million visitors. In total, approximately 3.7 million visitors benefited from Ankara's museum infrastructure. This figure highlights the high cultural tourism potential of the capital and the critical role museums play in city branding.

Table 13: Cinema Statistics for Ankara (2024)

	Ankara	Turkey
Number of Films	578	-
Number of Seats	36,182	317,274
Number of Halls	278	2,776
Number of Spectators	3,414,424	32,538,289

Source: TÜİK, 2024.

As of 2024, there are 278 movie theaters in Ankara with a total seating capacity of 36,182. Over the course of a year, 578 films were screened in these theaters, and 3.4 million viewers attended cinema events. There was a rapid recovery in audience numbers after the pandemic, with the number of viewers reaching 3.4 million in 2024, compared to 4.1 million in 2022. Ankara has 10% of the total number of movie theaters in Turkey, making it one of the important centers of cinema culture.

Table 14: Theatre Statistics for Ankara (2024)

	Ankara	Turkey
Number of Productions	537	9,744
Number of Performances	4,060	35,403
Number of Seats	34,951	431,631
Number of Spectators	890,244	8,053,186
Number of Theater Halls	81	1,025

Source: TÜİK, 2024.

Ankara also holds a strong position in terms of theater stages. As of 2024, there are 81 theater halls operating in the city, where 537 plays have been staged, 4,060 performances have been organized, and a total of 890,000 spectators have attended theater events. While the total number of spectators across Turkey is around 8 million, Ankara alone accounts for 11% of this total. These findings reflect the capital's deep-rooted tradition in theater culture.

An examination of the 2023 trade fair statistics for Turkey reveals that sectors such as food and beverage technologies, agriculture–horticulture–livestock, ready-to-wear clothing and textiles, furniture, education

technologies, defense, and medical devices have gained prominence in the trade fair calendar. These sectors are the driving force of the fair economy with their high number of participants and visitors, while also coinciding with areas where Turkey's export potential is concentrated. Therefore, Ankara's fair strategy being in line with these national trends will provide a critical advantage in terms of both the vitality of the city's economy and international competitiveness.

Table 15: Fair and Exhibition Statistics (2023)

		Number of Exhibitions Held	Total Number of Fair Participants	Number of Foreign Country Participants	Number of Direct Foreign Participants	Number of Indirect Foreign Participants	Total Number of Visitors	Number of Foreign Visitors	Total Booth Area Allocated to Participants (Net / m2)	Total Stand Area Allocated to Direct Foreign Participants (Net / m2)	Total Booth Area Allocated to Indirect Foreign Participants (Net / m²)
1	Istanbul	186	47,364	2,755	11,297	7,061	4,547,258	688,647	2,006,853	210,407	230,012
2	Izmir	40	5,241	258	530	575	2,282,293	53,451	308,538	13,601	26,072
3	Antalya	37	16,841	249	467	434	1,757,428	45,873	213,288	11,669	14,685
4	**Ankara**	**31**	**8,810**	**301**	**703**	**210**	**1,547,165**	**17,874**	**134,903**	**9,728**	**18,552**
5	Bursa	14	1,389	56	13	173	690,670	7,829	99,660	77	9,156
6	Adana	13	413,171	24	16	43	1,173,200	3,025	58,839	20	2,455
7	Denizli	11	677	11	15	49	816,591	218	65,738	210	8,425
8	Mersin	10	380	2	3	11	122,599	2,623	24,873	42	576
9	Van	10	700	7	15	6	285,813	3,692	46,648	700	190
10	Gaziantep	8	686	19	24	22	123,372	3,174	58,580	3,174	1,710
Turkey Total		**456**	**503,667**	**3,797**	**13,167**	**8,962**	**21,509,304**	**902,096**	**3,734,958**	**251,868**	**353,261**

Source: TOBB, 2023.

Ankara is also one of Turkey's main centers for trade fair and congress events. In 2023, 31 trade fairs were held in Ankara; 8,810 participants took part in these events, and the total number of visitors was 1,547,165. Of the visitors, 17,874 were foreign. The net stand area allocated to participants was 134,903 m², of which 9,728 m² was allocated to direct foreign participants and 18,552 m² to indirect foreign participants.

In the national ranking, Ankara ranks 4th in terms of the number of fairs (Istanbul 186, Izmir 40, Antalya 37, Ankara 31) and 4th in terms of visitor numbers (Istanbul 4.55 million; Izmir 2.28 million; Antalya 1.76 million; Ankara 1.55 million). Ankara is also among the top four in terms of foreign visitor numbers, following Istanbul, Izmir, and Antalya. This table shows that Ankara's exhibition infrastructure is above the national average in terms of scale and accessibility, but its level of internationalization (share of foreign visitors/participants) lags behind Istanbul and tourism-focused cities.

Ankara's exhibition infrastructure has proven its ability to successfully host large-scale commercial events with its high total visitor volume and extensive stand space. The city's specialization in defense and aviation, machinery and manufacturing, health and biotechnology, and education creates a natural foundation for the development of specialized exhibitions. However, the relatively low rate of foreign

participants and visitors stands out as an important area for development. In this regard, expanding the portfolio of international specialized fairs, strengthening connections to Esenboğa Airport, and more effectively structuring the city's MICE logistics (accommodation, transportation, and venue management) are critical needs.

Strategically, it is important to attract global networked exhibitions in Ankara in the areas of defense and advanced manufacturing, health and biotechnology, digital gaming, and agricultural technologies; to develop incentives for foreign participants and B2B matching programs; and to plan the congress and exhibition calendar in line with Ankara's academic calendar and industry clusters. Furthermore, aligning Ankara's position as the "technology and public capital" with fair themes in city branding will be a strategic move to increase the city's international fair appeal.

Ankara's social welfare level indicates a relatively more advantageous position when compared to Turkey as a whole. According to TÜİK data, in 2024, the number of poor people in Ankara at the 50% poverty risk threshold will be 634,500, which corresponds to 11.1% of the total population. The same rate for Turkey as a whole is 13.6%. The data shows that although Ankara has significant socioeconomic differences on a metropolitan scale, it has a poverty rate below the national average.

Table 16: Poverty Statistics (2024)

	Number of Poor (Thousand People)		Poverty Rate (%)		Poverty Threshold (TL)	
	Ankara	Turkey	Ankara	Turkey	Ankara	Turkey
Poverty risk: 40%	-	5,820.7	-	6.92	-	54,494.9
Poverty risk: 50%	634.5	11,457.4	11.12	13.62	87,872.4	68,118.6
Poverty risk: 60%	1,121.2	17,821.4	19.65	21.18	105,446.9	81,742.3
Poverty risk: 70%	-	24,318.3	-	28.91	-	95,366.1

Source: TÜİK, 2024.

Poverty line data also reveals the relatively high cost of living in the capital. While the poverty line in Ankara is 87,872 TL at a 50% risk threshold, the Turkish average is 68,118 TL. Similarly, at the 60% risk threshold, the threshold in Ankara is calculated as 105,447 TL, while it is 81,742 TL across Turkey. This difference shows that the cost of living for households in the capital is well above the national average; therefore, the level of well-being should be assessed not only in terms of income but also in terms of the cost of living.

In Ankara, approximately one-fifth of the population (1.1 million people) is considered poor at the 60% poverty risk threshold. Although this rate is below the Turkish average of 21.2%, it is still a significant figure for the capital. The risk of poverty is felt more intensely in the city center, particularly due to high housing and basic consumption expenses; this situation increases the importance of social policies and supportive local services.

Ankara has maintained its status as a center of attraction by achieving consistently positive net migration values during the 2020–2024 period. Net migration, which was 11,997 people in 2020, rose to 52,029 people in 2024, while the net migration rate increased from 2.12% to 8.91%. The figures show that Ankara is a city that attracts migrants due to both its economic opportunities and its central role in higher education, public administration, and the service sector.

Table 17: Migration Data for Ankara by Year

	Migration Data by Region	Net Migration Data by Region	Net Migration Rate Data by Region	Migrants Sent by Regions
2020	153,162	11,997	2.12	141,165
2021	197,702	32,098	5.6	165,604
2022	189,104	27,192	4.71	161,912
2023	232,700	23,960	4.14	208,740
2024	202,402	52,029	8.91	150,373

Source: TÜİK, 2025.

Immigration peaked in 2021 with 197,000 people, reached its highest level in 2023 with 232,000 people, and stood at 202,000 in 2024. Although emigration reached a high level of 208,000 people in 2023, it declined to 150,000 people in 2024, leading to a significant increase in net migration. This table shows that Ankara has recently strengthened its capacity to attract young and skilled people.

An examination of education status data provides a clearer picture of the quality of migration to Ankara. As of 2024, university graduates (faculty and college) numbered 58,843, while high school and vocational school graduates numbered 65,489 among the population migrating to Ankara. The findings show that Ankara attracts both university graduates and a workforce with vocational and technical education. Furthermore, the total number of migrants with master's and doctoral degrees exceeds 10,000. This number confirms that Ankara is a center of attraction in terms of its academic and research centers and high-quality human resources.

Table 18: Educational Background of Migrants Leaving Ankara (2024)

	Educational Profile of Migrants Coming to Ankara	Educational Profile of Migrants Leaving Ankara
Illiterate	1,862	1,069
Literate but did not complete school	10,561	7,586
Elementary school	19,374	12,116
Primary education	5,614	3,519
Middle School or Equivalent Vocational Middle School	19,019	12,387
High School or Equivalent Vocational School	65,489	49,120
College or Faculty	58,843	46,619
Master's Degree (Including 5- or 6-Year Faculties)	9,066	7,428
Doctorate	937	1,066
Unknown	473	370

Source: TÜİK, 2024.

Looking at the educational profile of the emigrating population, the picture shows that Ankara maintains its advantage. Among those leaving the city, high school graduates (49,120 people) and university graduates (46,619 people) account for the highest share. However, the number of higher education graduates coming to Ankara is approximately 12,000 more than those leaving. Similarly, Ankara also benefits from postgraduate (master's/doctorate) migration. These findings show that Ankara has strengthened its capacity to attract educated and skilled human resources.

However, it is also noteworthy that the number of migrants at the primary and secondary school levels (over 38,000 in total) is significant. This group is more closely associated with family migration and employment diversity. The fact that the illiterate population has a very limited weight in migration movements reveals that migration to Ankara generally exhibits a high educational profile.

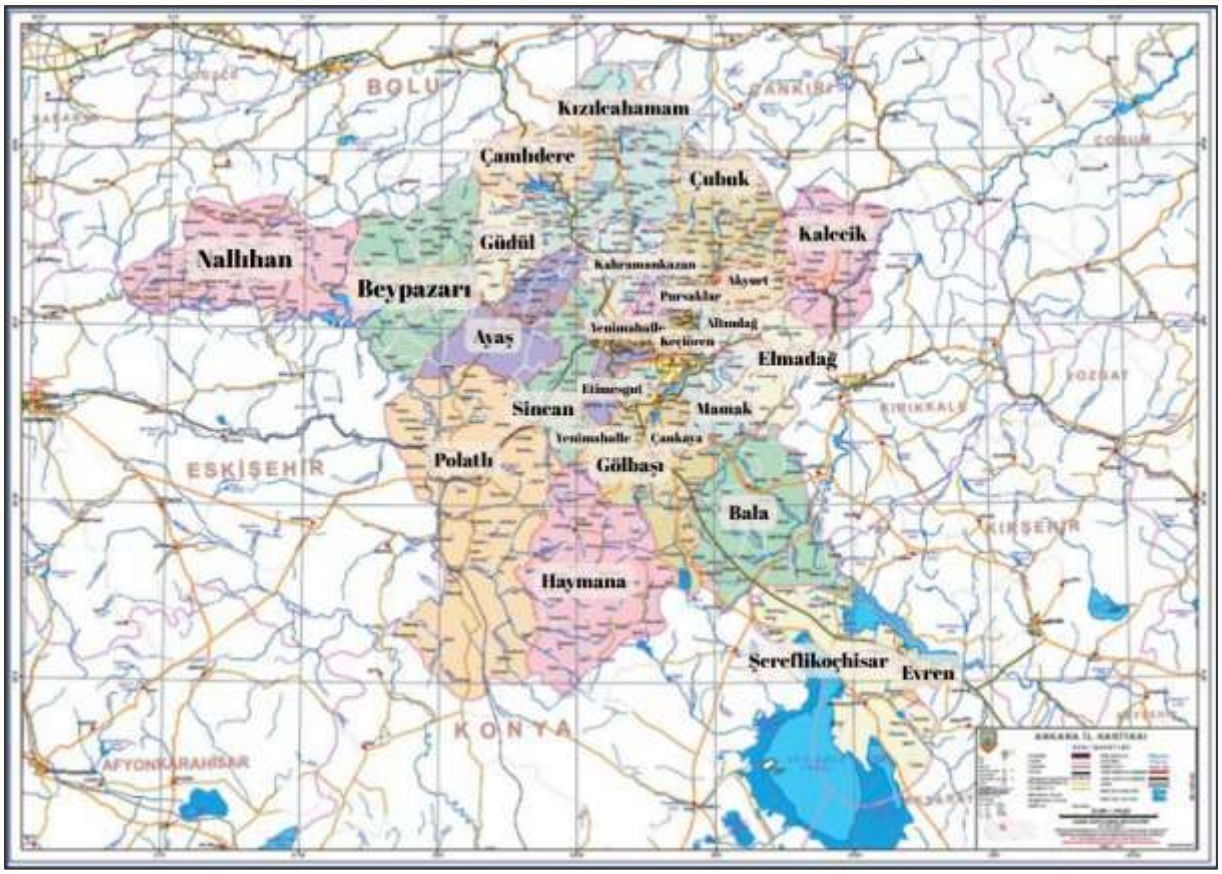
Ankara's migration data reveals that the city is particularly profitable in terms of higher education and postgraduate graduates. The emerging trend shows that the capital has a strong human capital advantage for knowledge economy, R&D, and innovation-based investments. The significant share of vocational and technical high school graduates in migration is a factor that supports the supply of qualified intermediate personnel for the industrial and service sectors. However, in order to sustainably leverage this potential, it is critically important to effectively employ the skilled population arriving through migration in the labor market, strengthen sector-employment alignment, and improve quality of life indicators (housing, transportation, social services).

When Ankara's social infrastructure is evaluated holistically, the city stands out in terms of scale and expertise in healthcare services, diversity and accessibility in cultural infrastructure, potential in the exhibition-congress ecosystem, and the attraction of skilled labor in migration dynamics. These indicators reveal that the capital is not only the center of public administration but also offers a strong investment and living environment for health tourism, medical technology, culture and creative industries, meetings-incentives-conferences-exhibitions (MICE) tourism, and R&D-focused sectors. However, high living costs, the limited share of foreign visitors, and the risks that may arise in the employment-living conditions balance of skilled labor are areas that need to be carefully managed in terms of the sustainability of social infrastructure. Therefore, in Ankara's investment and promotion strategy, social infrastructure should be positioned as a strategic priority, both as the fundamental basis of international competitive advantage and for maintaining the balance between quality of life and economic attractiveness.

2.3. District-Level Overview

Ankara is the capital of Turkey and its second most populous province. It has a multi-layered structure consisting of 25 districts. Altındağ, Çankaya, Etimesgut, Keçiören, Mamak, Sincan, and Yenimahalle, which form the center of the city, stand out in terms of population density as well as their administrative, economic, and social functions. The central districts are focal points for public institutions, universities, healthcare facilities, trade and service centers, as well as industrial and logistics infrastructure, determining Ankara's appeal. The surrounding and rural districts complement the city's economic diversity through agricultural production, natural resources, tourism, and cultural heritage.

Figure 10: Administrative Map of Ankara Province



Source: Prepared from the Provincial Map of the General Directorate of Mapping, 2025.

This section examines Ankara's 25 districts in terms of their demographic structure, geographical location, socio-economic development level, education indicators, sectoral employment structure, and investment potential. The analyses reveal the differences in development between districts, clarifying the center-periphery divide and making the spatial dimension of the province's investment ecosystem visible. The assessments are accompanied by SEGE data, population and education indicators, and the distribution of employment under the 4A–4B–4C categories; tables and maps provide a comparative reading.

Akyurt

Akyurt is located 33 km from the city center of Ankara and is one of the developing districts of the city with a population of 44,541, an area of 372 km², and an altitude of 960 meters. Men make up 49.7% of the district's population, while women make up 50.3%. Located in the Upper Sakarya section of the Central Anatolia Region, the district is surrounded by Kalecik to the east, Çubuk to the west and northwest, Pursaklar to the southwest, Altındağ to the south, and Elmadağ to the southeast. Located southeast of the Çubuk Plain and west of Mount İdris, Akyurt is a settlement with distinct continental climate characteristics. Summers are hot and dry, while winters are cold and harsh. The natural landscape consists mainly of steppe, with some scrubland and forest areas. With a history dating back to the Paleolithic Age, Akyurt bears traces from the Roman and Seljuk periods and stands out in Ottoman history for its strategic location during the Battle of Ankara and the War of Independence.

Economically, Akyurt is one of Ankara's important industrial centers. The district's economy has historically been based on agriculture and animal husbandry, but since the 1990s, it has become production-oriented with the increase in industrial investments. Approximately 300 industrial establishments operating in the electronics, food, logistics, textile, automotive, electrical, and furniture

sectors are located in the district and are organized under the umbrella of the Akyurt Industrialists and Business People Association (AKSİAD). Investments by companies such as Ülker, ASELSAN, MAN, CASA, Yakupoğlu, Nabay, and Nurus have turned the district into a strong production and export center. As a result of these activities, the district's daytime population exceeds 50,000, providing employment to approximately 30,000 people and generating hundreds of millions of dollars in exports. The International Esenboğa Airport located within the district boundaries, the ongoing construction of an exhibition area, and completed transportation investments contribute to Akyurt's emergence as a center with high investment potential in Ankara and Turkey.

Altındağ

Altındağ is located just 1 km from the center of Ankara and has a population of 414,893, an area of 573 km², and an altitude of 850 meters. Of the district's population, 50.1% are male and 49.9% are female. Located in the Upper Sakarya section of the Central Anatolia Region, Altındağ is surrounded by Çubuk and Pursaklar to the north, Keçiören and Yenimahalle to the west, Mamak to the south, Çankaya to the southwest, and Akyurt and Elmadağ to the east. Located in the rugged terrain between the Ankara Plain, Çubuk, and Akıncı Plain, the district exhibits all the characteristics of a continental climate. Altındağ stands out for being home to the historical core of Ankara and is considered one of Anatolia's most important cultural centers with a settlement history dating back to the Paleolithic Age. Ankara Castle, the Roman Baths, the Temple of Augustus, the Column of Julianus, Hacı Bayram Mosque, and the restored Ankara houses in Hamamönü are powerful representatives of the district's historical heritage.

Economically, Altındağ, which in the past had a structure based on agriculture and trade, has now become a center where industry and small-scale production activities prevail. Food, furniture, textiles, building materials, and small industries stand out in the district, while animal husbandry also has a certain share in the economy. However, Altındağ's real strategic value in Ankara and Turkey as a whole is focused on culture and tourism. Nationally important institutions such as the Museum of Anatolian Civilizations, the Ethnography Museum, the Republic and War of Independence Museums, and the Rahmi Koç Museum are located in the district. Furthermore, the Hacı Bayram Veli Tomb, historic mosques, inns, and monuments make Altındağ one of Ankara's cultural and tourist attractions. Thanks to its historical fabric, central location, and rich cultural heritage, Altındağ is a district that shapes the city's identity and has high potential for tourism-focused investments.

Ayaş

Ayaş is located 58 km from the city center of Ankara, with an area of 1,158 km² and an altitude of 1,500 meters, in the northwest of the city. The district has a total population of 13,670, of which 52.7% are male (7,206 people) and 47.3% are female (6,464 people). It is bordered by Sincan and Kahramankazan to the east, Beypazarı to the west, Güdül and Kızılcahamam to the north, and Polatlı to the south. Notable for its rugged terrain and mountain ranges stretching north to south, Ayaş exhibits typical characteristics of a continental climate. The district's history dates back to the Paleolithic Age. It was known as Mnizos during the Byzantine period and retained its importance during the Roman and Seljuk periods due to its strategic location. The district, which gained its Turkish identity with the settlement of the Oğuz tribes, is culturally rich with its historic mosques, ancient monuments, healing waters, and monumental trees. The Ayaş hot springs and mineral waters have stood out as an important health center throughout history due to their mineral and radioactive properties.

With an economy based on agriculture and animal husbandry, Ayaş is one of Ankara's leading centers for agricultural production. The Ayaş tomato, a brand-name product of the district, has significant potential both for fresh consumption and in the processed food industry (tomato paste, tarhana). In addition, mulberry production and molasses are among the traditional products in the regional economy, standing out as cultural and economic assets with the annual Mulberry Festival. Among agricultural products, cereals (wheat, barley, rye, oats), sugar beet, potatoes, onions, sunflowers, legumes, and fruit

growing are prominent, while viticulture is one of the district's traditional production activities. Ayaş's healing hot springs, natural beauty, and agricultural production potential make the district a strategic investment area for Ankara in terms of health tourism and agro-tourism.

Bala

Bala is located 69 km from the city center of Ankara, with an area of 2,372 km² and an altitude of 1,350 meters, in the south of the city. The district has a total population of 21,893, of which 54.7% are male (11,973) and 45.3% are female (9,920). Bala, surrounded by Kaman district of Kırşehir and Karakeçili district of Kırıkkale to the east, Haymana and Gölbaşı to the west, Şereflikoçhisar to the south, and Elmadağ to the north, is one of the oldest settlements in Ankara with its historical past. The district got its name from the Hamidiye settlement formed by Caucasian immigrants who settled in the region after the Ottoman-Russian War, which came to be known as Bala over time. Beynam Forests and Kesikköprü Dam are among the district's natural riches, with Beynam Forests in particular forming one of Ankara's important recreational areas with its natural site status and rich flora and fauna.

With an economy largely based on agriculture and animal husbandry, Bala also stands out for its cultural richness. There are extensive agricultural areas within the district boundaries; products such as wheat, barley, lentils, chickpeas, beans, sunflowers, sugar beets, melons, and watermelons are widely produced. In addition, small-scale workshops and activities related to the processing of agricultural products contribute to the economy. The traditional "Harvest Festival" supports agricultural production and farmer awareness, reinforcing Bala's agricultural identity. Bala, where the Turkmen/Abdal culture is intensely lived, is one of Anatolia's important cultural centers with its folk music, halay tradition, drum and pipe performances, and local folk songs. This cultural heritage, combined with local culinary values and natural riches, makes Bala a district with high potential in terms of both rural development and cultural tourism.

Beypazarı

Beypazarı is located 99 km from the city center of Ankara, with a population of 48,445, an area of 1,868 km², and an altitude of 675 meters, situated in the northwest of the city. The district's population consists of 49.7% men (24,065 people) and 50.3% women (24,380 people). , located on the historic Silk Road route, has a deep-rooted history bearing traces of the Hittite, Phrygian, Galatian, Roman, Byzantine, Seljuk, and Ottoman civilizations. The district has been given different names throughout history, such as Lagania and Anastasiopolis, and acquired its current name thanks to the large market established during the Germiyanoğulları period. The Inözü Valley, Eğriova Plateau, Kirmir Creek, and Dutlu Tahtalı Hot Springs constitute the district's important natural resources, while Seljuk and Ottoman monuments, historic Beypazarı houses, mosques, inns, and museums make the district stand out culturally.

Beypazarı's economy is based on agriculture, animal husbandry, trade, handicrafts, and industry. Agricultural production is strong in the district, and it is one of Turkey's leading centers for carrot production. In addition, spinach, turnip, onion, rice, and fruit cultivation are also prominent. Ankara goat breeding and poultry farming are important sources of income in the livestock sector. Agriculture-based industrial establishments operating in the district, such as Beypi A.Ş. and Beyyem A.Ş., attract attention with both their production capacity and contribution to employment. Furthermore, handicrafts such as copperwork, filigree silverwork, weaving, and carpentry support the district's cultural and economic identity; Beypazarı silver products are exported to international markets. With its historic houses, local cuisine, and natural and cultural riches, Beypazarı is one of Ankara's most important tourism-oriented districts and has high investment potential in terms of health tourism and cultural tourism.

Çamlıdere

Çamlıdere is located 108 km from the city center of Ankara, with an area of 650 km² and an altitude of 1,175 m in the northwest of the province. The total population is 13,971; men account for 53.7% (≈7,502 people) and women account for 46.3% (≈6,469 people). Surrounded by Kızılcahamam to the east and north, Gerede and Beypazarı to the west, and Güdül to the south, the settlement is located in the transition zone between Central Anatolia and the Western Black Sea, exhibiting continental climate characteristics with cool summers and snowy/rainy winters. It is characterized by rugged and mountainous topography, extensive forests, and plateaus; in addition to the predominantly pine and oak vegetation, Aluçdağı and Çamkoru National Parks, the Bayındır Dam basin, and migratory bird routes enhance the ecological value of the natural environment. The settlement history can be traced back to Seljuk and Byzantine traces; the Tomb of Sheikh Ali Semerkandi is a strong focus of faith tourism.

The economic and sectoral outlook highlights the multifaceted tourism potential based on natural and cultural capital. While the network of museums (Nature and Animal Museum, Culture House, Agriculture Museum, Sheikh Ali Semerkandi Museum, etc.) diversifies visitor demand around the axes of religious, cultural, nature, and thermal tourism, Activities such as camping/nature sports, photography, hiking, and youth camps in Aluçdağı and Çamkoru show a tendency to spread throughout the year. Forest resources form an important basis for the development of recreation and ecotourism products; the role of Bayındır Dam in urban water supply is a strategic infrastructure element at the provincial level. The preservation of cultural heritage and the revitalization of local life through festivals and events offer opportunities to combine rural development with tourism investments; transportation accessibility (E-5 and TEM connections, regular bus services to Ankara) is a complementary advantage that increases the destination's competitiveness.

Çankaya

Çankaya is one of the largest districts of the city, located 3 km from the center of Ankara, with an area of 1,157 km² and an elevation of 870 m. The district has a population of 947,330, of which 47.9% are male (452,771 people) and 52.1% are female (494,559 people). Bordered by Mamak and Altındağ to the east, Gölbaşı to the south, and Yenimahalle to the west, Çankaya has a continental climate typical of Central Anatolia. Winters are cold and snowy, summers are hot and dry, and spring brings showers. Although agricultural production in the district is limited, wheat, barley, chickpeas, sunflowers, and melons are grown, and livestock farming continues in some neighborhoods. Eymir Lake, Elmadağ, and the Oran forest area are the main areas that make up the district's natural environment.

With a settlement history dating back to ancient times, Çankaya underwent a rapid urbanization process after the proclamation of the Republic and gained district status in 1936. Today, the district consists of 124 neighborhoods, with the majority of the population living in the central neighborhoods. The district is a center for education, trade, services, and cultural activities. Universities, research institutions, museums, cultural centers, theaters, and art galleries enrich the district's social and cultural structure. In addition, Anıtkabir, Atatürk Forest Farm, various parks, museums, and festivals make Çankaya one of Ankara's prominent centers of life, culture, and tourism.

Çubuk

Çubuk is located 39 km from the city center of Ankara, with an area of 1,248 km² and an altitude of 1,100 m in the northern part of the province. The district has a population of 100,750, of which 48.5% are male (48,881 people) and 51.5% are female (51,869 people). Its settlement history dates back to the Hittites and extends through the Phrygian, Galatian, Persian, Roman, Byzantine, and Seljuk periods. The region witnessed intensive settlement by the Oghuz tribes following its conquest by the Seljuk commander Çubuk Bey. The district gained historical significance with the Battle of Ankara in 1402 and stands out in terms of water resources with the Çubuk River flowing north-south and the dams built on it. Karagöl,

a crater lake, and the Çubuk II Dam attract attention with their drinking water supply and recreational functions.

The economy of Çubuk is mainly based on agriculture and animal husbandry. Wheat, barley, chickpeas, lentils, dry beans, sugar beets, potatoes, and onions are the main crops grown in the district's plains, while vegetables such as melons, tomatoes, and peppers, and fruits such as cherries, apples, pears, and quinces are also widely grown. The district has also gained brand value through pickling, with annual production reaching 10,000 tons, and its products have begun to be marketed abroad through the "International Pickle and Culture Festival." Cherry production and marketing are the main sources of income for many villages. The thermal springs and facilities in Melikşah contribute to health and sports tourism, while the planned Organized Industrial and Organized Livestock Areas offer new opportunities for the district's economic development by bringing agriculture, livestock, and industrial activities into a more organized structure.

Elmadağ

Elmadağ is located 41 km from the city center of Ankara, with an area of 573 km² and an altitude of 1,135 m, in the east of the province. The district has a population of 45,133, of which 22,579 are male (50.0%) and 22,554 are female (50.0%). With a history dating back to the Phrygian, Lydian, Persian, Roman, and Byzantine civilizations, Elmadağ came under Seljuk rule after 1071 and witnessed the Crusades and Mongol invasions. Settlements within the district boundaries, such as Hasanoğlan, Lalahan, and Yeşildere, have supported social and economic vitality throughout history; records found in the town of Hasanoğlan show that this region was one of the important fiefdoms during the Ottoman period. Today, Elmadağ contributes to the city's recreational needs with its natural beauty, Kargalı Creek, and surrounding picnic areas.

The economy of Elmadağ is based on agriculture, animal husbandry, and small-scale industrial activities. Although a significant portion of the district's land is hilly and rocky, crops such as wheat, barley, chickpeas, lentils, and beans are grown in agricultural areas; tomatoes, eggplants, peppers, squash, and green leafy vegetables are also produced. Apples, pears, cherries, and walnuts are prominent in fruit growing, while grape cultivation has developed in recent years. Small family businesses are common in animal husbandry, with cattle breeding and small livestock farming playing an important role. Poultry and beekeeping activities also provide diversity. The meat processing facilities established around Hasanoğlan in the district contribute to local employment and meet the demand for meat products throughout Ankara. In addition, hand-woven carpet and rug production are among the cultural values that keep traditional handicrafts alive today.

Etimesgut

Etimesgut is one of the rapidly developing metropolitan districts located in the west of Ankara. Throughout history, the district's lands have been settled by the Hittite, Phrygian, Roman, Byzantine, Seljuk, and Ottoman civilizations. During the Republican era, it was reshaped with the settlement of Turkish immigrants from Western Thrace as part of the "model village" project. It gained district status with Law No. 3644 dated May 20, 1990. Today, Etimesgut, with its 38 neighborhoods and a population of 629,112, is one of the most populous districts of Ankara. Men make up 49.2% (309,721 people) of the district's population, while women make up 50.8% (319,391 people). This balanced population structure is decisive in planning Etimesgut's urbanization and service needs.

The district stands out for its cultural, educational, sporting, and tourism opportunities. Etimesgut Airport is a strategic facility jointly used by the Turkish Aeronautical Association and the Air Force, hosting defense industry and aviation fairs. Recreational areas such as Göksu Park and Susuz Reservoir contribute to the district's social life. In addition, the cultural centers and art workshops of the Etimesgut Municipality provide a platform for the preservation of traditional and contemporary arts. Playing an

important role in the industrialization and modernization process, Etimesgut has become one of Ankara's dynamic districts today with its strong demographic structure as well as its economic and cultural activities.

Evren

Evren is located 178 km from the city center of Ankara, with a population of 3,536, an area of 218 km², and an altitude of 900 meters in the southeast of the province. 50.5% of the district's population is male (1,785 people) and 49.5% is female (1,751 people). A small settlement, Evren stands out with its geography shaped by the Hirfanlı Dam and the Kızılırmak River. The district center was relocated in 1957 due to the construction of the dam and gained district status in 1990. Today, the district, which makes its living from agriculture, animal husbandry, and fishing, also has tourism potential with its natural areas on the lake shore.

Evren's economy is largely based on grain farming, small-scale livestock farming, and fishing. A significant portion of the district's soil is sandy-loamy, making grain production widespread. Hirfanlı Dam Lake contributes to the local economy through electricity generation, irrigation, and fishing activities. The lake, where species such as carp, catfish, and mullet are caught, is also a valuable area for recreation and tourism. The picnic areas along the Kızılırmak River and the lake view offer attractive opportunities for visitors to the district. Although the low population, migration trend, and limited industrial presence constrain the district's development, agriculture, fishing, and rural tourism are decisive factors in Evren's socio-economic structure.

Gölbaşı

Gölbaşı is located 20 km from the city center of Ankara, with a population of 165,201, an area of 1,810 km², and an altitude of 974 m, situated in the south of the city. The district's population consists of 50.6% men (83,537 people) and 49.4% women (81,664 people). The natural areas around Lake Mogan and Lake Eymir define the district's identity, while Tulumtaş Cave and the archaeological sites around it enhance Gölbaşı's geological and cultural diversity. There are 47 neighborhoods and 7 villages in the district; lakes, wetlands, and recreational corridors are intertwined with urban settlements.

Gölbaşı's economy relies heavily on services and tourism; the recreational areas, coastal developments, and picnic areas along the Mogan Park–Mogan Lake axis support the flow of visitors from within and outside the district. The mounds and ruins identified throughout the district (Early Bronze Age, Hittite, Roman–Byzantine periods) point to cultural heritage potential, while the lake and wetland ecosystems necessitate a balance between conservation and use in planning due to environmental sensitivity. In this context, Gölbaşı is one of Ankara's strategic districts in terms of nature-based recreation, cultural tourism, and the harmonious development of residential and industrial areas.

Güdül

Güdül is located 90 km from the city center of Ankara, with a population of 8,521, an area of 419 km², and an altitude of 720 m, situated in the northwest of the city. The district's population consists of 50.9% men (4,337 people) and 49.1% women (4,184 people). Güdül joined the Cittaslow (Slow City) network in 2020, becoming the first district in Central Anatolia and Ankara to receive this title. The district's historical fabric is protected by areas declared urban sites in 1996 and 58 registered buildings; the Güdül City Museum (supported by the Ankara Development Agency) showcases the region's socio-economic and cultural heritage. The Kirmir River Valley and the Yeşilöz–Adalar–Kızık highlands attract visitors for nature walks and recreation, while The Salihler Rock Inscriptions (1st–2nd century AD petroglyphs; a site since 2012) and the Roman bath in Çağa (thermal, possible connection to Mnizos) highlight the district's archaeological/cultural values.

The economy of Güdül is based on horticulture, agriculture, and animal husbandry; angora goat breeding and milk production are key. Tomatoes and carrots dominate vegetable farming, cherries dominate fruit farming, and table grape cultivation has grown in recent years. Small-scale mining based on raw materials such as pumice, kaolin, and perlite exists in the district. Ongoing projects for the Çaga geothermal source (hotel/timeshare, health and physical therapy units), along with the Kirmir delta's bird diversity and rural landscape, support culture-nature-thermal tourism in line with Cittaslow principles. Events such as the Cherry Festival and Harvest Festival play a complementary role in promoting local products and ensuring continuous visitor traffic.

Haymana

Haymana is located 73 km from the city center of Ankara, with an area of 2,367 km² and an altitude of 1,259 m, in the south of the city. The district has a population of 27,241, of which 52.6% are male (14,323 people) and 47.4% are female (12,918 people). The topography is predominantly plateau-like; a gently undulating plateau landscape is dominant, broken by the elevations around Karacadağ (1,724 m), Mangaldağ (1,436 m), and Çaldağı (1,351 m). Continental climate conditions (cold winters, hot/dry summers) and steppe vegetation are prominent; forest areas are limited. A dual carriageway connection to Ankara via Gölbaşı, access to the Polatlı High Speed Train station (≈38 km), and axes connecting to Konya enhance the district's accessibility.

The economic structure is based on agriculture and animal husbandry; dry field crops (wheat, barley, chickpeas, etc.) and small and large livestock breeding are widespread. Geothermal resources (Haymana Hot Springs) are a key attraction for health tourism and accommodation investments; hot spring-themed events and service businesses organized in the district contribute to local employment. Archaeological and cultural assets (Gavurkale rock reliefs, Külhöyük surroundings), rural landscapes, and plateau routes (plateau walks, nature tours) are prominent areas that support the potential for cultural/nature tourism.

Kahramankazan

Kahramankazan is located 45 km from the center of Ankara, with a population of 62,060, an area of 611 km², and an altitude of 780 m, situated in the northwest of the city. The district population consists of 51.3% men (31,830 people) and 48.7% women (30,230 people). Located on the Akıncı Plain, the district has a continental climate; its agricultural lands consist mainly of flat and fertile areas.

The district's economy is diversified around agriculture, animal husbandry, and industry. Wheat, barley, chickpeas, sugar beets, and especially "plain melons" are prominent products; modern irrigation and greenhouse cultivation aim to increase yields. Dairy cattle farming, large and small livestock breeding, poultry farming, and beekeeping are widespread. With production facilities concentrated in Saray and its surroundings, the district is an important part of the Ankara metropolitan industrial network. Its transportation advantage (proximity to the Ankara-Istanbul axis and highway connections) provides a logistical advantage. In terms of recreation and culture, the Asarkaya rock mass in Karalar, the Bitik Höyüğü, and the area around the Kurtboğazı Dam stand out; the Melon Festival held in the summer supports local agriculture and tourism potential.

Kalecik

Kalecik is a district located 71 km from the city center of Ankara; it has a population of 12,801, an area of 1,318 km², and an altitude of 725 m. 52.8% of the population is male (6,763 people) and 47.2% is female (6,038 people). It is located in the northeast of Ankara, bordered by Sulakyurt to the east, Çubuk–Akyurt to the west, Çankırı/Şabanözü to the north, and Kırıkkale–Elmadağ to the south. The Kızılırmak Valley runs through the district, providing a natural corridor with a fertile plain for settlement.

The economy is heavily based on agriculture; in addition to wheat, barley, sugar beet, and fruit growing, viticulture is strong. The district's unique Kalecik Karası grape increases the potential for branding in winemaking. Underground resources such as bentonite and marble are present; animal husbandry is secondary. Kalecik Castle, Develioğlu Bridge, Hasbey–Saray–Tabakhane mosques, and the Kazancıbaba and Alişoğlu tombs are the district's main cultural assets. The vineyards stretching along the Kızılırmak River attract visitors for rural tourism, nature walks, and local gastronomic experiences; traditional tanning, coppersmithing, and weaving support the cultural identity.

Keçiören

Keçiören is one of the central districts of the capital, located 3 km from the city center of Ankara, with a population of 932,128, an area of 759 km², and an altitude of 850 m. 48.8% of the district's population is male (454,879 people) and 51.2% is female (477,249 people). The settlement structure spreads over densely populated residential areas, narrow steep valleys, and plateau surfaces. Geographically, it is located northeast of Pursaklar and Çubuk, west-northwest of Kahramankazan, southwest of Yenimahalle, and south-southeast of Altındağ.

The district's economy is mainly based on services and trade; small-scale manufacturing and artisan businesses also contribute to employment. Keçiören, which has strong connections to the city as a whole via main arteries and public transportation lines, stands out with its large parks and recreation areas, lively neighborhood markets, and social facilities. The Meteorology Museum within the historic Meteorology complex and VEKAM (Vehbi Koç and Ankara Research Center), which serves as a research and archive facility, strengthen the district's cultural infrastructure. Keçiören, which has rapidly urbanized from its past dominated by viticulture and horticulture to the present day, is now one of Ankara's most populous settlements.

Kızılcahamam

Kızılcahamam is located 83 km from the city center of Ankara, with a population of 28,823, an area of 1,785 km², and an altitude of 975 m in the northwest of the city. The population consists of 51.4% men (14,805) and 48.6% women (14,018). Due to its location in the transition zone between Central Anatolia and the Western Black Sea, its reservoirs and dense forest cover, it has a continental climate with some characteristics of the Western Black Sea; the average annual temperature is approximately 11 °C, with a maximum of 34 °C in summer and a minimum of -20 °C in winter; the average relative humidity is 66%. Soğuksu National Park is the district's "natural lung" and stands out for its rich flora and fauna.

The district's economy relies heavily on thermal and nature tourism and local agriculture and livestock farming. The sodium bicarbonate, chloride, and fluoride-rich thermal waters are preferred for supportive treatment of musculoskeletal and stress-related disorders through cures administered under medical supervision. For nature tourism, Soğuksu National Park, the Işık Dağı–Karagöl route, and the Yemişen, Hıdırlar, Salın, Eldelek, Başköy, and Yıldırım plateaus; the Eyrekkaya, Kurtboğazı, Bayındır, and Akyar dams, along with the ponds in the region, offer strong potential for hiking, camping, photo safaris, and bird watching. (Approximately 200 bird species are observed in the region, including the red kite and black vulture). Thanks to its proximity to Ankara and road connections, Kızılcahamam has a high appeal throughout the year for health tourism, weekend getaways, and outdoor activities.

Mamak

Mamak is located 3.5 km from the city center of Ankara; with a population of 686,777, an area of 308 km², and an altitude of 899 m, it is located at the eastern entrance of the city. 49.3% of the population is male (338,897 people) and 50.7% is female (347,880 people). The district is surrounded by Altındağ to the north, Elmadağ to the east, and Çankaya to the south and west. The highest points, Körpınar Hill (1,503 m) and Hüseyin Gazi Mountain, define the district's topography. The climate is continental;

winters are cold and rainy, summers are hot and dry. The Hatip River flows through the district; Bayındır Dam (Blue Lake) stands out in terms of recreation and water resources.

The economic structure is mainly based on trade, services, and small-scale manufacturing; in recent years, urban transformation, housing, and infrastructure investments have rapidly renewed the district's fabric. Mamak offers a corridor of life that brings Ankara's summer tradition to the city with over 180 parks and green areas. The Hüseyin Gazi Tomb and hill, the Cyprus village canyon–carved tombs, the Ortaköy archaeological site, the Kayaş Old Mosque, and Mavi Göl are the main attractions. The Conservatory building and the 75th Year Republic Amphitheater in the district provide high-quality venues for cultural and artistic activities, while the proximity to the Elmadağ Ski Center facilitates access to winter sports.

Nallıhan

Nallıhan is located 160 km from the city center of Ankara, with a population of 26,488, an area of 1,967 km², and an altitude of 625 m in the west of the province. The district population consists of 49.8% men (13,195 people) and 50.2% women (13,293 people). It is bordered by Beypazarı to the east, Göynük to the northwest, Mudurnu–Seben to the north, Sarıcakaya to the west, and Eskişehir and Mihallıçcık districts to the south. The Sakarya River basin is dominant in the rugged terrain surrounded by the Andız, Sarıçalı, Karageriş, and Sündiken mountain ranges; the Nallıhan and Aladağ streams are the main rivers. In terms of land use, forest areas account for 48%, agricultural areas for 25%, meadows and pastures for 22%, and scrubland for 5%. The district stands out for its strong natural assets, such as the Hoşebe juniper forests, Nallıhan Bird Paradise, Uyuzsuyu and Soğukkuyu waterfalls, and the Bozyaka, Çamalan, and Eymir reservoirs.

The district's economy is mainly based on agriculture, livestock, trade, and public employment; mining and energy activities around Çayırhan and Sarıyar contribute to employment. Vegetable and fruit growing in irrigated areas and grain production along the riverbanks are widespread. Handicrafts such as needle lace, carpet and rug weaving, bindallı embroidery, and filigree work are an important part of the district's cultural identity. Nallıhan Bird Paradise and the protected areas around it create a strong attraction for bird watching, photography, and nature walks, while the geological formations around Asarlık Tepeleri and Ilıca support geotourism potential. Religious/cultural tourism is vibrant in Emrem Sultan village with the shrines of Tapduk Emre, Bacım Sultan, and others; the annual commemorative events held there increase the district's recognition.

Polatlı

Polatlı is located 78 km from the city center of Ankara, with a population of 130,515, an area of 3,100 km², and an altitude of 850 meters, situated to the west of the city. The district's population consists of 49.7% men (64,875 people) and 50.3% women (65,640 people). Settlement development gained momentum in 1892 with the passage of the railway through the district; the Yassıhöyük–Gordion archaeological site and the Alagöz Headquarters (Sakarya Battlefield Headquarters) are the main values that highlight the district's historical and cultural identity.

Polatlı's economy is mainly based on agriculture, agriculture-based trade, and industry. Wheat, barley, sugar beet, melon, and onion production stand out in the agricultural land exceeding 2.17 million decares; cattle, sheep, and poultry farming are widespread. The Polatlı Commodity Exchange, one of Turkey's most active grain exchanges, positions the district as one of the centers of regional grain trade. The logistics network, strengthened by the railway, the Ankara–Sivrihisar axis, and the high-speed train station, is supported by industrial establishments such as Şişecam (Trakya Polatlı), Ortadoğu Rulman, Ankara Dişli Dövme, and flour, feed, marble, and metal processing facilities. Polatlı OIZ is becoming operational; investments in Başkent OIZ and other OSBs ( ) around Malıköy, along with the planned free zone in Temelli, have the potential to increase the district's production and employment capacity.

Pursaklar

Pursaklar is located 14 km from the city center of Ankara, with a population of 165,665, an area of 157 km², and an altitude of 1,700 meters. It is located in the north of the city, on the Ankara–Çubuk line. The district's population consists of 49.6% men (82,173 people) and 50.4% women (83,492 people).

Located between the center of Ankara and Esenboğa Airport, Pursaklar has a residential settlement structure with high accessibility thanks to its proximity to the protocol road and the ring road. In the district, which consists of 21 neighborhoods, the foundations of the urban fabric were laid with the planned relocation from Eski Köy after the 1966 landslide; today, services, trade, small-scale production activities, and public employment are prominent. With a slightly hilly topography and arid terrain, the district shows linear development along the edge of the Çubuk Plain. The settlement, referred to as "Busaklar/Pursaklar" in 16th-century Ottoman cadastral records, has development potential for new housing, logistics, and urban functions due to its strategic road connections and proximity to the metropolis.

Şereflikoçhisar

Şereflikoçhisar is located 148 km from the city center of Ankara, with a population of 33,316, an area of 1,520 km², and an altitude of 975 meters, situated in the southeast of the province. 50.0% of the population is male (16,642 people) and 50.0% is female (16,674 people). Located within the Konya Closed Basin and Tuz Gölü Special Environmental Protection Area, the district stands out for its topography surrounded by the Karasenir and Paşa mountain ranges, its wetlands shaped by the Hirfanlı Dam Lake in the north and Tuz Gölü, Turkey's second largest lake, in the southwest. The region, whose settlement history dates back to the 2nd millennium BC, is believed to have carried the name Koçhisar, meaning "city with two castles," from the Seljuk-Ottoman periods; the remains of Parlasan (ancient Parnassos) and the traces of castles in the surrounding area demonstrate historical continuity.

The district's economy is primarily based on agriculture and livestock farming; wheat and barley are the main crops, along with chickpeas, lentils, cumin, sunflowers, sugar beets, dry onions, and fodder crops. The Peçenek Dam and the Seymenli and Karabük reservoirs provide limited irrigation opportunities; the Hirfanlı Dam Lake is important for fishing and recreation. Salt production is a strategic activity at the Kayacık and Kaldırım salt pans on the shore of Tuz Lake. The small industrial site and food, construction, and repair-focused businesses contribute to local employment. The flamingos and sunsets of Salt Lake, the fish restaurants on the Hirfanlı coast, Kurşunlu Mosque, Şereflikoçhisar City Museum, Peçenek Boğazı picnic area, Peçenek Dam, and Karasenir Mountain, which is suitable for nature walks, are the district's prominent tourism values.

Sincan

Sincan is located 27 km from the city center of Ankara, with a population of 590,309, an area of 874 km², and an altitude of 855 meters, situated in the west of the city. The district's population consists of 51.4% men (303,337 people) and 48.6% women (286,972 people). While traces of settlement in the region date back to the Seljuk period, Sincan's modern development gained momentum with the passage of the Istanbul–Baghdad railway in 1892. It was planned as a "model village" in 1936, and in 1939, 100 families of immigrants from Romania were settled there. It became a subdistrict center and municipality in 1956, gained district status on November 30, 1983, and was included in the boundaries of the metropolitan municipality in 1988.

Its location on the Ankara–Istanbul railway and the Ankara–Beypazarı–Ayaş highway makes Sincan a strong transportation and logistics hub. The climate is continental, becoming harsher towards the north. The wetlands around Ankara, Ova Creek, and Susuz Lake, along with the flat, fertile fields of Akıncı Plain, promote agricultural production in the district, especially vegetable farming. Meşe Peak (1,248 m)

and Belören Mountain (1,150 m) stand out in the topography. The district, which grew with the addition of Yenikent and the neighborhoods of the former Temelli town to Sincan under Law No. 5747 ( ), makes its urban identity visible with the Tulip Festival held every June; the Melon Festival in Yenikent supports the local agricultural brand. The economy diversifies beyond agriculture into services and trade, while planned growth and accessibility enhance the district's investment appeal.

Yenimahalle

Yenimahalle is located 5 km from the center of Ankara; with a population of 714,866, an area of 436 km², and an altitude of 830 m, it is situated on the west-northwest axis of the city. The population consists of 48.2% men (344,245) and 51.8% women (370,621). The district developed with planned residential areas in the mid-20th century and gained district status in 1957. Geographically, it is surrounded by Kahramankazan to the north, Keçiören and Altındağ to the east, Etimesgut and Çankaya to the south, and Sincan to the west. The Çubuk, Hatip, and İncesu streams converge at Akköprü to form the Ankara River; recreational areas and historic bridges stand out along this route. The forest farm area within the district boundaries forms the backbone of the urban open-green system.

Yenimahalle's economy is dominated by services, industry, and logistics. The İvedik OIZ (Organized Industrial Zone) and OSTİM, along with the GİMAT wholesale trade area, make the district one of the main hubs of Ankara's industry. The presence of numerous centers and campuses, primarily public institutions, supports skilled employment and ancillary services. Halk Ekmek, Türk Traktör, the banknote printing house, and various food/manufacturing facilities strengthen the production base, while shopping centers such as ANKAmall, ACity, Armada, Atlantis, Batıpark, GİMART, Meydan Batıkent, and Podium fuel the retail economy. With its proximity to transportation arteries, planned residential areas (such as Batıkent), and transformation zones, Yenimahalle has a mature urban infrastructure offering high capacity for residential, commercial, and industrial investments.

Assessing the differences between districts solely on the basis of demographic and sectoral data is limited. Therefore, in order to comprehensively compare the levels of development of Ankara's 25 districts, the Socio-Economic Development Index (SEGE) studies developed by the Ministry of Industry and Technology were used as a basis.

One of the most important tools used in analyzing and monitoring regional development differences in Turkey is the Socio-Economic Development Index (SEGE) studies developed by the Ministry of Industry and Technology. SEGE measures and compares the socio-economic performance of districts based on multidimensional indicators such as demographics, employment and social security, education, health, finance, competitiveness, innovation, and quality of life. Published at the provincial level in 2017 and at the district level most recently in 2022, SEGE reports serve as a strategic reference point for policymakers and investment planners.

The Socio-Economic Development Ranking of Provinces and Regions SEGE-2017 was prepared based on the evaluation and analysis of a total of 52 sub-variables consisting of demographics, employment, education, health, competitive and innovative capacity, finance, accessibility, and quality of life. The analysis results provide the socio-economic development index values, rankings, and development levels of provinces and Level-2 regions. Provinces are classified into 6 development levels.

Table 19: Socio-Economic Development Ranking — First-Tier Developed Provinces

Provinces	SEGE 2017 Ranking	SEGE 2017 Index Value
Istanbul	1	4,051
Ankara	2	2,718
Izmir	3	1,926

Kocaeli	4	1,787
Antalya	5	1,642
Bursa	6	1,336
Eskişehir	7	1,278
Muğla	8	1,175
Tekirdağ	9	1,014

Source: Ministry of Industry and Technology, 2019.

According to the SEGE-2017 results prepared by the Ministry of Industry and Technology, Ankara ranks second in Turkey and is considered among the first-tier developed provinces. When the sub-categories are examined, it is seen that Ankara is the country leader, particularly in education (1st place) and health (1st place) indicators. The diversity of universities in the capital, its higher education capacity, and specialized healthcare infrastructure enable Ankara to demonstrate superior performance in these areas.

Table 20: Ankara's Socio-Economic Development Ranking — SEGE 2017

	SEGE	Demography	Employment	Education	Health	Competitive and Innovative	Finance	Accessibility	Quality of Life
Ankara	2	10	4	1	1	2	2	3	2

Source: Ministry of Industry and Technology, 2019.

There is also a strong performance in terms of employment (4th place), financial indicators (2nd place), and competitive-innovative capacity (2nd place). This table shows that Ankara is not only the center of public administration but also one of Turkey's leading cities in terms of competitive strength and innovation ecosystem. Although the indicators for demographics (10th place) and accessibility (3rd place) are relatively lower, they still point to a performance well above the national average.

This strong picture at the provincial level varies across districts, with different patterns of development. The SEGE-2022 District Report, published by the Ministry of Industry and Technology, was prepared based on the evaluation and analysis of 56 variables covering demographics, employment and social security, education, health, finance, competitiveness, innovation, and quality of life.

Table 21: Socio-Economic Development Ranking — SEGE 2022 (Districts of Ankara)

District Name	Overall Ranking	Ranking Within the Province	Score	Tier
Çankaya	2	1	6,901	1
Yenimahalle	5	2	4,481	1
Altındağ	22	3	2,528	1
Etimesgut	47	4	1,957	1
Gölbaşı	57	5	1,790	1
Kahramankazan	75	6	1,538	2
Keçiören	89	7	1,365	2
Sincan	125	8	1,050	2
Mamak	165	9	0.779	2

Akyurt	174	10	0.705	2
Polatlı	206	11	0.581	2
Elmadağ	229	12	0.462	2
Pursaklar	231	13	0.447	2
Çubuk	261	14	0.298	3
Beypazarı	264	15	0.269	3
Sereflikochisar	298	16	0.115	3
Ayaş	330	17	0.032	3
Kizilcahamam	335	18	0.022	3
Nallıhan	378	19	-0.102	3
Kalecik	525	20	-0.359	4
Universe	616	21	-0.478	4
Güdül	630	22	-0.493	4
Çamlıdere	654	23	-0.526	5
Haymana	695	24	-0.578	5
Bala	725	25	-0.611	5

Source: Ministry of Industry and Technology, 2022.

Ankara's districts exhibit a highly heterogeneous distribution in terms of overall development level. In an assessment of 973 districts across Turkey, 5 districts in Ankara ranked in the first tier, 8 districts in the second tier, 6 districts in the third tier, 3 districts in the fourth tier, and 3 districts in the fifth tier. This table shows that while the capital forms a strong center of attraction, there are significant development differences in the surrounding and rural districts.

According to the SEGE-2022 results, Ankara districts differ in terms of development along the center-periphery-rural axis. Çankaya (2nd place), Yenimahalle (5th place), Altındağ, Etimesgut, and Gölbaşı are in the first tier, reinforcing the capital's position as an administrative, educational, health, and service center.

Kahramankazan, Keçiören, Sincan, Mamak, Akyurt, Polatlı, Elmadağ, and Pursaklar are in the second tier, standing out with their industrial/logistics activities and dense population structures. In contrast, Çubuk, Beypazarı, Şereflikoçhisar, Ayaş, Kızılcahamam, and Nallıhan are in the third tier, drawing attention with their rural character and limited economic diversity.

Kalecik, Evren, and Güdül are in the fourth tier, while Çamlıdere, Haymana, and Bala are in the fifth tier, presenting a relatively disadvantaged picture due to low population density and inadequate infrastructure. This distribution reveals that Ankara's central districts have strong competitive capacity, while rural districts require development-oriented, differentiated policies.

The gender-based population distribution of Ankara's districts as of 2024 shows how the capital's demographic structure differs between the center and the surrounding districts. The data reveals that Ankara's population is predominantly concentrated in the large central districts and that gender ratios are balanced across all districts.

Hata! Başvuru kaynağı bulunamadı. , Çankaya (947,000) and Keçiören (932,000) are Ankara's most p opulous districts. They are followed by Yenimahalle (715,000), Mamak (687,000), and Etimesgut (629,000). These districts are the centers of both economic and social life in the capital, and their high population density is an important indicator in terms of service infrastructure and investment potential.

Among the districts with medium-sized populations, Sincan, Altındağ, Pursaklar, Polatlı, and Gölbaşı stand out, while the population numbers in rural districts are quite low. Districts such as Evren (3,096), Kalecik (12,801), and Güdül (8,521) are particularly noteworthy as Ankara's smallest settlements in demographic terms.

Table 22: Population Distribution in Ankara Districts by Gender (2024)

No	District Name	Male	Female	Total
1	Çankaya	452,771	494,559	947,330
2	Keçiören	454,879	477,249	932,128
3	Yenimahalle	344,245	370,621	714,866
4	Mamak	338,897	347,880	686,777
5	Etimesgut	309,721	319,391	629,112
6	Sincan	303,337	286,972	590,309
7	Altındağ	207,719	207,174	414,893
8	Pursaklar	82,173	83,492	165,665
9	Gölbaşı	83,537	81,664	165,201
10	Polatlı	64,875	65,640	130,515
11	Çubuk	48,881	51,869	100,750
12	Kahramankazan	31,830	30,230	62,060
13	Beypazarı	24,065	24,380	48,445
14	Elmadağ	22,579	22,554	45,133
15	Akyurt	22,135	22,406	44,541
16	Sereflikochisar	16,642	16,674	33,316
17	Kizilcahamam	14,805	14,018	28,823
18	Haymana	14,323	12,918	27,241
19	Nallıhan	13,195	13,293	26,488
20	Bala	11,973	9,920	21,893
21	Ayaş	7,206	6,464	13,670
22	Kalecik	6,763	6,038	12,801
23	Camlidere	5,626	4,849	10,475
24	Güdül	4,337	4,184	8,521
25	Evren	1,548	1,548	3,096

Source: TÜİK, 2024.

When examining the gender distribution, it is seen that the male and female populations are close to each other in all districts, and therefore there is no gender imbalance. For example, in Keçiören, the male population is 454,879, while the female population is 477,249; similarly, in Çankaya, the male population is 452,771, and the female population is 494,559. This table shows that gender ratios remain balanced in Ankara's districts despite differences in migration and fertility. The concentration of the majority of Ankara's population in central districts increases demand for services and infrastructure in these areas, while the low population in rural districts deepens socio-economic development disparities.

Table 23: Distribution of Educational Attainment in Ankara Districts (2024)

No	District Name	Illiterate	Literate but did not complete school	Elementary	Primary Education	Middle School or Equivalent Vocational Middle School	High School or Equivalent Vocational School	College or University	Master's Degree (Including 5- or 6-Year Faculties)	Doctorate	Unknown
1	Çankaya	6,460	43,232	84,085	11,181	72,847	222,158	323,313	84,966	25,313	3,970
2	Yenimahalle	7,771	44,763	97,956	17,804	80,084	175,117	191,772	34,312	5,674	1,882
3	Etimesgut	5,499	42,019	81,118	17,584	74,199	149,057	175,998	32,001	4,937	1,317
4	Keçiören	12,647	64,150	156,565	40,005	134,883	238,590	173,596	20,645	2,442	2,739
5	Mamak	12,018	47,702	118,019	35,530	106,123	178,104	109,644	10,605	976	1,981
6	Gölbaşı	1,625	10,688	23,464	5,044	19,085	42,762	38,753	7,961	2,096	598
7	Altındağ	6,716	32,053	76,750	23,414	64,369	99,674	62,872	7,733	881	1,224
8	Sincan	7,936	43,759	105,107	35,807	104,361	152,892	82,521	5,950	505	1,011
9	Pursaklar	2,022	13,357	28,666	8,700	26,328	41,770	26,733	2,918	325	369
10	Polatlı	2,340	10,167	30,998	6,851	19,313	29,855	18,567	1,667	130	726
11	Stick	2,198	6,975	21,208	5,797	15,877	27,633	12,232	1,005	102	253
12	Kahramankazan	856	4,811	12,393	3,576	10,062	13,860	9,277	877	71	103
13	Beypazarı	745	3,557	13,448	2,515	6,581	10,794	6,951	562	39	85
14	Elmadağ	987	3,293	8,279	2,304	7,234	12,891	6,464	508	37	114
15	Akyurt	611	3,718	9,107	2,766	7,248	9,981	5,988	409	30	107
16	Sereflikochisar	1,220	2,948	7,855	1,541	4,936	7,197	3,710	381	16	757
17	Kizilcahamam	927	1,833	7,648	1,448	3,741	7,689	3,828	326	21	71
18	Nallıhan	490	2,009	7,825	1,787	3,827	5,824	3,042	250	12	58
19	Ayaş	122	726	3,991	561	2,247	3,411	1,773	158	16	21
20	Bala	916	1,500	6,339	1,501	3,820	4,665	1,791	143	18	96
21	Haymana	1,125	2,466	8,600	2,173	4,384	4,862	1,773	118	22	188
22	Kalecik	406	891	4,058	699	1,970	2,793	1,302	90	8	28
23	Güdül	236	468	3,171	403	1,132	1,803	873	71	7	40
24	Camlidere	636	680	3,097	603	1,498	2,420	1,021	61	9	24
25	Universe	146	360	878	175	426	575	260	13	4	49

Source: TÜİK, 2024.

The distribution of educational levels across Ankara's districts shows significant differences from the city center to the countryside. In central districts such as Çankaya, Yenimahalle, and Etimesgut, the number of higher education graduates exceeds hundreds of thousands. Çankaya alone has over 300,000 university graduates and more than 110,000 postgraduate graduates, making it one of Turkey's districts with the highest concentration of highly educated residents. This picture reveals a strong human capital base in the capital, supported by public institutions, universities, and R&D centers.

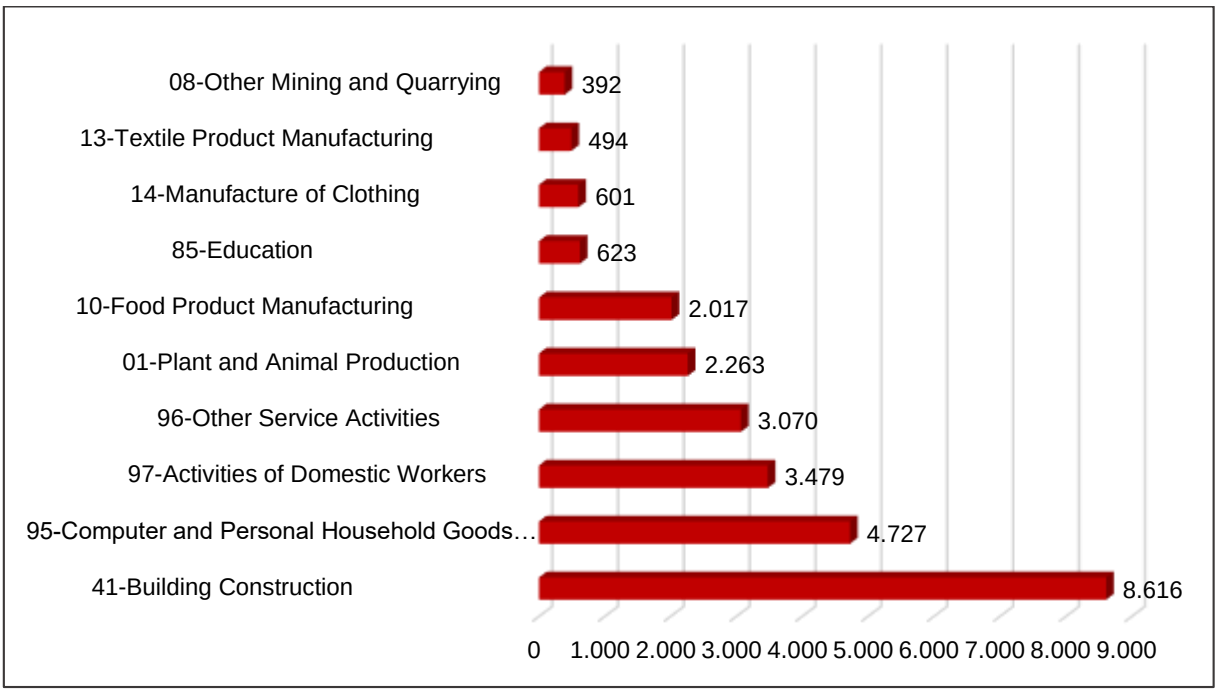
In districts with high populations such as Altındağ, Keçiören, Mamak, and Sincan, while the concentration of high school and elementary school graduates continues, the significant share of university graduates points to a heterogeneous structure in education. These districts stand out as areas where policies need to be developed for the transition from education to the workforce for the young population.

In rural districts (Çamlıdere, Evren, Güdül, Bala, Haymana), the number of higher education graduates is quite limited, while the illiteracy rate is relatively high. Educational indicators point to a fragile picture in these districts, highlighting the importance of social policy and accessible education investments.

These data show that Ankara's central districts are a strong magnet for knowledge economy-focused sectors with their highly educated workforce, while educational imbalances persist in the peripheral and rural districts. The findings reveal that Ankara's higher education capacity is a prominent advantage in its investment and promotion strategy, but also that differences between districts must be carefully evaluated.

These differences in education levels are directly related to the economic structure of the districts. Central districts with a high concentration of skilled labor also show greater diversity in employment-generating sectors. In contrast, agriculture and traditional sectors continue to dominate in rural districts. The sectoral distribution of insured employees and workplaces covered by social security in Ankara provides a critical indicator for understanding the province's economic dynamics and structural differences between districts.

Figure 11: Top 10 Sectors in Ankara with the Highest Number of Workplaces (4A)



Source: SGK, 2025.

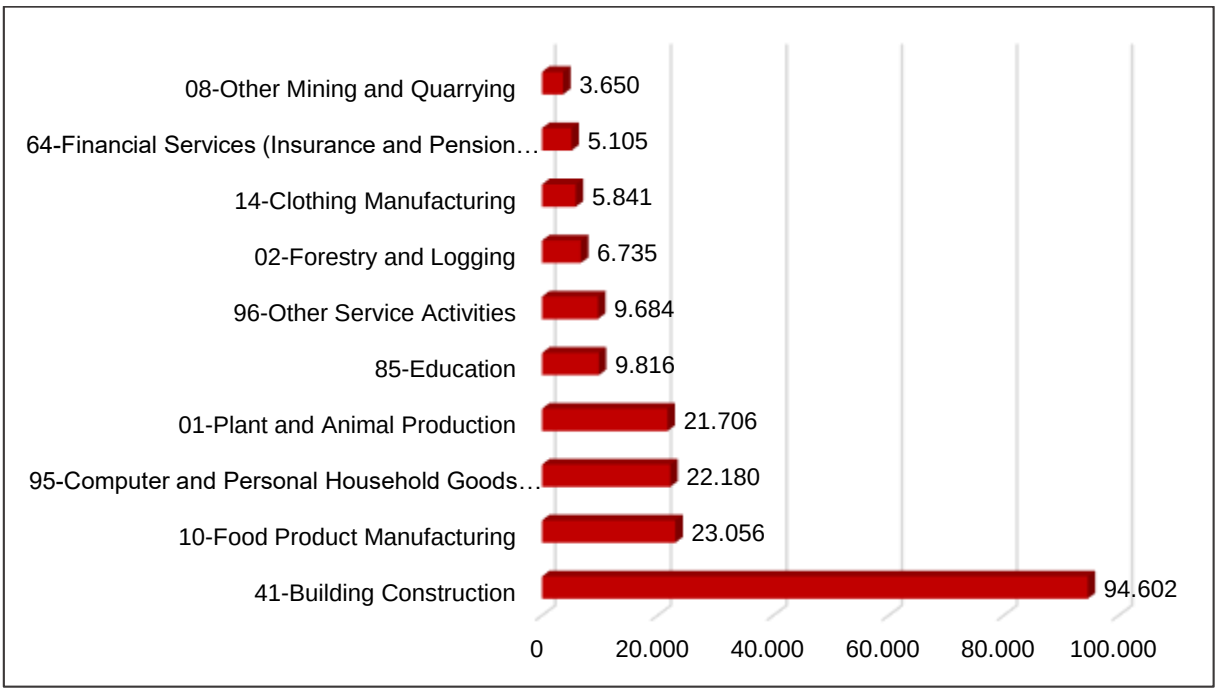
When examining the sectoral distribution of workplaces operating under 4A in Ankara, the building construction sector stands out with 8,616 workplaces. This is directly related to the city's rapid urbanization process, public and private sector construction investments, and high housing demand. The computer and personal household goods repair sector (4,727 workplaces), which ranks second, demonstrates the prevalence of small-scale and household-oriented service activities in Ankara. Domestic workers (3,479 workplaces) in third place and other service activities (3,070 workplaces) in fourth place reinforce the central role of the service sector in Ankara's economy.

Plant and animal production (2,263 workplaces) and food product manufacturing (2,017 workplaces) reveal that the agriculture and food sector remains important in rural districts. The education sector (623 workplaces), while more limited in terms of direct employment capacity, is a critical area in terms of social infrastructure. Although smaller in scale, the clothing manufacturing (601 workplaces), textile manufacturing (494 workplaces), and mining and quarrying (392 workplaces) sectors also stand out as areas that support Ankara's economic diversity.

In Ankara, workplaces covered by 4A (salaried, private sector employees (SSK)) are concentrated particularly in the construction and service sectors, while agriculture and manufacturing activities play a more limited but strategic role in certain sub-sectors.

When examining the sectoral distribution of the number of employees covered by 4A in Ankara, the building construction sector stands out as the highest employment area by far, with 94,602 people. This figure reveals that the sector is the most decisive area of the Ankara economy not only in terms of the number of workplaces (**Hata! Başvuru kaynağı bulunamadı.**), but also in terms of intensive labor d emand. The construction sector's dominance can be explained by the combined effects of urban transformation projects, infrastructure investments, and housing demand.

Figure 12: Top 10 Sectors in Ankara with the Highest Number of Employees (4A)



Source: SGK, 2025.

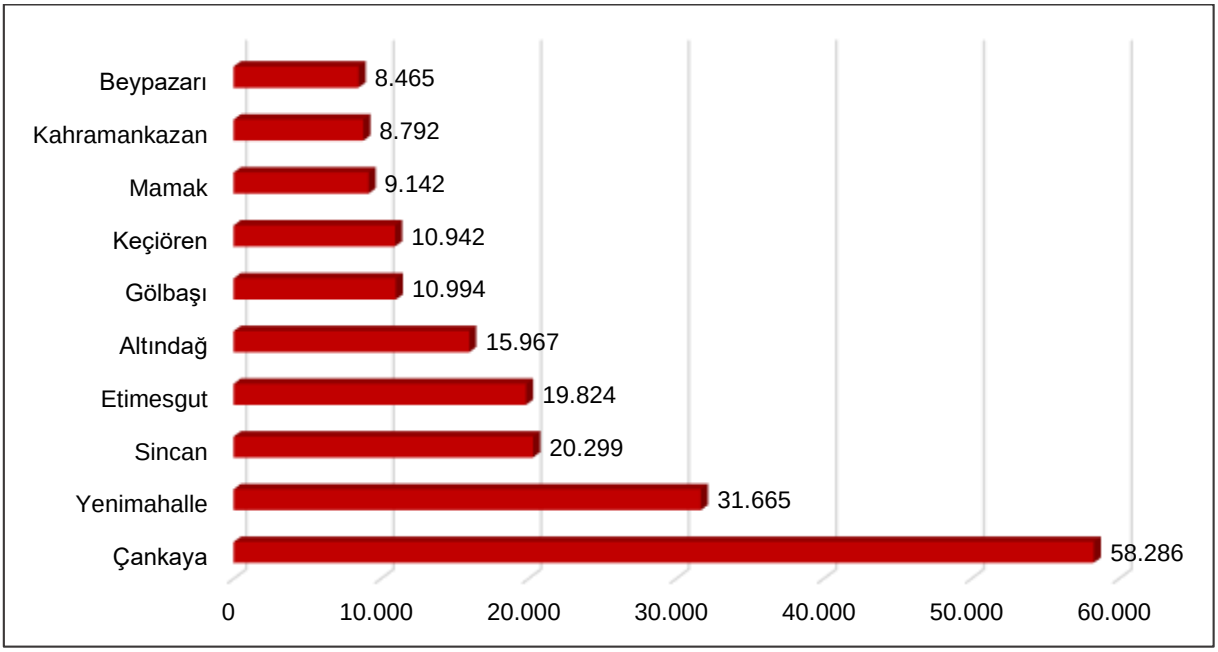
Food product manufacturing (23,056 employees) and repair of computers and personal household goods (22,180 employees), which rank second, show that Ankara has a strong employment capacity in both the agriculture-food chain and the service sector. What is noteworthy here is that although food manufacturing ranks in the middle in terms of the number of workplaces, it has risen to the top in terms of the number of employees. The findings show that the sector creates intensive employment through larger-scale businesses.

Plant and animal production (21,706 employees) reveals that agricultural activities are still a strong source of employment in rural Ankara, while education (9,816 employees) and other service activities (9,684 employees) stand out with their high number of employees despite their limited number of workplaces. This table reflects the intensive employment capacity of education and social services in the city.

Forestry and logging (6,735 employees), apparel manufacturing (5,841 employees), financial services (5,105 employees), and mining and quarrying (3,650 employees), which rank lower, have relatively low shares in terms of the number of employees . However, these sectors increase the diversity of employment and show that Ankara's economy is not dependent on just a few areas.

It is observed that a significant portion of employees covered by 4A (salaried, private sector employees (SSK)) in Ankara are concentrated in construction, agriculture-food, and some service sectors, while the number of employees in some sectors with a high number of workplaces remains limited.

Figure 13: Top 10 Provinces with the Highest Number of Employees (4A)



Source: SGK, 2025.

Hata! Başvuru kaynağı bulunamadı. , the districts in Ankara with the highest number of employees u nder the 4A category are concentrated in the city center and densely populated areas, as well as in areas where the industrial and service sectors are concentrated. Çankaya is the clear leader with 58,286 employees, and this concentration is explained by the centralization of public institutions, the service sector, education, and professional activities. It is followed by Yenimahalle (31,665) and Sincan (20,299), which stand out as centers with strong industrial, logistics, and commercial activities. Etimesgut and Altındağ are also among the important employment centers with 15,000–20,000 employees. The more medium-sized districts of Gölbaşı, Keçiören, Mamak, Kahramankazan, and Beypazarı are on the list with 8,000–11,000 employees, showing that employment in Ankara is not only concentrated in the central districts but also spread to the surrounding industrial and service-oriented districts. It is clear that central districts and industry/logistics-focused districts play a decisive role in the spatial distribution of 4A insured employees in Ankara.

Table 24: Ankara — Top 10 Sectors with the Highest Number of Employees (4A), First 5 Districts

Activity Code	Activity Groups (*) (According to NACE Rev.2 Classification)	1. District	2nd District	3. District	4. District	5. District
1	41-Building Construction	Çankaya	Yenimahalle	Etimesgut	Gölbaşı	Altındağ
2	10-Food Product Manufacturing	Yenimahalle	Çankaya	Akyurt	Etimesgut	Keçiören
3	95-Computer and Personal Household Goods. Repair.	Yenimahalle	Etimesgut	Çankaya	Altındağ	Akyurt
4	01-Plant and Animal Production	Sincan	Beypazarı	Çankaya	Yenimahalle	Polatlı
5	85-Education	Çankaya	Keçiören	Altındağ	Etimesgut	Pursaklar
6	96-Other Service Activities	Çankaya	Yenimahalle	Etimesgut	Gölbaşı	Keçiören
7	02-Forestry and Logging	Sincan	Çankaya	Kizilcahamam	Camlidere	Beypazarı
8	14-Clothing Manufacturing	Altındağ	Çankaya	Yenimahalle	Beypazarı	Sincan
9	64-Financial Services (Insurance and Labor)	Çankaya	Altındağ	Yenimahalle	Etimesgut	Keçiören
10	08-Other Mining and Quarrying	Beypazarı	Sincan	Mamak	Çankaya	Şereflikoçhisar

Source: SGK, 2025.

Data on the sectoral distribution of employees covered by 4A in Ankara clearly reveals the spatial diversity and sectoral specialization trends in the province's economic structure. An analysis of the top 10 sectors highlights both the service and construction-focused concentration in the central districts and the agricultural and natural resource-based employment structure in the surrounding districts.

Çankaya and Yenimahalle, ranking high in numerous sectors, prove to be centers of attraction in terms of labor force beyond being central districts of Ankara. Çankaya is a leader, particularly in sectors such as construction, education, and financial services, which have both high employment capacity and value-added creation potential. Yenimahalle, on the other hand, stands out in activities that combine industry and services, such as food product manufacturing and IT repair services, positioning itself as the intersection of production and trade.

Sincan and Etimesgut, which form Ankara's western corridor, are strongly prominent in production and manufacturing-based sectors. Sincan holds the top spot in agricultural-based activities such as plant and animal production and forestry, while also being a significant source of employment in sectors such as textiles and mining. Etimesgut has become one of the centers of industry-service integration by focusing on areas such as construction, IT repair, and food manufacturing.

Surrounding districts such as Beypazarı, Polatlı, Kızılcahamam, and Çamlıdere stand out with their specializations based on natural resources and agriculture. Beypazarı is focused on agricultural production and mining, Polatlı on plant and animal production, and Kızılcahamam and Çamlıdere on forestry and logging. This picture shows that Ankara's rural hinterland offers a significant employment reserve centered on agriculture, food, and natural resources.

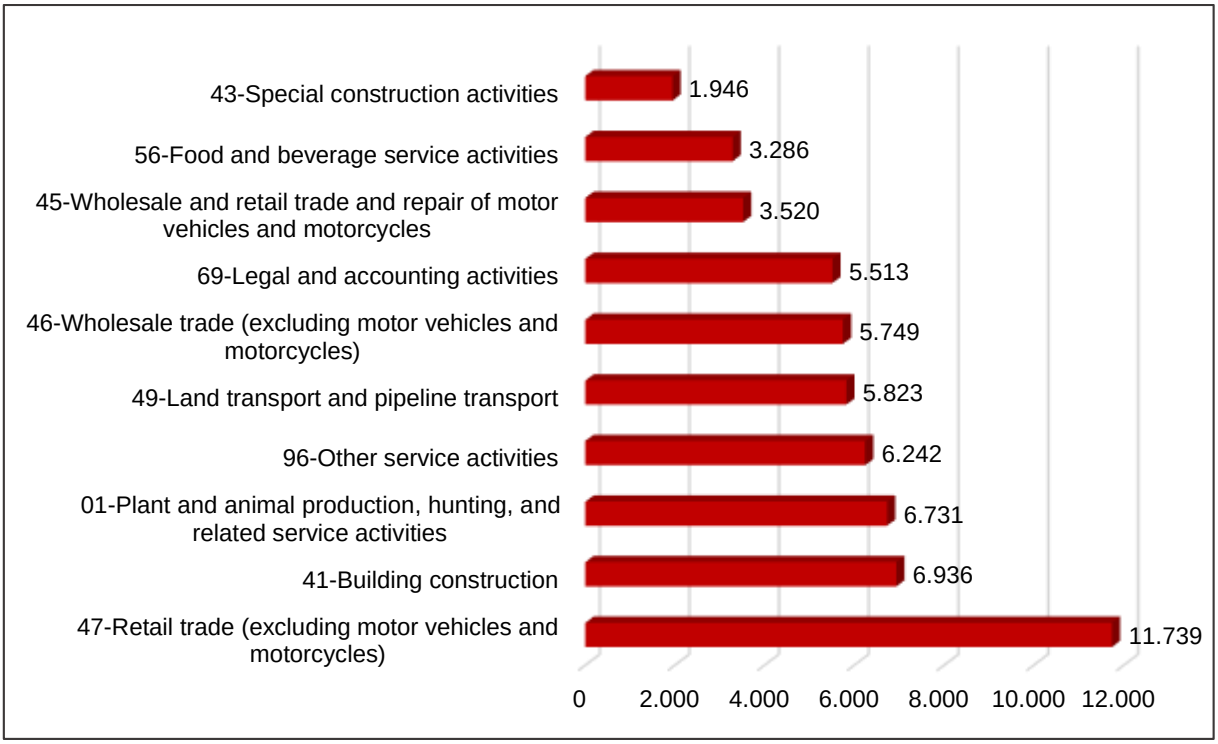
In contrast, densely populated districts such as Altındağ and Keçiören provide employment mainly in service and trade-oriented sectors. Altındağ's prominence in computer repair, education, and finance, and Keçiören's prominence in food manufacturing, education, and financial services reinforce these districts' place in the urban service economy.

Overall, three main trends stand out in Ankara's employment structure under the 4A framework:

- Service and construction sectors in central districts,
- Industrial and manufacturing concentration along the western axis,
- Agriculture, forestry, and mining activities in rural districts.

This distribution shows that a multi-centered structure has formed in Ankara's economic development. While high value-added services are concentrated in the central districts, industrial clusters are concentrated in the western axis, and natural resource-based production is gaining importance in the surrounding districts.

Figure 14: Top 10 Sectors in Ankara with the Highest Number of Employees (4B)



Source: SGK, 2025.

Hata! Başvuru kaynağı bulunamadı. shows that self-employed workers (4B insured persons) in A nkara are concentrated in the trade, construction, agriculture, and service sectors.

The highest employment under category 4A was in the retail trade sector (excluding motor vehicles and motorcycles), with 11,739 people. The data reveals the prevalence of small-scale retail businesses in Ankara, particularly grocery stores, markets, textile shops, and various retail stores. The retail sector has been the most popular choice for individual entrepreneurs due to its low entry barriers and broad customer base.

This is followed by building construction (6,936 people) and plant and animal production and hunting (6,731 people). This table shows that, on the one hand, construction activities brought about by urban growth and, on the other hand, agricultural and livestock activities in rural districts are two strong focal points in terms of 4B insurance coverage in Ankara. Small contractors, subcontractors, and independent craftsmen in the construction sector, and farmers running their own businesses in agriculture, form the main source of employment.

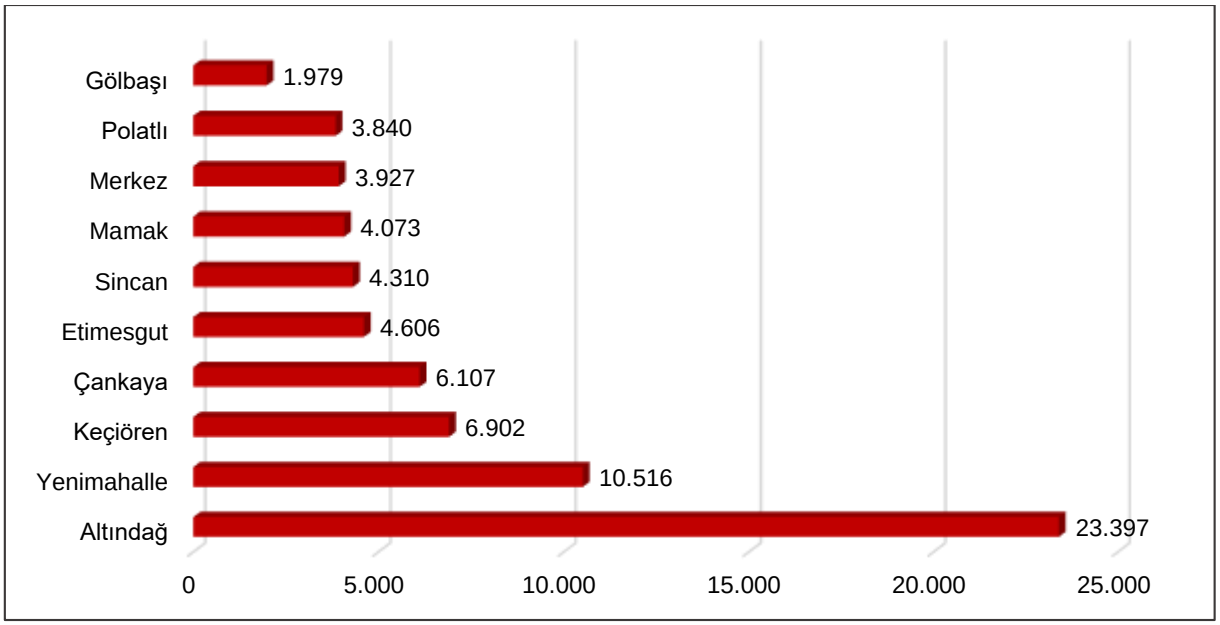
Other service activities (6,242 people) point to a heterogeneous structure in Ankara. Small-scale individual businesses in this category cover a wide range of activities, from hairdressing to repair services, reflecting the city's artisan-based economy.

Legal and accounting activities (5,513 people) also stand out in the service sector. The results are directly linked to Ankara's status as the capital; the dense presence of public institutions, private companies, and non-governmental organizations increases the demand for legal and financial consulting services, and therefore freelance lawyers and financial advisors occupy an important place in 4B employment.

The transportation and logistics sectors are also noteworthy. Road transport and pipeline transport (5,823 people) and the trade/repair of motor vehicles and motorcycles (3,520 people) reflect Ankara's strong road-focused transportation infrastructure. Ankara's role as a logistics hub in Central Anatolia creates a dense employment area for individual entrepreneurs in the fields of transportation and vehicle trade.

Although to a lesser extent, food and beverage services (3,286 people) and private construction activities (1,946 people) are also among the important sectors. These areas consist mostly of restaurants and cafes operated with small capital, subcontracted construction workers, and independent craftsmen, representing flexible and entrepreneurial-based employment in the urban economy.

Figure 15: Top 10 Provinces with the Highest Number of Employees (4B)



Source: SGK, 2025.

When examining the distribution of workers covered by 4B (self-employed, tradespeople, entrepreneurs (Bağ-Kur)) in Ankara by district, Altındağ district ranks first by a wide margin, accounting for a very large portion of the total with 23,397 workers. The findings show that Altındağ is Ankara's most concentrated center in terms of small-scale commercial enterprises, tradespeople, and retail activities. The district's traditional commercial fabric and large consumer base stand out as the main factors supporting individual entrepreneurial activities.

Yenimahalle (10,516 people) ranks second, and it is understood that the district hosts a high number of 4B insured persons thanks to its industrial sites, logistics areas, and organized trade zones. This structure highlights the importance of Yenimahalle not only in industrial production but also as a center for entrepreneurs working under the 4B scheme.

Keçiören (6,902 people), Çankaya (6,107 people), and Etimesgut (4,606 people) are ranked as districts creating medium-level employment. Keçiören, with its dense population, forms the center of service and small-scale trade-based entrepreneurship; Çankaya, due to its capital city identity and central functions, stands out in liberal professions such as law, accounting, and consulting. Etimesgut, with its growing population and industrial development, shows intensity in logistics, transportation, and small business entrepreneurship.

Sincan (4,310 people), Mamak (4,073 people), Merkez (3,927 people), and Polatlı (3,840 people) have lower levels of employment. Sincan stands out with its industrial production and agricultural activities; Mamak with its urban service economy; and Polatlı with its individual entrepreneurial activities related to agriculture and animal husbandry. These districts have potential in terms of 4B insurance coverage but have not reached the level of density seen in the central districts.

Gölbaşı (1,979 people), which ranks last, offers a limited employment structure when population and workplace capacity are taken into account. However, considering the district's increasing urban development and university-technopark investments, it is assessed that it has the potential to develop in terms of service and technology-oriented individual entrepreneurial activities in the coming period.

Altındağ is the center of micro-scale trade and the artisan economy; the modernization of this structure and its integration into the formal economy should be prioritized in investment strategies. Yenimahalle is strong in terms of industry and logistics-based entrepreneurship; clustering policies in these areas should be supported. Keçiören and Çankaya are districts with a high concentration of service and freelance activities and require education and financial support programs for the entrepreneurial ecosystem.

Etimesgut and Sincan are natural extensions of industrial and logistics development on the western axis; the capacity for scaling up entrepreneurship in these districts should be considered. Polatlı and its surroundings play a critical role in agriculture-based entrepreneurship and constitute a priority area for rural development support. Despite its low current capacity, Gölbaşı requires differentiated policies in the investment strategy due to its future growth potential focused on services and technology.

Table 25: Ankara — Top 10 Sectors with the Highest Number of Employees (4B), First 5 Districts

Activity Code	Activity Groups (*) (According to NACE Rev.2 Classification)	1. District	2nd District	3. District	4. District	5. District
1	47-Retail trade (excluding motor vehicles and motorcycles)	Altındağ	Keçiören	Yenimahalle	Sincan	Etimesgut
2	41-Building construction	Altındağ	Çankaya	Yenimahalle	Etimesgut	Mamak
3	01-Plant and animal production, hunting, and related service activities	Polatlı	Haymana	Bala	Şereflikoçhisar	Beypazarı
4	96-Other service activities	Yenimahalle	Altındağ	Çankaya	Keçiören	Mamak
5	49-Road transport and pipeline transport	Altındağ	Keçiören	Yenimahalle	Sincan	Mamak
6	46-Wholesale trade (excluding motor vehicles and motorcycles)	Altındağ	Yenimahalle	Central	Keçiören	Çankaya

7	69-Legal and accounting activities	Altındağ	Çankaya	Central	Keçiören	Yenimahalle
8	45-Wholesale and retail trade and repair of motor vehicles and motorcycles	Yenimahalle	Etimesgut	Altındağ	Keçiören	Polatlı
9	56-Food and beverage service activities	Altındağ	Keçiören	Yenimahalle	Çankaya	Etimesgut
10	43-Special construction activities	Yenimahalle	Altındağ	Keçiören	Sincan	Etimesgut

Source: SGK, 2025.

Data on the sectoral distribution of workers covered by 4B in Ankara clearly reflects the spatial diversity and entrepreneurial tendencies of the province's economic structure. An analysis of the top 10 sectors shows that services and trade are predominant in the central districts, industry and logistics in the western axis, and agricultural activities in the rural districts.

Altındağ holds a dominant position in 4B employment, ranking first in many sectors. Altındağ, which stands out in areas such as retail and wholesale trade, land transportation, building construction, law-accounting, and food-beverage services, reveals itself as one of the central districts of small-scale entrepreneurship and tradesmanship. The analysis shows that Altındağ plays a strong role in the urban service economy.

Yenimahalle stands out as the second center of attraction in terms of 4B employment. The district is particularly prominent in sectors such as other service activities, private construction works, and the trade and repair of motor vehicles. The presence of industrial sites, trade centers, and logistics areas makes Yenimahalle a hub for both production and trade-oriented entrepreneurship.

Keçiören has a strong concentration in retail trade, land transportation, and food and beverage services. The demand created by the dense population supports small-scale trade and service activities, making Keçiören an important focus of urban service entrepreneurship.

Çankaya stands out particularly in sectors such as law and accounting, food and beverage services, and building construction. Due to its capital city identity and central functions, it is one of the districts with the highest concentration of entrepreneurial activity in the liberal professions. With this structure, Çankaya holds a fundamental position in Ankara's professional services economy.

Etimesgut and Sincan, located on Ankara's western axis, are notable for logistics and transportation-focused sectors. These districts, which rank among the top in activities such as road transport and motor vehicle trade, form an axis where industry and logistics converge, strengthening the western corridor in terms of entrepreneurship.

Among the rural districts, Polatlı ranks first in plant and animal production, followed by Haymana, Bala, and Şereflikoçhisar. Findings show that agricultural activities in rural Ankara are the main driver of 4B employment. Rural entrepreneurship is developing around agriculture, animal husbandry, and food production, contributing to the province's economic diversity.

Three key trends stand out in Ankara's 4B employment:

- The concentration of trade, services, and freelance activities in central districts,
- The development of logistics and transportation activities in the western axis,
- The predominance of agriculture-based entrepreneurship in rural districts

This distribution reveals that a multi-centered model has emerged in Ankara's entrepreneurship and employment structure and highlights the need for differentiated investment policies at the district level.

Table 26: Number of Employees and Workplaces by District in Ankara (4C)

	Number of Employees	Number of Workplaces
Çankaya	171,098	16,882
Yenimahalle	96,696	6,076
Altındağ	52,896	4,239
Etimesgut	24,464	1,911
Keçiören	21,178	1,908
Sincan	14,403	1,189
Gölbaşı	13,044	1,008
Mamak	12,063	720
Polatlı	4,811	478
Çubuk	4,191	593
Pursaklar	3,899	505
Kazan	2,599	341
Akyurt	1,931	231
Elmadağ	1,877	400
Beypazarı	1,459	262
Sereflikochisar	1,356	254
Kizilcahamam	952	227
Ayaş	826	208
Nallıhan	794	226
Haymana	645	154
Kalecik	534	137
Bala	384	122
Güdül	213	88
Camlidere	200	76
Evren	59	35
TOTAL	**432,572**	**38,270**

Source: SGK, 2025.

There are a total of 432,572 public employees in Ankara under the 4C category. This number is directly related to the city's status as the capital and highlights the decisive role of public employment in the Ankara economy. The distribution of public employees also reflects the spatial layout of public institutions.

Çankaya is the center of public employment with 171,098 employees and 16,882 institutions/units. The presence of ministries, the Grand National Assembly of Turkey, high judicial bodies, and numerous universities here has made Çankaya the most intensive public employment area not only in Ankara but in Turkey.

Yenimahalle (96,696 employees, 6,076 institutions/units) and Altındağ (52,896 employees, 4,239 institutions/units) follow in second place, with these districts showing a concentration of regional organizations, affiliated institutions, and central service units of public institutions. Yenimahalle, in

particular, stands out with its campus-style public institutions and regional service buildings established on large public lands.

Etimesgut (24,464), Keçiören (21,178), Sincan (14,403), Gölbaşı (13,044), and Mamak (12,063) are the districts providing public employment at the second level. In Etimesgut and Sincan, public employment is mainly derived from military units and municipal services. Keçiören and Mamak are areas with strong public services due to their dense population structure. In Gölbaşı, university campuses and research centers play a decisive role in public employment.

Public employment is lower in the surrounding districts. In districts such as Polatlı (4,811), Çubuk (4,191), Pursaklar (3,899), and Beypazarı (1,459), public employment is shaped by district governor's offices, municipalities, health, and education units. Districts with the lowest number of public employees, such as Evren (59), Çamlıdere (200), and Güdül (213), only host basic public service units.

The spatial distribution of public employment in Ankara is shaped at three fundamental levels:

- Central government-focused concentration led by Çankaya
- Regional and local service-oriented public employment formed by Yenimahalle, Altındağ, and second-tier districts
- Basic service-based employment carried out by a limited number of public units in rural districts.

This structure concretely demonstrates Ankara's characteristic as a city of bureaucracy.

Ankara is seen to have a multi-centered but asymmetrical development pattern. Central districts such as Çankaya, Yenimahalle, Altındağ, Etimesgut, and Gölbaşı have become the capital's economic centers thanks to their highly educated workforce, diversified sector structure, and concentration of public employment. Sincan and Etimesgut, located in the western corridor, have developed strong industrial, logistics, and manufacturing clusters, while districts such as Akyurt and Kahramankazan are supporting areas for industry-focused growth due to their transportation advantages and clustering tendencies.

Districts such as Çubuk, Beypazarı, Polatlı, Kızılcahamam, and Nallıhan are oriented towards development through agriculture, natural resources, and tourism potential; while districts with low population density such as Çamlıdere, Haymana, Bala, and Evren remain at a disadvantage due to infrastructure constraints and limited economic diversity. Differences in education indicators, with higher education graduates concentrated in central districts while remaining at low levels in rural districts, is a situation that requires careful consideration in terms of investment and human capital.

In terms of public employment, Ankara has a unique structure that reflects its identity as the capital. The central concentration, led by Çankaya and supported by Yenimahalle and Altındağ, reinforces Ankara's characteristic as a city of bureaucracy. However, data within the scope of 4A and 4B proves that the capital has an employment structure that is not only based on the public sector but also shows diversity in the axes of industry, services, agriculture, and entrepreneurship.

The differentiation between Ankara's districts offers two key conclusions in terms of the province's investment strategies. The first is the need to continue policies aimed at increasing competitiveness through the knowledge economy, high value-added services, and industrial clusters in the central districts. Second, it is necessary to develop differentiated policies that will activate the potential of agriculture, natural resources, tourism, and entrepreneurship in rural and peripheral districts, prioritizing infrastructure and education investments. In this context, transforming Ankara's multi-centered structure into a strategic advantage stands out as one of the most critical elements that will shape the fundamental vision of the investment and promotion strategy.

2.4. Competitiveness

The Creative Economy Periodic Sector Report of the Capacity Development Project for the Appropriate Transformation of the Creative Economy in Turkey (INSPIRE), carried out under the Competitive Sectors Program by the General Directorate of Development Agencies of the Ministry of Industry and Technology, reveals important findings. The turnover of the creative economy (cultural heritage, art, media, new media, design, creative services, etc.) is concentrated in certain regions.

As of 2015, 73.9% of the creative economy turnover in Turkey was generated in Istanbul (TR10), while Ankara (TR51) ranked second with 9.7%. They are followed by TR42 (Kocaeli, Sakarya, Düzce, Bolu, Yalova) with 3.4%, Izmir (TR31) with 2.6%, and TR61 (Antalya, Isparta, Burdur) with 2.5%. The data shows that more than 90% of the total turnover in the creative economy is concentrated in large metropolitan areas, while potential centers in Anatolia have a relatively low share.

Looking at employment data in Turkey's creative industries, it is evident that the sector is largely concentrated in specific centers. As of 2015, the region providing the most employment in the creative sectors is Istanbul (TR10), accounting for 58.5% of the total with 167,000 employees. This is followed by Ankara (TR51, 12.3%) with 35,000 employees, Izmir (TR31, 4.6%) with 13,000 employees, and Antalya–Isparta–Burdur (TR61, 3.8%) and Bursa–Eskişehir–Bilecik (TR41, 2.9%) regions, respectively.

Although creative industries are spread across the country, metropolitan areas dominate in terms of employment. Similarly, creative economy turnover is also concentrated in certain regions. As of 2015, 73.9% of Turkey's creative economy turnover occurred in Istanbul (TR10), while Ankara (TR51) ranked second with 9.7%. They are followed by TR42 (Kocaeli, Sakarya, Düzce, Bolu, Yalova) with 3.4%, Izmir (TR31) with 2.6%, and TR61 (Antalya, Isparta, Burdur) with 2.5%. Ankara, which ranks second after Istanbul in creative industries, stands out not only in terms of employment and turnover, but also in terms of its research and development capacity and entrepreneurial ecosystem.

Ankara has leveraged the institutional capacity offered by its status as the capital, supported by a strong university and research infrastructure, to establish significant R&D depth in the defense industry, machinery and equipment manufacturing, and software-based production. When examining the sub-dimensions of the Global Talent Competitiveness Index (GTCI), although the city performs relatively poorly in facilitator indicators (income per capita, unemployment rate) and attractiveness parameters, it presents a strong outlook in terms of growth and sustainability with its higher education capacity, concentration of R&D centers, and increase in patent applications. According to StartupBlink data, Ankara, home to Turkey's second-largest entrepreneurial ecosystem, is also gaining momentum on a global scale. However, fluctuations in investment volume and transaction numbers became particularly apparent in 2025; the resulting situation highlighted the need to strengthen early-stage capital mechanisms, scale up innovative ventures, and increase the capacity to attract international capital.

Table 27: Ankara in the Global Talent Competitiveness Index (GTCI) (2023)

		San Francisco	Zurich	Bucharest	Istanbul	Ankara
KYRE	KYRE Score	76.2	70.7	43.3	30.2	28.9
	KYRE Ranking (175 Cities)	1	3	88	132	140
Facilitation	Per Capita Income	100.0	57.9	52.0	30.4	**26.1**
	Internet Speed	70.6	27.5	37.3	**5.9**	**7.8**
	Unemployment	77.3	82.1	85.2	36.2	35.8

Attractiveness	Forbes Global 2000 Companies' Presence	84.0	100.0	0	**15.6**	**0**
	Foreign Population	42.1	43.8	3.0	**4.3**	**10.0**
	WIR Projects	71.0	72.3	64.4	**28.7**	**19.5**
Growth	Major Universities	98.58	93.6	9.6	**24.9**	**24.0**
	Participation in Higher Education	40.6	60.8	44.2	51.2	**15.2**
	Jobs Created by WIR	83.4	76.3	98.0	56.8	49.7
Sustainability	Security	59.1	87.2	85.8	67.7	69.1
	Environmental Quality	97.6	93.6	76.6	78.9	84.3
	Time Spent in Traffic	75.0	61.5	23.1	**0**	53.8
	Happiness	79.1	93.3	56.4	43.9	51.1
Global Information Skills	Higher Education Graduates	90.0	60.4	61.5	**12.7**	**28.5**
	Patent Applications	90.8	68.1	0.8	35.6	**27.4**
	Airport Connectivity	41.9	73.0	19.8	**23.7**	**10.8**
	Software Development	100.0	58.3	16.4	**3.4**	**2.8**

Source: ASO, 2024.

When Ankara's global competitiveness performance is evaluated using different indices, its strengths and areas for improvement are clearly distinguished.

According to the results of the 2023 Global Talent Competitiveness Index (GTCI) published by TEPAV, Ankara ranks 140th among 175 cities and is positioned in the lower ranks of the global competitiveness league with a score of 28.9. Although the data does not fully reflect Ankara's current potential, the indicators that stand out in the sub-dimensions reveal the city's future advantages.

When Ankara's performance is compared to other cities, there is a significant gap between it and San Francisco (76.2 points) and Zurich (70.7 points). In contrast, when compared to Bucharest (43.3 points), Ankara is notably more advantageous, particularly in the categories of major universities, environmental quality, and patent applications. When compared to Istanbul, Ankara is at a similar level in terms of overall KYRE score; however, it performs better than Istanbul in terms of environmental quality, population with higher education, happiness, and internet speed indicators.

When evaluated based on sub-dimensions:

- Facilitation: Per capita income and unemployment rates are Ankara's weakest areas. This situation limits the city's capacity to attract and retain talent.
- Attractiveness: The foreign population ratio and direct foreign investment projects remain low. Internationalization and attracting foreign talent are critical policy areas for the coming period.
- Growth: University infrastructure, access to higher education, and R&D capacity are Ankara's strengths. The increase in patent applications also supports this picture.
- Sustainability: Environmental quality and safety indicators show that Ankara has an advantage in terms of quality of life. The relatively good traffic time indicator is also a positive sign for the sustainability of urban life.

- Global Knowledge Skills: The population with higher education degrees, patent applications, and software development indicators reveal Ankara's potential for integration into the knowledge economy.

Ankara's KYRE performance requires a focus on labor market and international attractiveness indicators as "improvement themes" and on higher education infrastructure, R&D capacity, patent dynamics, and sustainability as "deepening themes." These indicators reveal that Ankara has a strong infrastructure on its way to becoming a technology-based production center.

Ankara is home to Turkey's second-largest startup ecosystem. According to the StartupBlink 2025 Index, Ankara ranks 2nd nationally, 20th in Eastern Europe, and 244th globally; with this position, it has risen 16 places in the global ranking over the past year. Approximately 141 startups are active in the city, accounting for 11% of the Turkish total. The ecosystem's annual growth rate was measured at 30.9%, highlighting Ankara's dynamism. .

Ankara's prominent sectoral strength in the startup ecosystem is seen in the Hardware and IoT field. In this field, Ankara ranks 179th globally and has recorded a 37% annual momentum with 15 startups. While there are startups in areas such as software and data, fintech, energy-environment, and health technologies, according to current data, the hardware-IoT cluster is one of the few areas where Ankara performs above the global average.

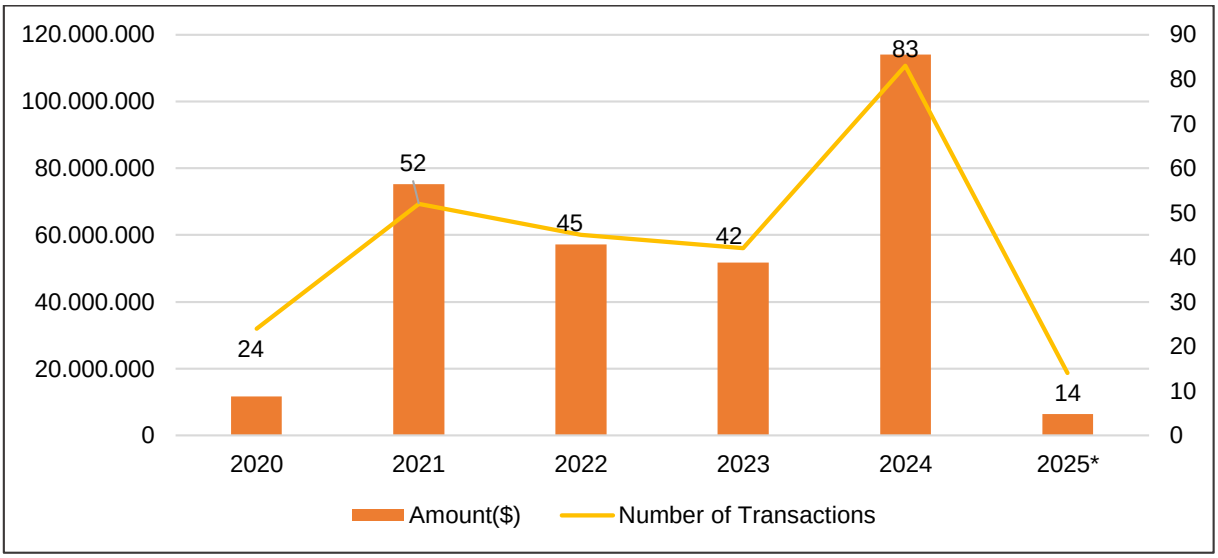
Table 28: Distribution of Investments in Istanbul, Ankara, and Izmir

		Istanbul	Ankara	Izmir
2021	**Amount**	$1.58B	$75.31M	$4.51M
	Transaction	272	52	17
2022	**Amount**	$1.65B	$57.2M	$12.38M
	Transaction	275	45	15
2023	**Amount**	$309.71M	$51.8M	$16.25M
	Transaction	263	42	18
2024	**Amount**	$1.32B	$113.97M	$7.71M
	Transaction	290	83	50
2025	**Amount**	$215.07M	$6.44M	$1.73M
	Transaction	66	14	6

*Reflects data for the first 6 months of 2025.
Source: StartupCentrum, 2025.

When examining investment data for the 2021–2025 period, Istanbul stands out as the province with by far the highest investment volume and has maintained its leadership in terms of the number of transactions. However, it is observed that investment amounts in Istanbul have fluctuated over the years, with a significant decline in the first half of 2025. Ankara, on the other hand, recorded a remarkable increase in both investment volume and number of transactions in 2024, demonstrating the dynamism of the ecosystem. However, this momentum could not be sustained in the first six months of 2025, with a sharp decline in both the number of transactions and the amount of investment. In Izmir, while the total investment volume remained relatively low, an increase in the number of transactions was observed between 2021 and 2023; however, this trend reversed in 2025, and a significant decline emerged in the city as well.

Figure 16: Investment Amounts and Numbers in Ankara by Year



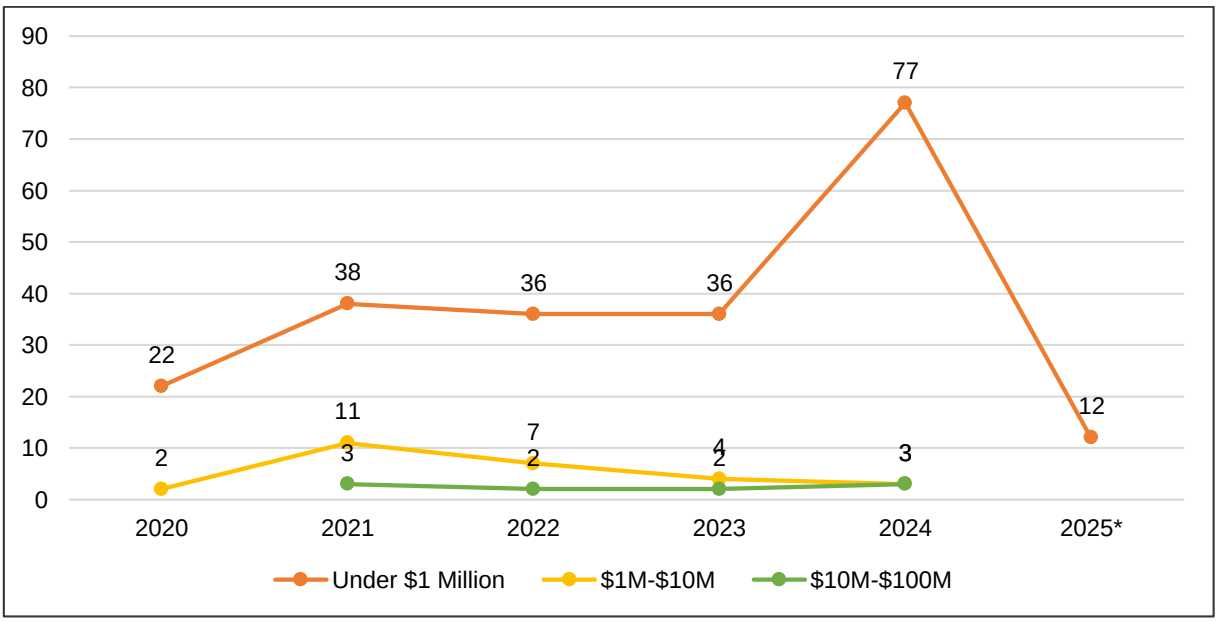
*Reflects data for the first 6 months of 2025.
Source: StartupCentrum, 2025.

According to StartupCentrum data, Ankara's entrepreneurial investments followed a fluctuating trend between 2021 and 2025. Investments:

- In 2021, 52 transactions totaling $75.3 million,
- In 2022, 45 transactions worth $57.2 million,
- In 2023, 42 transactions totaling $51.8 million,
- In 2024, it peaked at $113.9 million with 83 transactions.

However, the picture changed sharply in the first half of 2025: only 14 transactions and $6.4 million in investments were made, which is well below the previous year's levels. TÜBİTAK BiGG investments fell from 62 to 4, while private sector investments fell from 21 to 10, indicating a serious contraction in Ankara's investment ecosystem.

Figure 17: Investment Amounts in Ankara by Year



*Reflects data for the first 6 months of 2025.
Source: StartupCentrum, 2025.

When examining the distribution of investments in Ankara Province by amount, it is seen that investments in the 2020–2023 period largely consisted of small-scale (under $1 million) transactions, while high-value investments remained limited. The year 2024 was a period marked by an increase in investment volume, with a concentration of small-scale investments and a significant rise in medium and large-scale transactions. However, in the first half of 2025, the picture underwent a sharp transformation, with both the number of transactions and the variety of amounts decreasing significantly, and only small-scale investments taking place to a limited extent. This picture shows that Ankara's entrepreneurial ecosystem still has a fragile capacity to attract sustainable and scalable investments.

Although Ankara's entrepreneurship ecosystem has high growth potential, but it needs support mechanisms to ensure continuity on the investment side. While hardware and IoT-based startups gaining global visibility is a significant advantage, the limited availability of early-stage financing opportunities constrains the ecosystem's development. Integrating the city's strong university and technopark infrastructure more effectively with commercialization mechanisms, increasing the appeal for international investors, and highlighting Ankara's advantages of low-cost, secure, and highly educated workforce are considered key strategic directions that will increase the competitiveness of the ecosystem.

Ankara is one of Turkey's most intensive centers in terms of R&D and design capacity. According to data from the Ministry of Industry and Technology, a total of 162 R&D centers operate in the city. This number makes Ankara a competitive innovation center not only on a national scale but also at the regional level.

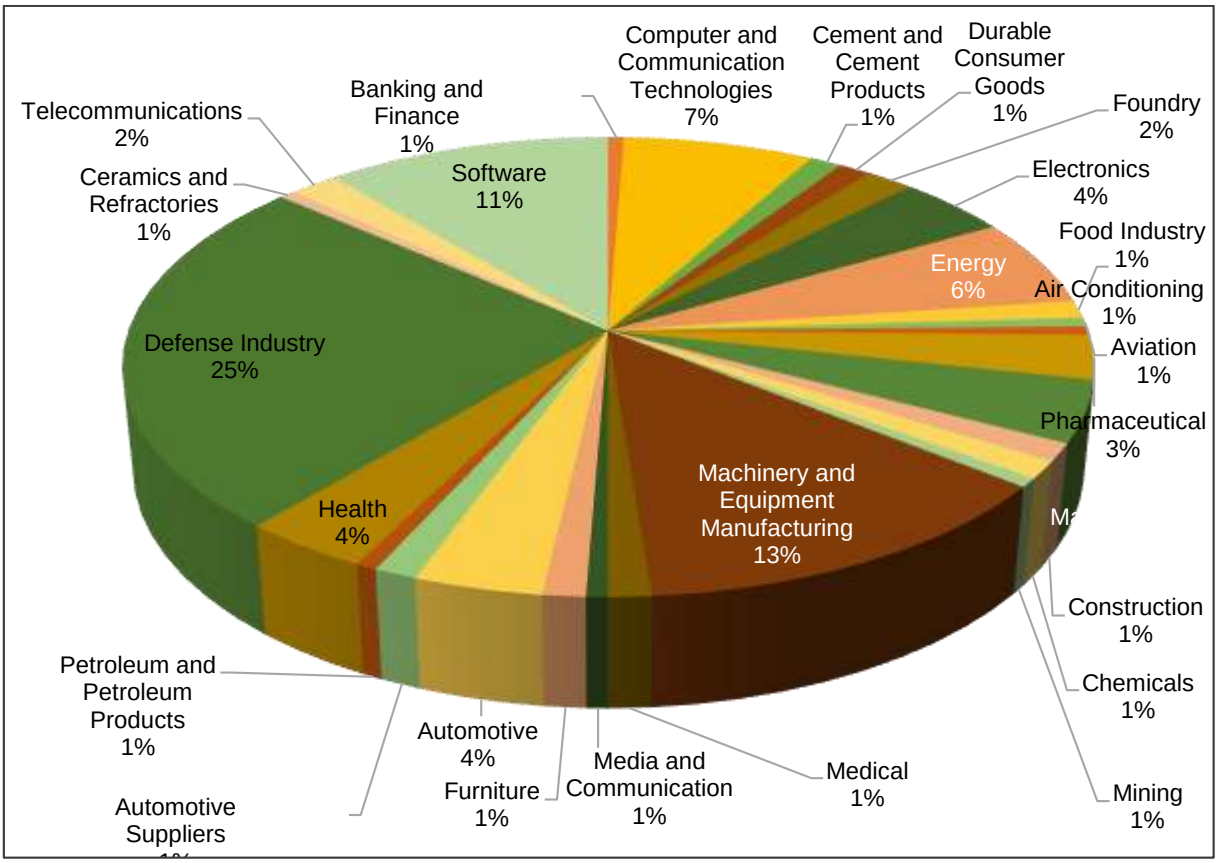
Table 29: Distribution of R&D Centers in Ankara by Sector

Sector	Number of R&D Centers
Defense Industry	41
Machinery and Equipment Manufacturing	21
Software	18
Computer and Communication Technologies	12
Energy	10
Manufacturing Industry	7
Electronics	7
Pharmaceutical	5
Automotive	6
Health	6
Foundry	3
Telecommunications	3
Cement and Cement Products	2
Durable Consumer Goods	2
Food Industry	2
Construction	2
Chemical	2
Medical	2
Furniture	2
Automotive Suppliers	2
Banking and Finance	1

Aviation	1
Air Conditioning	1
Mining	1
Media and Communication	1
Oil and Petroleum Products	1
Ceramics and Refractories	1
Total	**162**

Source: Prepared from data provided by the Ministry of Industry and Technology, 2025.

Figure 18: Sectoral Distribution of R&D Centers in Ankara



Source: Prepared from data provided by the Ministry of Industry and Technology, 2025.

The sectoral distribution of R&D centers reveals the city's technological specialization trends. The defense industry ranks first with 25%, followed by machinery and equipment manufacturing (13%) and the software sector (11%). Computer and communication technologies (7%) and energy and manufacturing industries (approximately 6%) form medium-sized clusters, while electronics, healthcare, automotive, and pharmaceutical sectors are represented in the 4–5% range. This picture shows that Ankara has established an R&D ecosystem based primarily on defense, machinery and equipment, and software, while also growing increasingly strong in strategic sectors of the future such as information and communication and energy.

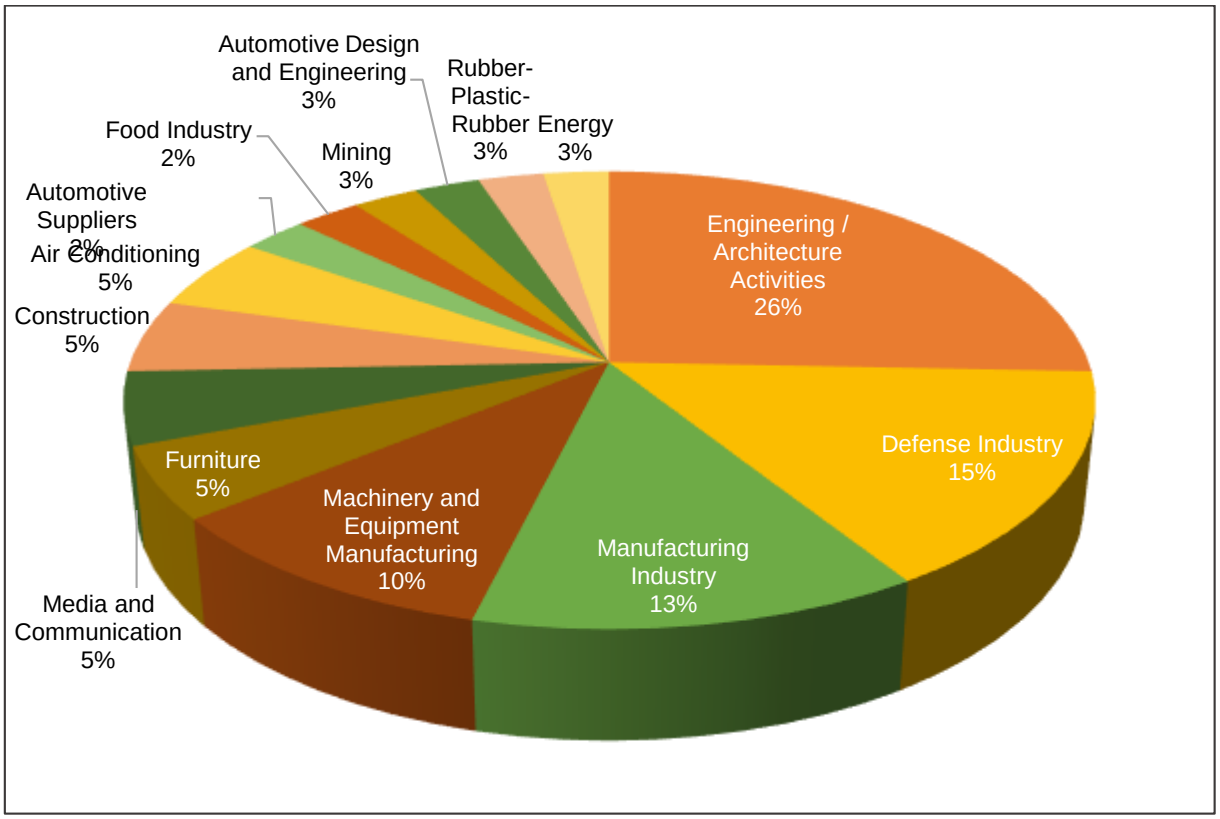
Another element that completes the R&D capacity is the 39 design centers in Ankara. Twenty-six percent of the design centers are active in engineering and architecture, 15% in the defense industry, 13% in the manufacturing industry, and 10% in machinery and equipment manufacturing. The furniture, media-communication, construction, and air conditioning sectors account for around 5% of the total, while the energy, plastics-rubber, automotive, and food industries are limited but provide diversity.

Table 30: Design Centers in Ankara

Sector	Number of Companies
Engineering/Architecture Activities	10
Defense Industry	6
Manufacturing Industry	5
Machinery and Equipment Manufacturing	4
Furniture	2
Media and Communication	2
Construction	2
Air Conditioning	2
Automotive Supplier Industry	1
Food Industry	1
Mining	1
Automotive Design and Engineering	1
Rubber-Plastic-Rubber	1
Energy	1

Source: Prepared from data provided by the Ministry of Industry and Technology, 2025.

Figure 19: Sectoral Distribution of Design Centers in Ankara



Source: Prepared using data from the Ministry of Industry and Technology, 2025.

This sectoral distribution of Design Centers indicates that Ankara's R&D and design capacity is structured to combine advanced production technologies with software-intensive solutions. The scale and experience achieved in the defense industry, integrated with machinery and equipment manufacturing and software-based solutions, enables the development of high value-added products.

This situation positions Ankara as a strategic innovation center not only on a national scale but also at a regional and global level.

Furthermore, Ankara has one of Turkey's most intensive technology park networks. The city has 14 technology development zones affiliated with different universities and institutions. The process, which began with the establishment of ODTÜ Teknokent in 2000, quickly expanded with pioneering centers such as Bilkent Cyberpark and Hacettepe Teknokent, creating strong expertise in high-tech fields such as software, electronics, health, and aviation.

Table 31: Technology Parks (Technoparks) in Ankara

Name	Affiliated Institution	Fields of Activity	Status	Year Established
Middle East Technical University Technology Development Zone	Middle East Technical University	Software-IT, Electronics, Mechanical Engineering and Design, Medical Technologies, Energy and Environment, Advanced Materials, Agriculture, Food, Aerospace, Automotive.	Active	2000
Bilkent Cyberpark (Ankara Technology Development Zone)	Bilkent University	Software, Electronics & Magnetics, Aerospace, Medical Technologies, Environment, Consulting Services.	Active	2002
Hacettepe University Technology Development Zone	Hacettepe University	Software, Defense Industry and Aviation, Health, Medical, Pharmaceuticals, Electronics, Energy, Construction, Consulting, Food, Mining, Media, Automotive, Machinery, Nanotechnology.	Active	2003
Ankara University Technology Development Zone	Ankara University	Agriculture, Biotechnology, Electronics, Defense Industry, Forestry.	Active	2006
Gazi Technopark Technology Development Zone	Gazi University	Software, Electronics, Mechatronics, Nanotechnology, Energy, Biomedical, Business Services.	Active	2007
ASO Technopark Technology Development Zone	TOBB Economics and Technology University	Software, Energy R&D, Health.	Active	2008
Ankara Technopark Technology Development Zone	Yıldırım Beyazıt University	Software, Information Technology, Mechanical Engineering, Electrical and Electronics Engineering, Medical Engineering.	Active	2014
OSTIM Ekopark Technology Development Zone	Ankara University Hacettepe University Atılım University	Software, Defense Industry, Energy, Electronics, Machinery.	Active	2014

	Çankaya University Başkent University TOBB University of Economics and Technology			
Teknohab Technology Development Zone	Gazi University	Aerospace, Sustainable Technology.	Active	2018
ASBU (Sosyokent) Social Innovation and Entrepreneurship Technology Development Zone	Ankara University of Social Sciences	Software, Information Technology, Consulting.	Active	2019
Ankara Yıldırım Beyazıt University Technology Development Zone	Ankara Yıldırım Beyazıt University	-	Under construction	2022
TOBB University of Economics and Technology Technology Development Zone	TOBB University of Economics and Technology	-	Under construction	2023
Ankara Science University Technology Development Zone	Ankara Science University	-	Under construction	2023
Middle East Technical University Space Technologies Technology Development Zone	Middle East Technical University	-	Under construction	2023

Source: Ministry of Industry and Technology, 2025.

After 2010, structures integrated with industry, such as OSTIM Ekopark and Teknohab, were added; the clustering approach in the fields of defense industry, energy, and sustainable technology came to the fore. ASBÜ Sosyokent, established more recently, has brought a new approach focused on social innovation and entrepreneurship.

Technoparks in Ankara are concentrated in the areas of software, defense, health, and energy; early-generation technoparks support the city's competitive structure in high-tech production, while new-generation technoparks focus on sustainability and entrepreneurship.

Complementing the strong R&D and entrepreneurship infrastructure created by technoparks, numerous Technology Development Centers (TEKMER) also operate in Ankara. TEKMERs are centers that provide support such as office space, technical infrastructure, mentoring, training, and investor access that technology-based startups need from the early stages to commercialization.

The TEKMER model, developed by KOSGEB since the 1990s, has spread in Ankara through collaborations between universities, public institutions, and the private sector. Unlike technoparks, TEKMERs focus on small-scale startups thanks to their more flexible structures and support the entrepreneurial ecosystem with advantages such as rent support, infrastructure usage, and operational conveniences. There are a total of 10 TEKMERs based in Ankara, listed below:

- Ankara TEKMER Technology Development Center Inc.
- Ardventure TEKMER Technology Development Center Inc.
- Başkent University BİYOTEK Technology Development Center Inc.
- Bilkent TEKMER Technology Development Center Inc.
- GarajX Ankara Young Entrepreneurs Technology Development Center Inc.
- Lokman Hekim Technology Inc.
- Medipol Meditek Technology Development Center Inc.
- NetZero TEKMER Technology Development Center Inc.
- Orion TEKMER Ankara Technology Development Center Inc.
- Health Sciences University Technology Development Center Inc.

There are TEKMERs in Ankara that focus on different sectors and themes. These structures accelerate the development of entrepreneurs across a wide range of fields, from biotechnology and health technologies to software and energy.

Along with Ankara's technoparks, TEKMER structures are also strategic actors that strengthen the city's innovative entrepreneurship capacity. This holistic structure reinforces Ankara's competitive position on a national and global scale, not only in advanced technology production but also in the development of early-stage startups.

According to the Provincial Technological Development Index (ASO-İLTEK) report prepared by the Ankara Chamber of Industry, Ankara is Turkey's most technologically advanced province. Ankara ranks first in sub-indicators such as technological infrastructure, research and innovation capacity, quality of life, and labor force attractiveness, leaving behind industrial centers such as Istanbul, Eskisehir, and Kocaeli. The data reveals that Ankara is not only an administrative capital but also the country's capital of science, technology, and prosperity.

Ankara is also a leader in high-tech exports. As of 2024, 12.1% of Ankara's total exports consist of high-tech products, which is nearly four times the Turkish average of 3.6%. It demonstrates strong export performance in strategic products such as defense and aviation products, as well as measurement, control, testing, and navigation devices. With high-tech exports worth $1.7 billion, Ankara accounts for one-fifth of Turkey's total exports.

Ankara is also noteworthy in terms of foreign trade balance. As one of the provinces with the lowest foreign trade deficit in high-tech exports (49%), Ankara ensures the sustainability of technology-focused production and exports.

Ankara's superiority is not limited to export figures. According to the Turkish Statistical Institute's (TÜİK) socio-economic development report, Ankara is the province with the highest socio-economic level in Turkey. Furthermore, approximately one-third (29.7%) of Turkey's R&D expenditures take place in Ankara. These figures demonstrate that the city has a strong ecosystem for attracting skilled labor and transferring scientific and technological innovations into production processes.

Ankara's investment strategy should be based on this strong technology and innovation base. Its high-tech production capacity, strong R&D infrastructure, and quality of life advantage that supports international competitiveness make Ankara a strategic center for both domestic and foreign investors. In the coming period, effectively leveraging these advantages will elevate Ankara to higher levels in global value chains.

Another key indicator reflecting Ankara's innovation capacity is intellectual property applications. According to data from the Turkish Patent and Trademark Office, patent applications in Ankara showed a steady upward trend between 2020 and 2024. The number of applications, which was 1,057 in 2020, rose to 1,841 in 2024, marking significant growth in this area. Ankara ranked second in Turkey during

this period, after Istanbul, while Izmir remained in third place. This picture confirms Ankara's increasing productivity, particularly in R&D and technology-intensive sectors.

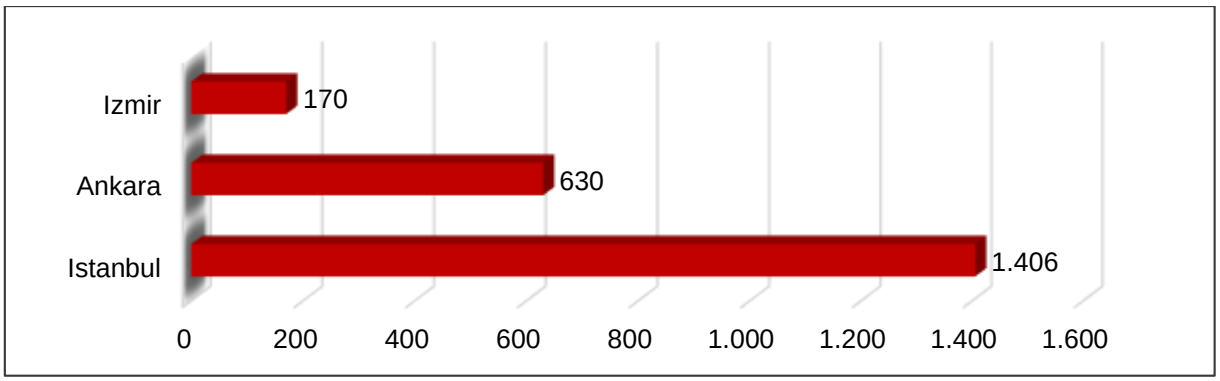
Table 32: Patent Applications by Year — Istanbul, Ankara, Izmir

Provinces	2020	2021	2022	2023	2024
Istanbul	3,413	3,582	3,404	3,526	3,853
Ankara	1,057	1,117	1,172	1,327	1,841
Izmir	473	471	451	429	434

Source: Turkish Patent and Trademark Office, 2025.

According to the data in the table, Istanbul had the highest number of patent applications in the 2020–2024 period, followed by Ankara in second place and Izmir in third place. Although the numbers in Istanbul fluctuated over the years, they reached their highest level in 2024 with 3,853. In Ankara, a steady upward trend is noticeable, with the number rising from 1,057 in 2020 to 1,841 in 2024, showing significant growth. In Izmir, a general downward trend is observed, with the number falling from 473 in 2020 to 434 in 2024.

Figure 20: Number of Registrations in Istanbul, Ankara, and Izmir



Source: Turkish Patent and Trademark Office, 2025.

Hata! Başvuru kaynağı bulunamadı. presents a comparative overview of registration numbers in I stanbul, Ankara, and Izmir. Istanbul leads by a clear margin in terms of transaction numbers and maintains its leadership at the national level. Ankara holds a strong second position, demonstrating its status as the most important center for intellectual property applications after Istanbul. Izmir, on the other hand, remains at a more limited level in third place. This distribution shows that Ankara has become an increasingly powerful center in the field of intellectual property, even in an environment where Istanbul maintains its dominance, while Izmir contributes on a smaller scale.

Table 33: Types and Numbers of Registered Intellectual Property Assets in Ankara

Registration Type	Numbers	
	2023	2024
Patent	418	630
Utility Model	165	332
Trademark	10,206	10,779

Source: Turkish Patent and Trademark Office, 2025.

Parallel to the increase in patent applications, a positive trend is also seen in registration data. In the 2023–2024 period, patent registrations in Ankara increased from 418 to 630, while utility model registrations rose from 165 to 332, nearly doubling. Trademark registrations showed the highest

numerical increase, rising from 10,206 to 10,779. These developments reveal Ankara's growing tendency to protect and commercialize innovative ventures.

Table 34: Number of Design Registrations in Ankara

	2023		2024	
	Number of Files	Number of Designs	Number of Files	Number of Designs
Design Registration Count	944	3,458	813	2,439

Source: Turkish Patent and Trademark Office, 2025.

A different picture emerges when it comes to design registrations. While 3,458 design registrations were made in 944 files in 2023, this number fell to 2,439 designs in 813 files in 2024. This decline indicates a slowdown in design-focused registration activities, particularly among small and medium-sized enterprises. This decline can be attributed to cost factors or changes in application behavior.

Table 35: Monthly Distribution of Patent Applications in Ankara (2025)

	January	February	March	April	May	June
Ankara	66	104	97	104	110	119

Source: Turkish Patent and Trademark Office, 2025.

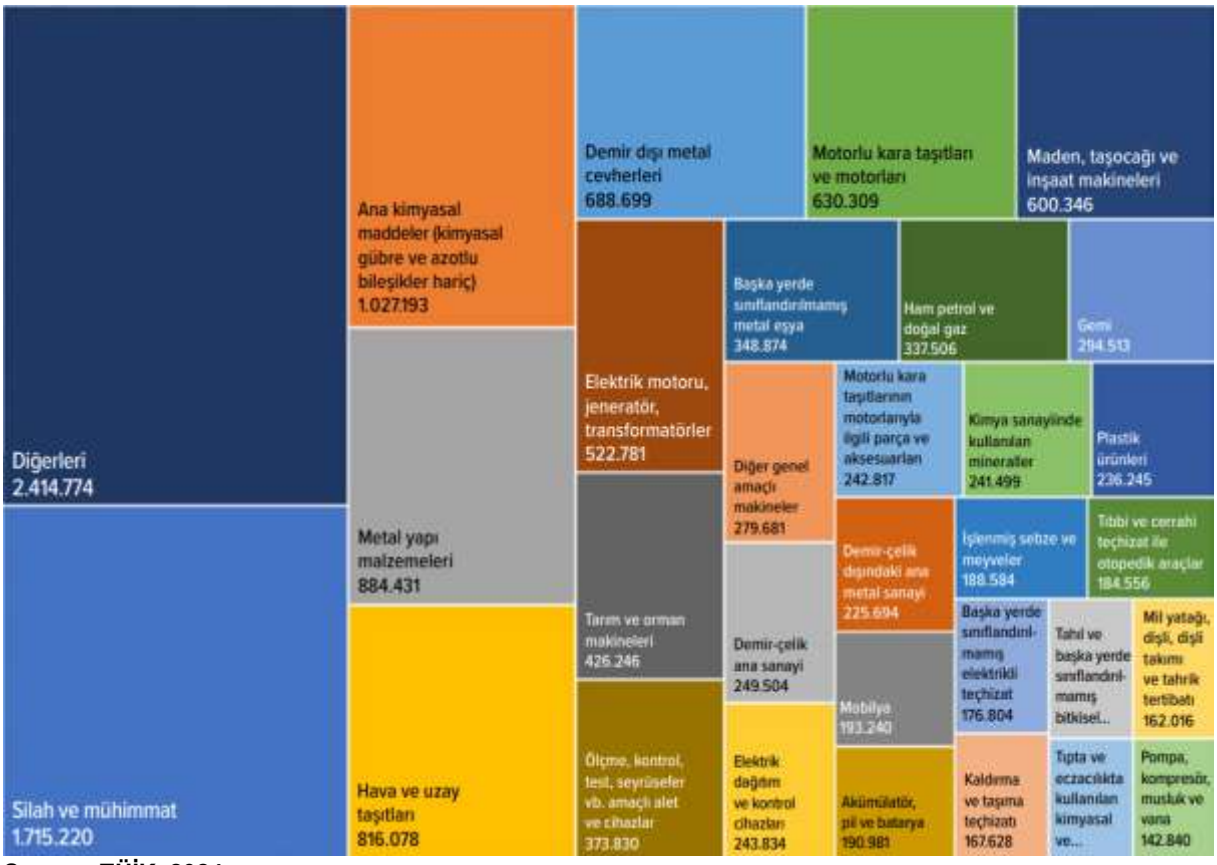
Looking at the first six months of 2025, it is seen that patent applications in Ankara continue to increase. The number of applications, which was 66 in January, rose to 119 in June, and there was a remarkable growth in the total number of applications in the first half of the year. The data shows that the concrete outputs of Ankara's R&D activities, particularly in the defense industry, software, and machinery and equipment manufacturing, have begun to be reflected in the field of intellectual property.

Ankara has gained strong momentum in the field of intellectual property. The increase in patent and trademark registrations is directly related to the productivity of R&D and design centers in the city. However, the decline in design registrations indicates that creative industries and design-focused production activities need to be further encouraged in the innovation ecosystem. Therefore, it is critically important to develop a balanced approach to strengthening Ankara's intellectual property capacity, including both patent support for technology-intensive sectors and design and trademark registration mechanisms covering creative sectors.

This increase in intellectual property capacity is also reflected in foreign trade performance. Technological gains achieved in R&D-intensive sectors have increased the weight of high value-added products in Ankara's export composition.

As of 2024, Ankara's total exports amounted to $14.5 billion. When the distribution of exports by product group is examined, the highest volume was in the arms and ammunition category, with $1.7 billion. This group was followed by basic chemicals with 1.02 billion dollars, metal construction materials with 884 million dollars, air and space vehicles with 816 million dollars, non-ferrous metal ores with 688 million dollars, and motor vehicles and engines with 630 million dollars.

Figure 21: Top 30 Export Products of Ankara (x1000 USD; 2024)

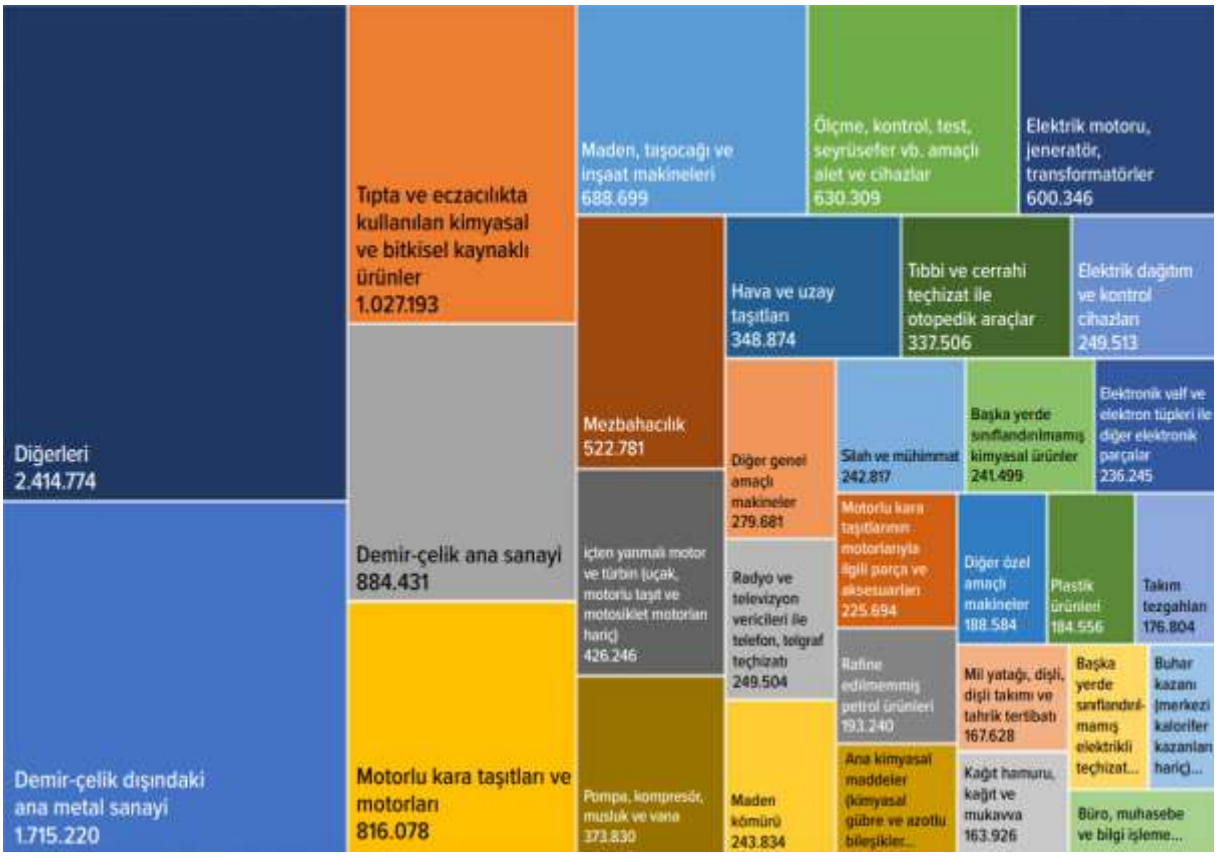


Source: TÜİK, 2024.

The top 10 product categories account for more than half of Ankara's exports. This table shows that, in addition to high value-added defense and aviation products, the chemical, metal, and machinery sectors are also decisive in the city's exports. In particular, the fact that air and space vehicles ranked fourth in 2024 reveals that Ankara's defense and advanced technology-based production capacity is strongly reflected in its foreign trade performance.

Ankara's total imports amounted to $17.6 billion in 2024. In terms of product groups, the highest import item was the non-iron and steel primary metal industry, with 1.7 billion dollars. This was followed by chemical and plant-based products used in medicine and pharmacy, with 1.02 billion dollars, and the iron and steel primary industry, with 884 million dollars. The top 10 products also include motor vehicles and engines, electrical machinery and equipment, measuring and control instruments, mining and quarrying machinery, and refined petroleum products.

Figure 22: Top 30 Import Products of Ankara (x1000 USD; 2024)

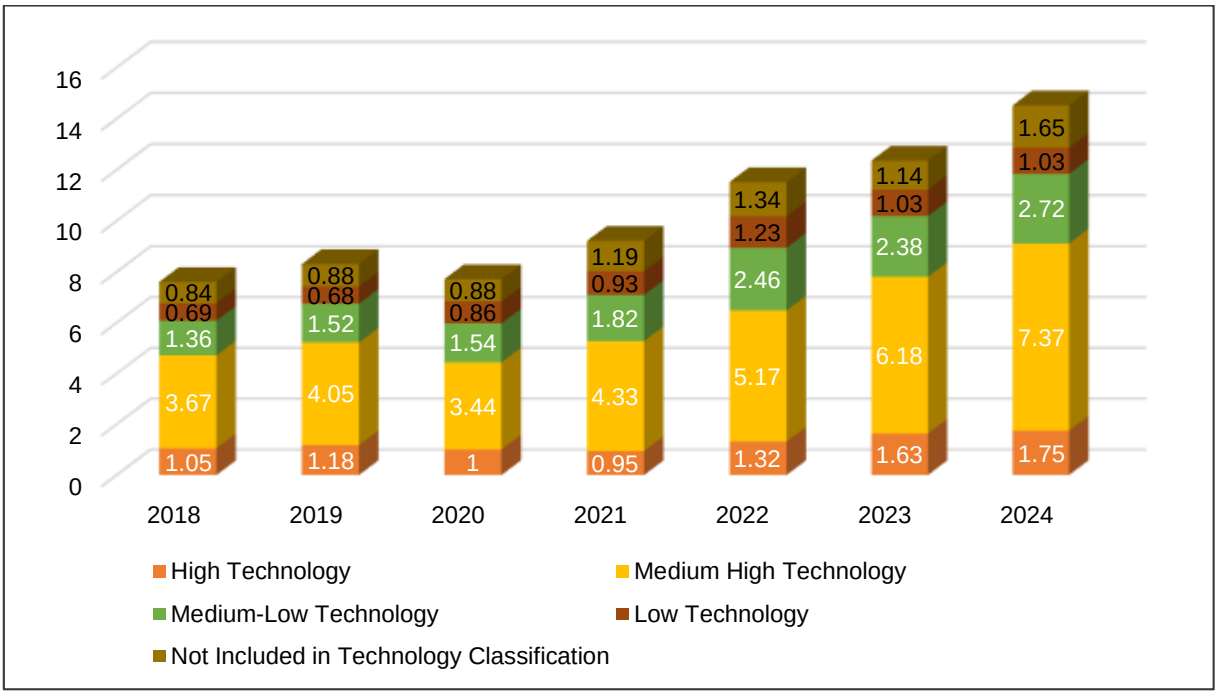


Source: TÜİK, 2024.

While cereals and vegetable products were the highest import item in 2023, the metal and chemical sectors gained prominence in 2024. The share of the top 10 product groups in total imports rose to 43%, indicating that imports continue to be concentrated in certain product groups. In particular, the significant share of medical and surgical devices and measuring and testing devices, which fall into the high-tech category, in imports indicates Ankara's dependence on foreign countries for advanced production processes.

Compared to Turkey as a whole, Ankara's import structure shows a similar trend. The main metal industry, excluding iron and steel, motor vehicles, and refined petroleum products are the leading items in both Turkey's and Ankara's imports. This table reveals that Ankara's industrial production is in a parallel dependency relationship with the national production structure in terms of the inputs it uses.

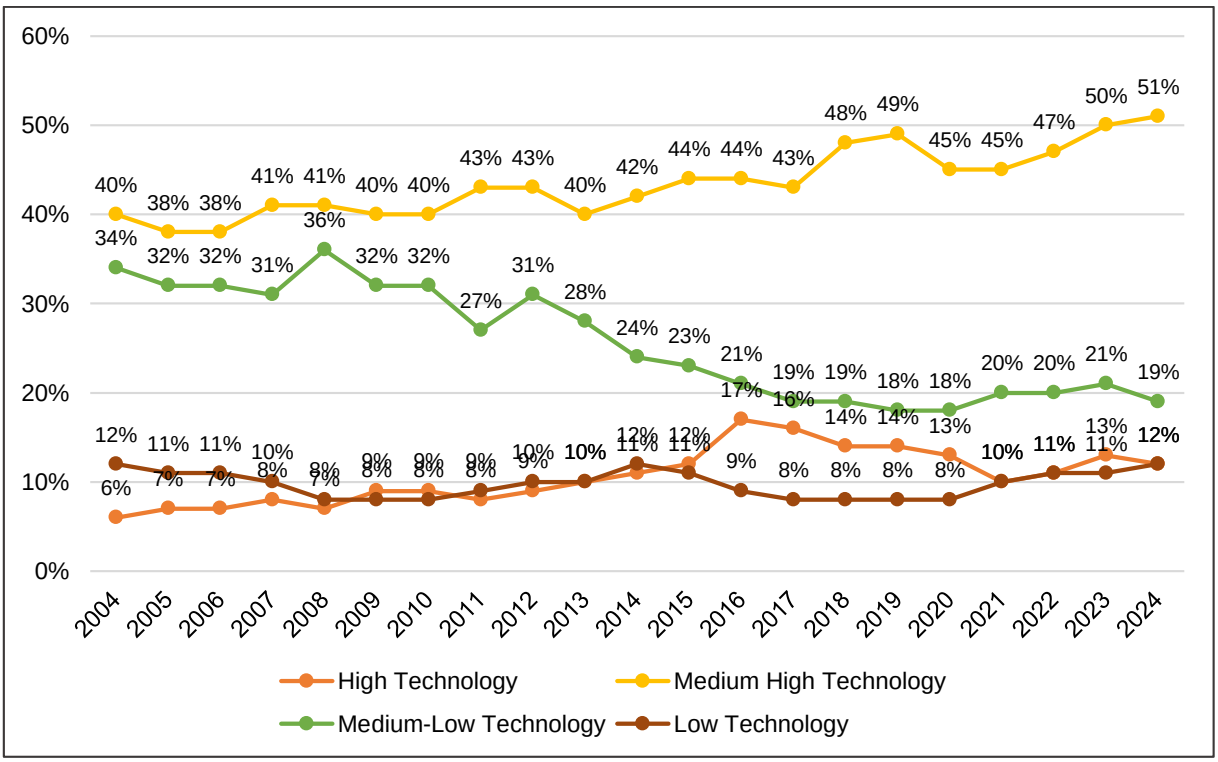
Figure 23: Ankara's Exports by Technology Classification (Billion USD)



Source: ASO, 2025.

The distribution of Ankara's exports by technology class shows a marked increase in technology intensity in recent years. Total exports, which stood at $7.6 billion in 2018, rose to $14.5 billion in 2024, with medium-high technology products being the main source of this increase. The medium-high technology category, which stood at $3.7 billion in 2018, reached $7.37 billion in 2024, accounting for more than half of total exports (51%). These figures reveal that medium-high technology products have gained strategic importance in Ankara's export composition.

Figure 24: Technology Shares in Ankara's Exports (2004–2024)



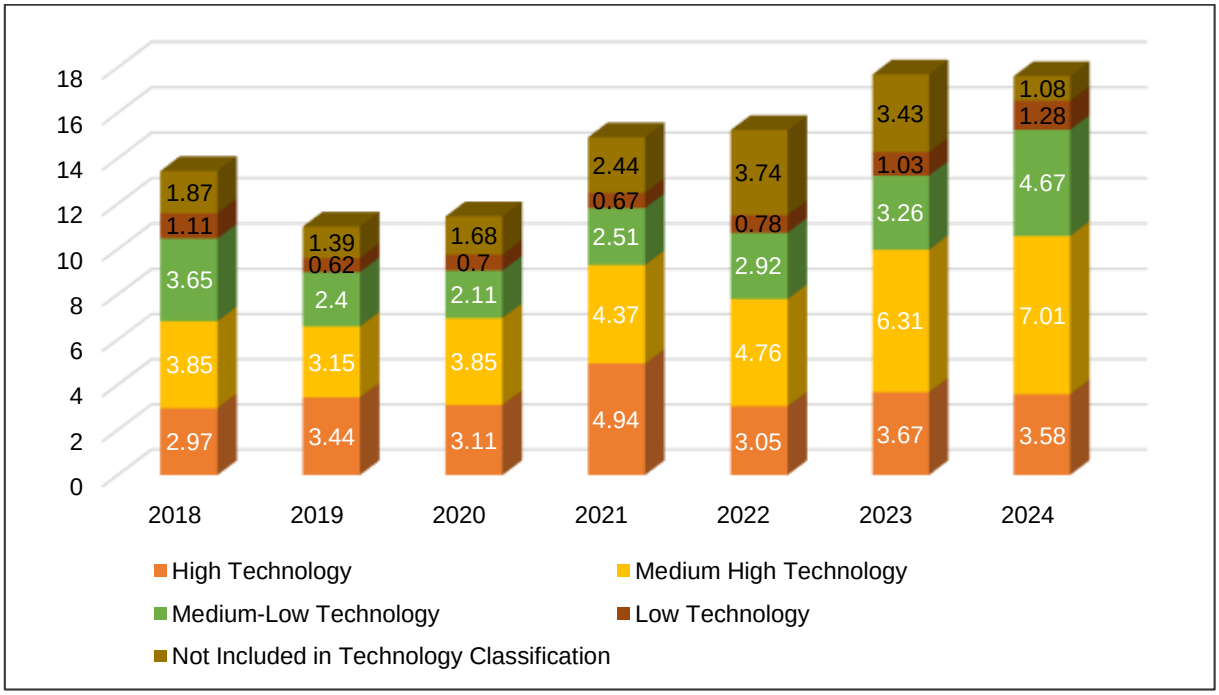
Source: ASO, 2025.

Medium-low technology exports rose from $1.36 billion in 2018 to $2.72 billion in 2024; however, their share declined from 34% to 19% over the long term. This confirms that, despite the increase in absolute values, higher technology groups have come to the fore in Ankara's exports. Exports of low-tech products remained relatively limited throughout the period, accounting for 7% of total exports at $1.03 billion as of 2024.

High-tech product exports have been a notable growth area for Ankara. High-tech exports, which stood at $1.05 billion in 2018, rose to $1.75 billion in 2024, with their share increasing from 6% in 2004 to 12% in 2024. This increase particularly supports Ankara's competitiveness in sectors such as defense, aviation, and medical devices.

It is seen that medium-high and high-tech products account for a total share of 63% of Ankara's exports, which is well above the Turkish average (35%). The results reveal that the city's industrial structure has shifted towards higher value-added production and has a significant advantage in terms of international competitiveness.

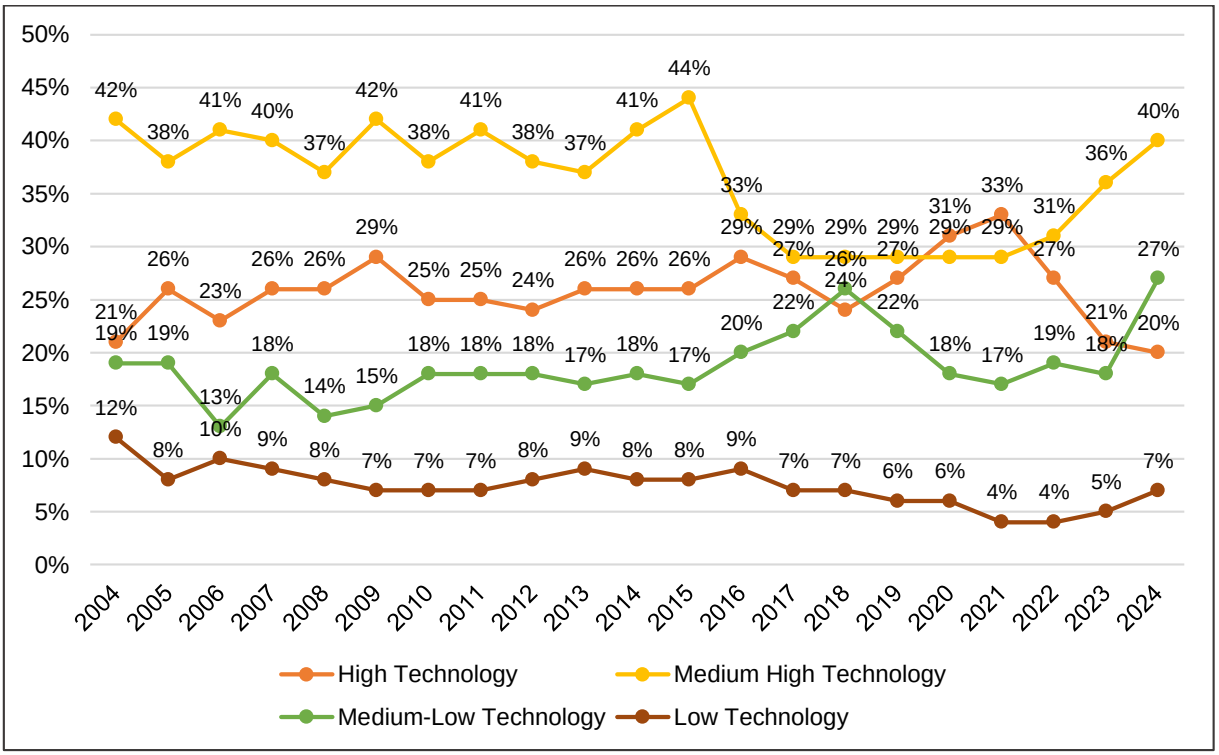
Figure 25: Ankara's Exports by Technology Classification (Billion USD)



Source: ASO, 2025.

Ankara's import structure reached $17.6 billion in 2024 and showed diversity in terms of technology classes. Medium-high technology products accounted for the highest share of imports at $7 billion, followed by medium-low technology products at $4.7 billion. Imports of high-tech products amounted to $3.6 billion, while low-tech products reached $1.28 billion. Examining the 2018–2024 period, a steady increase in medium-high tech products is observed, while high-tech imports peaked at $4.9 billion in 2021 and then declined.

Figure 26: Technology Shares in Ankara's Imports (2004–2024)



Source: ASO, 2025.

Proportional data also supports this picture. While 21% of Ankara's imports consisted of high-tech products in 2004, this ratio fluctuated over the years, reaching 33% in 2021 and 20% in 2024. The share of medium-high technology products showed an upward trend in the long term, rising to 40% in 2024 and becoming the dominant category. Medium-low technology imports rose from 19% in 2004 to 27% in 2024, while low-technology products remained below 10% throughout the period, accounting for a limited share.

This picture reveals Ankara's increasing dependence on medium-high technology products in its imports. In particular, intensive imports of production inputs such as machinery, electrical equipment, automotive, and chemicals show that the city's industrial structure has developed in high value-added sectors while maintaining its dependence on foreign countries. The decline in imports of high-tech products can be attributed to the partial increase in domestic production capacity in areas such as defense and aviation.

Ankara's competitiveness is reinforced by its strong R&D infrastructure, the human capital created by higher education institutions, and the innovation ecosystem developing through technoparks and design centers. The increase in patent and trademark registrations, the progress recorded in the entrepreneurial ecosystem, and the rising share of technology-intensive exports reveal the city's high value-added production potential. However, the limited capacity to attract international investment, the unemployment rate, and quality of life indicators point to areas where Ankara needs to strengthen. Strengthening access to finance for innovative ventures, supporting creative industries, and implementing more ambitious policies to attract global talent are critical to sustainably increasing competitiveness. These strategic orientations will make Ankara one of the centers of advanced technology and innovation not only nationally but also regionally and globally.

2.5. Industry and Commerce

Beyond its identity as the capital city, Ankara plays a critical role in the development of industry and trade within the country's economy. The city stands out as one of Turkey's most dynamic economic centers with its production capacity, diversified business structure, strong institutional organizations, and rapidly developing service infrastructure. The broad institutional structure, ranging from industrial enterprises to organized industrial zones, small industrial sites, chambers, and stock exchanges, shapes the city's production and trade ecosystem and strengthens its national competitiveness. This section examines Ankara's industrial and commercial structure, employment, business distribution, organizational models, and foreign trade performance through data, revealing the strengths and weaknesses of the province's economic structure.

Table 36: Industrial Enterprises in Ankara

Business Size (Based on Number of Employees)	Industrial Enterprises with Industrial Registry Certificates	Employment (Persons)	Ankara's Share in Turkey's Industrial Employment (%)
250 and Above (Large)	154	64,279	5.90
101-250	342	30,207	4.70%
51-100 Range (Medium)	470	21,376	5.30
21-50 (Small)	1,174	24,560	5.50
11-20	861	9,334	5.10%
1-10 (Micro)	2,818	12,284	7.90%
Total	**5,819**	**162,040**	**5.60%**

Source: TOBB-Industry Database Provincial Reports, 2025.

The distribution of industrial registry certificate-holding businesses in Ankara shows that the structure is dominated by micro businesses. Although businesses with 1–10 employees make up approximately half of all businesses, their contribution to employment is limited. In contrast, medium and large-scale businesses, despite their limited number, account for a large portion of industrial employment. Businesses with 250 or more employees alone account for approximately 40% of total employment.

Ankara accounts for 5.6% of Turkey's industrial employment. While micro businesses have a higher share of employment than the national average, large businesses have a relatively lower share. The data reveals that the city's industrial structure is fueled by a large number of small businesses, but its production capacity and employment impact rely on large-scale businesses.

Table 37: Organized Industrial Zones (OSBs) in Ankara

	OIZ Title	Type of OSB	Current Status	Ministry Granting Establishment Approval	OIZ Area (Hectares)	Total Number of Parcels	Occupancy Rate (%)
1	Anatolia	Mixed	In Operation	Ministry of Industry and Technology	398.00	213	100.0
2	Ankara Foundry Specialists	Specialization	In operation		117.00	61	95.1
3	Ankara Chamber of Industry 2nd and 3rd	Mixed	In operation		1,074.56	468	65.4

4	Ankara Chamber of Industry I.	Mixed	In operation		1,883.60	329	99.4
5	Ankara Space and Aviation Specialization	Specialization	In operation		723.00	154	100
6	Ankara-Çubuk TDİ (Livestock)	TDİOSB	In operation	Ministry of Agriculture and Forestry	255	103	78.6
7	Ankara-İvedik	Mixed	In operation	Ministry of Industry and Technology	477	6972	99.3
8	Capital	Mixed	In operation		1,865.00	561	90.4
9	Beypazarı	Mixed	Expropriation in Progress		130.00	79	0
10	Elmadağ Furniture Specialists	Specialized	In operation		116.00	94	79.8
11	OSTIM	Mixed	In operation		476.00	4459	100.0
12	Polatlı	Mixed	In operation		302.00	154	57.1
13	Polatlı Chamber of Commerce	Mixed	In operation		424.36	138	71.7
14	Şereflikoçhisar	Mixed	In operation		134.94	55	74.5

Source: OSBÜK, 2025.

There are numerous mixed and specialized industrial zones operating in Ankara. In terms of area size, ASO 1st Industrial Zone (1,883 ha), ASO 2nd-3rd Industrial Zone (1,074 ha), and Başkent Industrial Zone (1,865 ha) are at the center of large-scale industrial investments with their extensive areas. These regions represent Ankara's high-capacity production and investment areas. In terms of specialization, Ankara Space and Aviation Specialized Industrial Zone (723 ha) strengthens Ankara's position in the defense and aviation industries, while Elmadağ Furniture Specialized Industrial Zone (116 ha) contributes to sectoral diversification. In addition, the Ivedik OIZ stands out as the region with the highest operational capacity, boasting 6,972 plots.

Occupancy rates are generally high, with many OSBs operating at occupancy rates above 90%. Regions such as OSTİM and Anadolu OIZ have reached 100% occupancy rates. The current situation reveals that organized industrial zones in Ankara are a strong center of attraction for investors. On the other hand, the fact that Beypazarı OIZ is in the expropriation phase demonstrates Ankara's potential to expand its industrial areas and create new production centers.

Table 38: Small Industrial Estates in Ankara

	Establishment Name	Current Number of Workplaces	Occupancy Rate (%)
1	Ostim SS	3,000	95.0
2	Provincial Lumber Merchants SS	164	84.1
3	Ankara Central Woodworking SS	445	100.0
4	Foundry Workers Site Management Cooperative	220	83.6
5	Beypazarı Carpenters SS	143	100.0
6	Şereflikoçhisar SS	250	84.0
7	New Haymana SS	100	52.0

8	Kizilcahamam SS	115	72.2
9	Polatlı Carpenters and Furniture Makers SS	40	62.5
10	Polatlı Bilgen Cooperative	260	100.0

Source: Ministry of Industry and Technology, 2022.

Small industrial sites in Ankara are important structures that support the city's local production capacity and form the basic infrastructure for small-scale industrial activities. Among these sites, OSTİM SS stands out in terms of scale and density with 3,000 workplaces and a 95% occupancy rate. In addition, Ankara Central Woodworking Industrial Site (445 workplaces) and Beypazarı Carpenters Industrial Site (143 workplaces) operate at 100% occupancy rates, reflecting a high level of specialization, particularly in sectors such as carpentry, furniture, and woodworking.

Occupancy rates are relatively low in some industrial sites. Yeni Haymana SS (52%) and Polatlı Carpenters and Furniture Makers SS (62.5%) are examples of this situation, revealing that the capacity utilization of small industrial sites varies across different parts of the city.

Table 39: Number of Chambers and Commodity Exchanges in Türkiye

Chamber/Exchange Type	Province	District	Total
Chamber of Commerce and Industry	69	117	186
Chamber of Commerce	12	40	52
Chamber of Industry	12	-	12
Chamber of Maritime Commerce	2	-	2
Chamber of Commerce	59	55	114

Source: TOBB, 2024

The most common type of organization in Turkey is chambers of commerce and industry, with a total of 186 chambers operating in 69 provinces and 117 districts. This is followed by 114 commodity exchanges and 52 chambers of commerce, which play a regulatory role, particularly in agricultural production and product trade. Maritime chambers of commerce, on the other hand, are the least common type of organization, with only two. The data reveals that the structure of chambers and exchanges in Turkey is spread across a wide geographical area and shows diversity based on the institutional representation of the industrial, commercial, and agricultural sectors.

Table 40: Number of Chambers and Commodity Exchanges in Ankara

Chamber/Exchange Name	District
Ankara Chamber of Industry	Çankaya
Ankara Trade Exchange	Yenimahalle
Ankara Chamber of Commerce	Çankaya
Beypazarı Chamber of Commerce	Beypazarı
Çubuk Commodity Exchange	Çubuk
Haymana Commodity Exchange	Haymana
Haymana Chamber of Commerce	Haymana
Polatlı Trade Exchange	Polatlı
Polatlı Chamber of Commerce	Polatlı
Şereflikoçhisar Chamber of Commerce	Ş.Koçhisar

Source: TOBB, 2025.

The chamber and exchange structure in Ankara is not only located in the central districts, but also extends to the surrounding districts where agriculture and trade are prominent. While the Ankara Chamber of Industry and the Ankara Chamber of Commerce represent the capital's economy in Çankaya, the Ankara Commodity Exchange operates in Yenimahalle. In the surrounding districts, there are chambers of commerce and/or exchanges in Beypazarı, Polatlı, Haymana, Çubuk, and Şereflikoçhisar. This structure demonstrates that the Ankara economy is based not only on services and industry but also on strong agricultural production and regional trade networks.

Table 41: Fair and Exhibition Statistics for Ankara (2024)

ANKARA	
Number of Fairs Held	31
Total Number of Fair Participants	8,810
Number of Foreign Country Participants	301
Number of Direct Foreign Participants	703
Number of Indirect Foreign Participants	210
Total Number of Visitors	1,547,165
Number of Foreign Visitors	17,874
Total Booth Area Allocated to Participants (Net / m^2)	134,903
Total Booth Area Allocated to Direct Foreign Participants (Net / m^2)	9,728
Total Booth Area Allocated to Indirect Foreign Participants (Net / m^2)	18,552

Source: TOBB, 2024.

In addition to corporate representation, another factor that increases the visibility of Ankara's trade on a national and international scale is trade fair organizations. Ankara is one of Turkey's most important fair centers, hosting over 300 fairs annually. Considering both the number of participants and visitors, fairs provide local producers with opportunities to access international markets; the presence of foreign participants also increases Ankara's visibility in the global trade network.

Table 42: Income Taxpayers by Year

Year	Turkey	Ankara	Ankara's Share (%)
2018	1,920,586	136,089	7.08
2019	1,964,548	138,523	7.05
2020	2,086,100	147,095	7.05
2021	2,235,576	160,048	7.2
2022	2,364,625	169,299	7.16
2023	2,478,136	179,563	7.25
2024	2,606,489	188,080	7.21
2025*	2,687,808	193,148	7.2

*As of July
Source: GİB, 2025.

The number of income tax payers across Turkey showed steady growth between 2018 and 2025, with the total number of taxpayers rising from 1.92 million to 2.68 million. This increase represents approximately 40% growth. In Ankara, the number of taxpayers rose from 136,000 to 193,000 during the same period. Ankara's share of the national total has remained stable at around 7% over the years, reaching its highest level of 7.25% in 2023 and 7.20% in 2025.

These figures show that Ankara has a stable and strong position in the distribution of income tax taxpayers across the country. The fact that the growth rates are in line with the Turkish average shows

that the city's economic growth and developments in the registered taxpayer base are consistent with national trends. The acceleration in the increase in taxpayers in Ankara, especially after 2020, reflects the expansion of the service and trade sectors in the city, as well as the impact of entrepreneurial activities and employment growth.

Table 43: Corporate Taxpayers by Year

Year	Turkey	Ankara	Ankara's Share (%)
2018	806,622	88,146	10.92
2019	848,904	91,572	10.78
2020	918,229	97,241	10.59
2021	986,318	102,586	10.4
2022	1,069,339	108,793	10.17
2023	1,143,344	115,714	10.12
2024	1,188,686	120,653	10.15
2025*	1,216,519	123,993	10.19

*As of July
Source: GİB, 2025.

The number of corporate tax payers in Turkey has shown a steady increase between 2018 and 2025, rising from a total of 806,000 to over 1.21 million. During the same period, the number of active corporate tax payers in Ankara rose from 88,000 to 124,000. Ankara's share of the Turkish total has remained in the 10–11% range over the years, falling from 10.92% in 2018 to 10.19% in 2025. The findings show that although the number of taxpayers in Ankara has increased in absolute terms, the rate of increase is relatively higher across Turkey as a whole.

Ankara taxpayers account for approximately one-tenth of the country's total corporate tax revenue. While the data reflects the capital's strong position in terms of its level of incorporation and volume of economic activity, the faster rate of increase across Turkey in recent years has led to a slight decline in Ankara's relative share.

Table 44: Number and Value of Checks Processed in Ankara (in Thousand TL)

Checks Processed Without Coverage				
Year	Number of Checks	Number of Checks (Share %)	Check Amount (TL)	Check Amount (TL, Share %)
	Turkey	Ankara	Turkey	Ankara
2021	152,494	9,878 (6.5%)	13,823,888,000	1,004,338,000 (7.3%)
2022	123,519	10,613 (8.6%)	20,609,693,000	2,414,107,000 (11.7%)
2023	146,832	12,217 (8.3%)	57,061,802,000	5,437,886,000 (9.5%)
2024	272,990	20,686 (7.6%)	23,380,788,118	2,014,183,584 (8.6%)
2025*	138,408	10,549 (7.6%)	106,997,307,400	10,065,311,430 (9.4%)
Checks Paid Upon Presentation				
Year	Number of Checks	Number of Checks (Share %)	Check Amount (TL)	Check Amount (TL, Share %)
	Turkey	Ankara	Turkey	Ankara
2021	15,005,387	1,153,533 (7.7%)	1,365,161,730,000	136,905,336,000 (10.0%)

2022	16,760,468	1,305,783 (7.8%)	2,631,479,837,000	251,400,470,000 (9.6%)
2023	16,807,737	1,386,035 (8.2%)	4,509,830,122,000	475,792,062,000 (10.6%)
2024	16,892,874	1,412,199 (8.4%)	981,317,629,956	122,303,928,661 (12.5%)
2025*	7,565,399	652,790 (8.6%)	4,538,146,620,000	534,451,921,000 (11.8%)

*As of June
Source: ATO, 2025.

Ankara accounts for approximately one-tenth of the country's total corporate tax payers, demonstrating its strong position in terms of the level of incorporation and volume of economic activity. Looking at check transactions, while the number of dishonored checks fluctuated across Turkey during the 2021–2025 period, Ankara's share remained stable at around 7–8%. However, Ankara's share of dishonored check amounts rose from 7.3% to 9.4%; this increase indicates that the city hosts higher-value commercial transactions. Ankara's position is even stronger in terms of checks paid upon presentation: its share in terms of value rose from 10% to over 12%, confirming the capital's status as a reliable center for high-volume commercial transactions.

Table 45: Protested Bills and Their Values in Ankara (Bills over 2,000 TL) (in Thousand TL)

Year	Turkey – Number of Bills	Ankara – Number of Bills (Share %)	Turkey – Bill Amount (TL)	Ankara – Bill Amount (TL, Share %)
2021	421,033	34,996 (8.3%)	11,889,742,000	1,251,982,000 (10.5%)
2022	291,995	24,856 (8.5%)	12,065,349,000	1,993,945,000 (16.5%)
2023	218,760	17,649 (8.1%)	19,221,249,000	1,374,962,000 (7.2%)
2024	241,964	19,792 (8.2%)	5,673,805,041,000	824,475,371,000 (14.5%)
2025*	138,187	11,670 (8.4%)	39,724,011,500,000	3,048,670,110,000 (7.7%)

*As of July
Source: ATO, 2025.

A similar trend is observed in protested bills. While the number of protested bills decreased across Turkey, Ankara's share remained stable at around 8%, indicating that the city showed a balanced performance in line with the national average. Although there are seasonal fluctuations in terms of value, the increase in Ankara's rates in some years shows that the transactions subject to protest in the city are mostly related to large-scale commercial activities. Ankara has a stable and strong share in terms of financial transactions and maintains its position as one of the leading centers of the country's economy in large-scale commercial activities.

Table 46: Companies Established and Closed in Ankara

Turkey				
Year	Companies Established	Companies Closed	Established Individual Commercial Enterprises	Individual Commercial Enterprise Closed
2022	126,950	19,412	23,622	19,968
2023	128,528	25,883	19,880	32,933
2024	115,463	25,883	16,216	32,933
2025*	53,214	14,092	8,261	7,997

Ankara				
Year	**Companies Established**	**Closed Companies**	**Established Sole Proprietorship**	**Closed Sole Proprietorship**
2022	12,695	2,210	993	1,598
2023	12,738	2,361	992	3,754
2024	12,118	2,783	864	1,511
2025*	5,700	1,209	497	580

*As of June
Source: ATO, 2025.

The number of companies established across Turkey was 126,900 in 2022, rising to 128,500 in 2023, but falling to 115,400 in 2024. In the first seven months of 2025, the number of companies established was recorded as 53,200, while the number of companies that closed during the same period was 14,000. In sole proprietorships, closures were higher than establishments, and this difference became particularly pronounced in 2023 and 2024.

A similar trend is observed in Ankara. In 2022, 12,700 companies were established, this number remained flat in 2023, and in 2024, it decreased slightly to 12,100. In the first seven months of 2025, 5,700 companies were established. Company closures have shown an upward trend over the years, with 2,783 closures in 2024. In Ankara, a high rate of closures was also observed in sole proprietorships, reaching a figure well above the number of establishments, particularly in 2023 with 3,754 closures.

Data for 2025 shows that business openings in Ankara are concentrated mainly in the trade and service sectors. The sectors with the most business openings in Ankara are as follows:

- Wholesale and Retail Trade (1,613)
- Construction (1,061)
- Manufacturing (729)
- Administrative and Support Service Activities (643)
- Accommodation and Food Service Activities (475)

This distribution shows that entrepreneurship and business start-ups in Ankara are particularly focused on trade and services. When the current situation is assessed, the number of companies established in Ankara follows a stable course, while an upward trend in closures is noteworthy. The fact that closures among sole proprietorships are higher than among corporations reveals that small-scale enterprises are more fragile in terms of sustainability.

Table 47: Gross Domestic Product in Ankara (Current Prices)

	2021		2022		2023	
	GDP Share (%)	**GDP Amount**	**GDP Share (%)**	**GDP Amount**	**GDP Share (%)**	**GDP Amount**
Turkey	100	7,256,141,737	100%	15,011,775,979	100%	26,545,721,797
Ankara	9.3%	670,458,843	8.9%	1,329,809,540	9.6%	2,538,686,407

Source: TÜİK, 2023.

According to the data in the table, Turkey's GDP rose from 7.26 trillion TL in 2021 to 26.5 trillion TL in 2023. During the same period, Ankara's GDP rose from 670 billion TL to 2.53 trillion TL, and its share in the country's total GDP increased from 9.3% to 9.6%. The data shows that Ankara's economic growth exceeded the Turkish average and that the city's weight in the national economy is increasing. In

particular, the 9.6% share achieved in 2023 demonstrates that Ankara, together with its industry, trade, and service sectors, made a strong contribution to national economic growth.

Table 48: GDP per Capita in Ankara (Current Prices)

	2021		2022		2023	
	TL	Dollar ($)	TL	Dollar ($)	TL	Dollar ($)
Turkey	86,231 TL	9,601 $	176,651 TL	10,659 $	311,110 TL	13,243 $
Ankara	117,515 TL	13,084 $	230,677 TL	13,919 $	438,242 TL	18,655 $

Source: TÜİK, 2023.

Ankara's per capita Gross Domestic Product (GDP) data reveals that the province has demonstrated an economic performance significantly above the Turkish average. In 2021, GDP per capita was 117,515 TL (13,084 USD), while in 2023 it reached 438,242 TL (18,655 USD). During the same period, the Turkish average rose from 86,231 TL to 311,110 TL, and in dollar terms, from 9,601 USD to 13,243 USD. This comparison shows that Ankara's per capita income is approximately 40% above the Turkish average. This situation reflects the weight of high value-added sectors and a strong services infrastructure in the city's economic structure, making Ankara one of the leading centers in terms of prosperity on a national scale.

Table 49: GDP Distribution by Sector (Billion ₺ and Percentage Share)

Sector	Amount (Billions TL)	Share (%)
Agriculture, Forestry, and Fishing	44.4	1.8
Mining, Quarrying, and Other Industries	504	19.9
- Manufacturing Industry	412	16.2
Construction	150	5.9
Information and Communication	118	4.7
Wholesale and Retail Trade, Transportation and Storage, Accommodation and Food Service Activities	525.8	20.7
Financial and Insurance Activities	63	2.5
Real Estate Activities	81	3.2
Professional, Scientific, Technical, Administrative, and Support Services Activities	145	5.7
Public Administration and Defense, Education, Human Health, and Social Services Activities	349	13.8
Other Services	269	10.6
Taxes and Subsidies	287.7	11.3
Total	2,536.90	100

Source: ATO, 2024.

When examining the sectoral distribution of Ankara's economy, it is seen that the highest share belongs to the wholesale and retail trade, transportation, storage, and accommodation-food services group. This sector accounts for 20.7% of the total with a volume of 525.8 billion TL. This sector reinforces Ankara's status as a center for both domestic trade and logistics and services.

In second place, mining and quarrying and manufacturing together account for a 19.9% share. In particular, the 16.2% share of manufacturing highlights Ankara's strong industrial production capacity.

Public administration, defense, education, and health services, with a 13.8% share, reflect the city's status as the capital.

Service sectors have a significant weight in Ankara's economy. Information and communication (4.7%), professional and technical services (5.7%), and real estate activities (3.2%) offer a remarkable diversity. The construction sector, with a 5.9% share, reflects urban growth and infrastructure investments, while finance and insurance have a more limited share of 2.5%. On the other hand, the tax and subsidies item indicates a significant size at 11.3%. The findings show the role of fiscal transfers and public resources in the city's economy due to Ankara's central government functions.

Although Ankara's economy is trade and service-oriented, it also maintains a strong dual structure based on manufacturing and public administration. This diversity increases the city's economic resilience and makes Ankara a multi-layered economic center focused on both production and services.

Table 50: Top 10 Provinces with the Highest Exports

	2022			2023			2024			2025		
	Province	Exports (Billion $)	Percentage of Total Exports	Province	Exports (Billion $)	Percentage of Total Exports	Province	Exports (Billion $)	Percentage of Total Exports	Province	Exports (Billion $)	Percentage of Total Exports
1	Istanbul	124.6	49.04	Istanbul	127.2	49.77	Istanbul	125.9	48.09	Istanbul	9.8	47.71
2	Izmir	17	6.69	Izmir	17.2	6.73	Izmir	16.9	6.46	**Ankara**	**1.35**	**6.57**
3	Kocaeli	14.4	5.67	Kocaeli	13.1	5.13	**Ankara**	**14.9**	**5.69**	Izmir	1.33	6.48
4	Bursa	12.8	5.04	**Ankara**	**12.8**	**5.01**	Kocaeli	13.2	5.04	Kocaeli	1.15	5.6
5	**Ankara**	**12**	**4.72**	Bursa	12.7	4.97	Bursa	12.4	4.73	Bursa	1	4.87
6	Gaziantep	11.2	4.41	Gaziantep	10.5	4.11	Gaziantep	10.3	3.93	Mersin	0.75	3.65
7	Mersin	6.2	2.47	Mersin	7.8	3.07	Mersin	9.3	3.54	Gaziantep	0.73	3.55
8	Sakarya	5.3	2.09	Sakarya	6.1	2.39	Sakarya	6.6	2.52	Sakarya	0.51	2.48
9	Denizli	4.3	1.68	Denizli	4.3	1.68	Denizli	4.4	1.68	Denizli	0.34	1.68
10	Hatay	4.1	1.61	Kayseri	3.6	1.41	Hatay	3.8	1.45	Hatay	0.28	1.36
	Other	**42.1**	**16.57**	**Other**	**40.5**	**15.85**	**Other**	**45.1**	**17.23**	**Other**	**3.3**	**16.07**
	Total	**254.1**	**100**	**Total**	**255.6**	**100**	**Total**	**261.8**	**100**	**Total**	**20.5**	**100**

*As of June
Source: TÜİK, 2025.

Exports across Turkey showed an upward trend during the 2022–2024 period, with the total export value rising from $254.1 billion to $261.8 billion. In the first period of 2025 (January), total exports amounted to $20.5 billion. During this period, Istanbul maintained its clear leadership position, accounting for approximately half of exports each year, while Ankara performed steadily in the middle to upper ranks of exports.

Ankara, which accounted for 4.7% of the total with $12 billion in exports in 2022, reached $12.8 billion (5.0%) in 2023 and $14.9 billion (5.7%) in 2024. This increase shows that Ankara's export volume has grown steadily. According to provisional data for June 2025, Ankara has risen to become Turkey's second-largest exporting province with $1.35 billion in exports and a 6.6% share. Overtaking traditional export centers such as Izmir and Kocaeli indicates a significant momentum in Ankara's export potential.

The rise in Ankara's export performance is linked to developments in the province's industrial production, particularly in high value-added sectors such as defense and aerospace, machinery and equipment, chemicals, and pharmaceuticals. In addition, the diversification of logistics capabilities and the increase in the number of exporting companies are strengthening Ankara's export capacity.

Table 51: Top 10 Provinces with the Highest Imports

	2022			2023			2024			2025		
	Province	Imports (Billion $)	Percentage of Total Imports	Province	Imports (Billion $)	Percentage of Total Imports	Province	Imports (Billion $)	Percentage of Total Imports	Province	Imports (Billion $)	Percentage of Total Imports
1	Istanbul	178.5	49.08	Istanbul	203.4	56.2	Istanbul	194.3	56.48	Istanbul	16.7	58.39
2	Kocaeli	18.4	5.06	Kocaeli	18.1	5.01	**Ankara**	**17.2**	**5**	**Ankara**	**1.25**	**4.37**
3	**Ankara**	**14.4**	**3.96**	**Ankara**	**17.2**	**4.75**	Kocaeli	16.3	4.74	Kocaeli	1.23	4.3
4	Izmir	13.5	3.71	Izmir	12.9	3.56	Izmir	12.5	3.63	Izmir	1	3.5
5	Bursa	8.2	2.25	Bursa	10.6	2.93	Bursa	9	2.61	Bursa	0.9	3.15
6	Gaziantep	8.5	2.34	Mersin	7.9	2.18	Mersin	8.1	2.35	Mersin	0.72	2.52
7	Hatay	7.7	2.12	Gaziantep	7.1	1.96	Gaziantep	6.8	1.98	Gaziantep	0.63	2.2
8	Mersin	6.9	1.9	Hatay	5.3	1.46	Hatay	6.6	1.92	Hatay	0.43	1.5
9	Adana	4.9	1.34	Adana	4.2	1.17	Sakarya	4.3	1.24	Manisa	0.38	1.33
10	Çorum	3.9	1.07	Çorum	4	1.1	Manisa	3.6	1.05	Adana	0.38	1.33
	Other	**96.8**	**26.62**	**Other**	**71.2**	**19.72**	**Other**	**64.7**	**18.81**	**Other**	**4.98**	**17.41**
	Total	**363.7**	**100**	**Total**	**361.9**	**100**	**Total**	**344**	**100**	**Total**	**28.6**	**100**

*As of June
Source: TÜİK, 2025.

Imports across Turkey declined from $363.7 billion to $344 billion between 2022 and 2024, reaching $28.6 billion in the first month of 2025. Istanbul continues to be the absolute leader, accounting for more than half of total imports each year.

Ankara's imports, which were $14.4 billion (3.96%) in 2022, rose to $17.2 billion in 2023 and 2024, increasing its share of total imports to 5%. According to June 2025 data, Ankara ranks second after Istanbul with $1.25 billion in imports and a 4.37% share, surpassing Kocaeli.

It is estimated that Ankara's imports are concentrated on intermediate goods and capital goods that support industrial production. In particular, the capacity in the defense, technology, and manufacturing sectors fuels Ankara's high-volume import demand. This situation shows that the city's imports are more production-oriented than consumption-oriented.

When Ankara's import performance is evaluated alongside its exports, it is seen that the city's foreign trade structure is based on high value-added production and technology-intensive sectors. This position confirms that Ankara has become not only a public and service center in Turkey's economic structure, but also a strong production and foreign trade hub.

Table 52: Top Export Products of Ankara

2024			2025		
Rank	**Sector**	**Exports (Billion $)**	**Rank**	**Sector**	**Exports (Millions $)**
1	Machinery and equipment	1.9	**1**	Weapons and ammunition, their parts, components, and accessories	229.3
2	Electronic devices	1.6	**2**	Motor vehicles and parts	180.4
3	Weapons and ammunition, their components, parts, and accessories	1.6	**3**	Electronic devices	171.2
4	Motor vehicles and parts	1.4	**4**	Machinery and equipment	129.2
5	Iron or steel goods	1.2	**5**	Iron or steel goods	87.3
6	Inorganic chemicals	1.1	**6**	Inorganic chemicals	78.5
7	Aircraft, spacecraft, and parts	0.81	**7**	Metal ores, slag, and ash	74.9
8	Metal ores, slag, and ash	0.72	**8**	Aircraft, spacecraft, and parts	53.2
9	Mineral fuels, oils, and waxes	0.38	**9**	Salt, sulfur, earths and stones, plasters, lime and cement	35.0
10	Optical, photographic, cinematographic, measuring, checking, medical, and surgical instruments and apparatus	0.38	**10**	Optical, photographic, cinematographic, measuring, checking, adjusting, medical, and surgical instruments and apparatus	27.5
—	Other sectors	3.8	**—**	Other sectors	248.9
	Total	**14.9**		**Total**	**1,303.0**

*As of June
Source: TÜİK, 2025.

Data for 2024 shows that Ankara's exports are dominated by the machinery and equipment (USD 1.9 billion), electronic devices (USD 1.6 billion), arms and ammunition (USD 1.6 billion), and motor vehicles (USD 1.4 billion) sectors. This table reveals that the capital's industrial profile is predominantly based on high value-added, technology and industry-focused products. While the defense industry, machinery, electronics, and automotive sectors are the driving forces of exports, areas such as iron and steel products, chemicals, and optical and medical devices play a complementary role in the city's export portfolio.

A similar trend was maintained in the first half of 2025. Defense industry products (USD 229.3 million), motor vehicles (USD 180.4 million), electronic devices (USD 171.2 million), and machinery (USD 129.2 million) constituted the bulk of exports. This distribution shows that defense and aviation, along with technology-intensive sectors, have strengthened their decisive position in Ankara's export structure. In particular, the prominence of arms and ammunition reflects Ankara's growing effectiveness in international markets in the defense industry. Thus, Ankara has reinforced its image as an export center specializing in advanced technology and strategic products rather than labor-intensive sectors.

Table 53: Top Import Products of Ankara

2024			2025		
Rank	**Sector**	**Imports (Billion $)**	**Rank**	**Sector**	**Imports (Millions $)**
1	Machinery and equipment	3.7	**1**	Machinery and equipment	259.3
2	Electronic devices	2.4	**2**	Electronic devices	242.3
3	Precious stones, metals, pearls, and coins	1.5	**3**	Optical, photographic, cinematographic, measuring, checking, adjusting, medical, and surgical instruments	92.5
4	Optical, photographic, cinematographic, measuring, checking, regulating, medical, surgical instruments and apparatus	1.1	**4**	Motor vehicles and parts	69.3
5	Motor vehicles and parts	0.91	**5**	Aircraft, spacecraft, and their parts and components	58.1
6	Pharmaceutical products	0.77	**6**	Pharmaceutical products	52.9
7	Mineral fuels, oils, and waxes	0.70	**7**	Iron or steel goods	46.7
8	Iron or steel goods	0.60	**8**	Precious stones, metals, pearls, and metal coins	45.9
9	Meat and edible offal	0.50	**9**	Meat and edible offal	39.1
10	Aluminum and aluminum items	0.49	**10**	Aluminum and aluminum products	37.2
—	Other sectors	4.6	**—**	Other sectors	314.4
	Total	**17.2**		**Total**	**1,200.0**

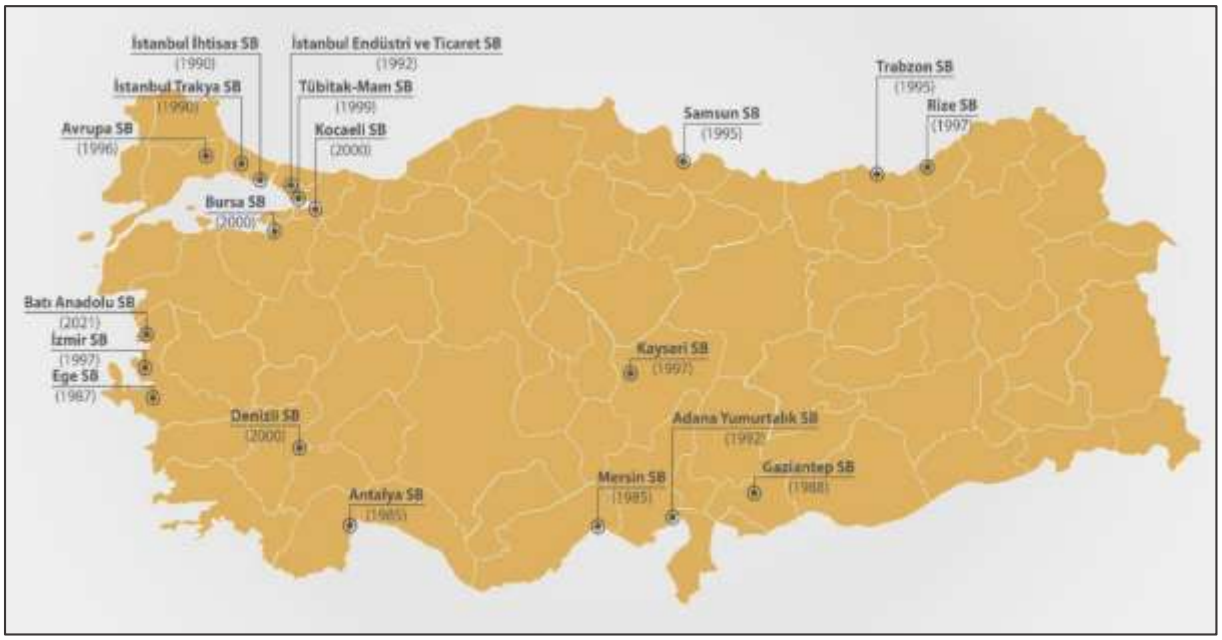
*As of June
Source: TÜİK, 2025.

An analysis of Ankara's import structure reveals that machinery and equipment (USD 3.7 billion), electronic devices (USD 2.4 billion), precious stones and metals (USD 1.5 billion), and optical and medical devices (USD 1.1 billion) were the most prominent items in 2024. This table shows that Ankara is heavily dependent on high-tech intermediate goods and capital goods from abroad to support its industrial production. Motor vehicles, pharmaceutical products, and mineral fuels also occupy an important place in the import basket, while meat products and aluminum imports, which are agricultural inputs, are among the complementary items.

A similar picture continued in the first half of 2025. Machinery and parts (USD 259.3 million) and electronic devices (USD 242.3 million) remained the main items of Ankara's imports, while optical and medical devices (USD 92.5 million), motor vehicles (USD 69.3 million), and aircraft (USD 58.1 million) stood out as important sub-sectors. Pharmaceutical products, iron and steel goods, and precious stones also hold a certain weight. This distribution reveals that Ankara's imports are largely based on high technology, industrial inputs, and strategic products, confirming that imports function as a tool that feeds the city's production capacity in its economic structure.

Differences in Turkey's foreign trade performance are also directly related to the special production and trade opportunities provided by free zones. The free zone map below reveals the spatial distribution and regional focus of Turkey's foreign trade infrastructure.

Figure 27: Map of Türkiye's Free Zones



Source: Ministry of Trade, 2025.

Free zones are concentrated in Turkey's foreign trade infrastructure, particularly in port cities and logistics centers. Free zones operating in provinces such as Istanbul, Izmir, Mersin, Kocaeli, and Gaziantep are focal points for export-oriented production and investment. Although there is no direct free zone in Ankara, the city's foreign trade structure is shaped through strong links with these zones.

Ankara's leading export products, including defense, aviation, machinery, and pharmaceuticals, are exported to international markets through free zones in port cities. The free zones in Mersin, Izmir, and Istanbul, in particular, serve as critical transit points for the foreign trade operations of Ankara-based manufacturing companies. On the other hand, Ankara has a strategic advantage to strengthen its cooperation with free zones thanks to its high value-added and technology-intensive production capacity. Products manufactured in Ankara in the defense industry, information technology, and advanced manufacturing sectors can access a broader global market through free zones. In this context, Ankara's role in foreign trade is evaluated not only by its direct export performance but also by the integration and cooperation mechanisms it has established with free zones. Another factor that increases the effectiveness of this integration is the customs structure in the region.

Table 54: Customs Administrations

Serial No	Central Anatolia Customs and Foreign Trade Regional Directorate (Ankara)	Province	Class
1	Ankara Customs Directorate	Ankara	A
2	Esenboğa Customs Directorate	Ankara	A
3	Konya Customs Directorate	Konya	A
4	Karaman Customs Directorate	Karaman	A
5	Kayseri Customs Directorate	Kayseri	A
6	Aksaray Customs Directorate	Aksaray	A
7	Kırşehir Customs Directorate	Kırşehir	A
8	Ankara Station Customs Directorate	Ankara	B
9	Nevşehir Customs Directorate	Nevşehir	B
10	Niğde Customs Directorate	Niğde	A
11	Kayseri Free Zone Customs Directorate	Kayseri	A

12	Konya Ereğli Customs Directorate	Konya	A

Source: Ministry of Trade, 2024.

There are a total of 12 customs directorates affiliated with the Central Anatolia Customs and Foreign Trade Regional Directorate, three of which are located in Ankara. The Ankara and Esenboğa Customs Directorates provide Class A services, while the Ankara Gar Customs Directorate provides Class B services; thus, the capital has a multifaceted capacity in foreign trade processes connected by land, air, and rail.

This network, which also includes the directorates in Konya, Kayseri, Karaman, Aksaray, Kırşehir, Niğde, and Nevşehir, demonstrates that Central Anatolia has a diversified and scaled structure in foreign trade. Combined with Ankara's central location and high value-added production capacity, this structure provides a strategic advantage for the province's access to international markets.

Another critical element that completes the customs structure is the logistics infrastructure. Ankara is located at the intersection of road, air, and rail networks, placing it at the center of Turkey's logistics corridors. Esenboğa Airport is one of Turkey's busiest airports in terms of passenger traffic and will achieve higher capacity in both passenger and cargo transportation thanks to the expansion project planned for 2027. The city also has a strong military aviation infrastructure. The 11th Air Transport Main Base in Etimesgut and Mürted Airfield in Kahramankazan are of strategic importance; their location next to the TUSAŞ facilities creates a strong synergy between the defense industry and logistics.

Ankara's railway infrastructure, together with high-speed train lines, serves as Turkey's core transportation network. The process that began with the Ankara–Eskişehir line has expanded with the Ankara–Istanbul and Ankara–Sivas lines; furthermore, integration along the western and northern axes has been strengthened with projects such as the Afyon section of the Izmir–Ankara line and the Sincan–Yenikent–Kazan-Soda connection. Similarly, highway investments reinforce the city's role in the national logistics network. The Ankara–Niğde Highway, equipped with smart transportation systems, increases the existing capacity; the Ankara–Kırıkkale–Delice and Ankara–Sivrihisar highways are planned to be completed by 2029, and the Ankara–İzmir Highway by 2035.

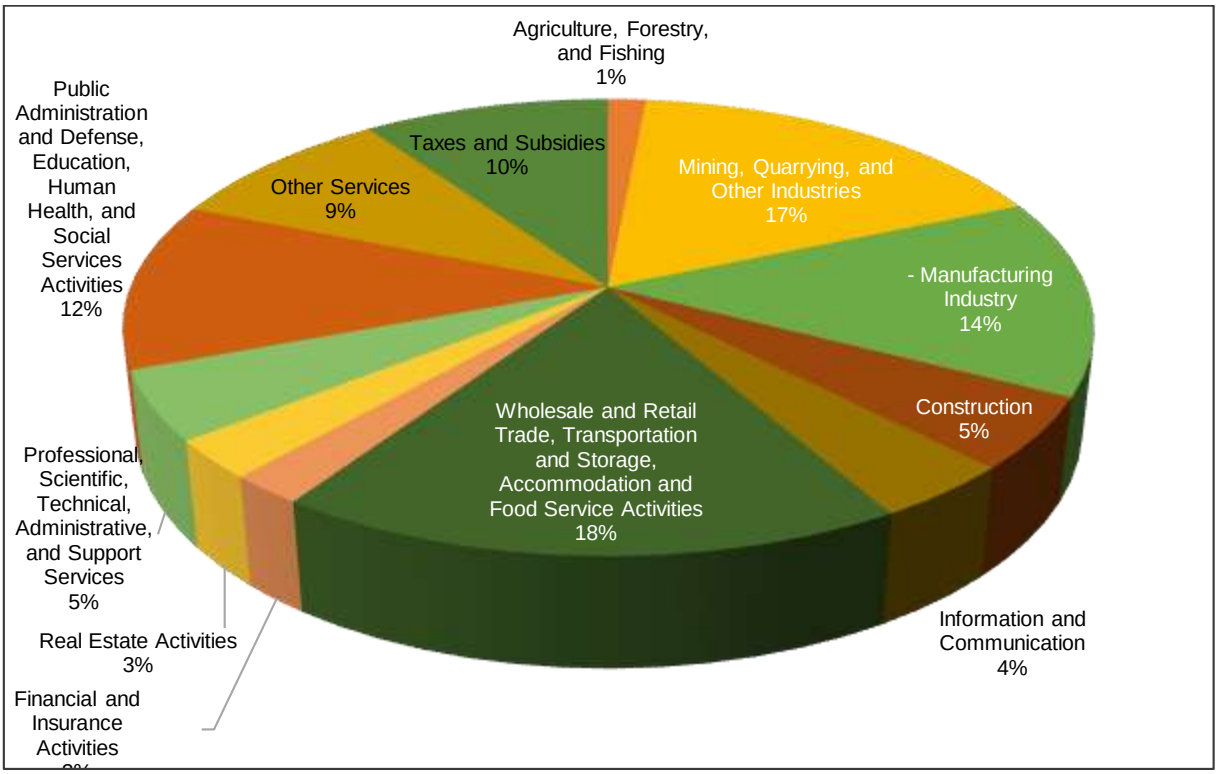
Considering Ankara's logistics capacity, consisting of road-rail-air integration, its high value-added production structure, and its increasing export potential, the establishment of a free zone structure that will advance the city's international competitiveness is a strategic necessity. Analyses show that the lack of free zone infrastructure creates certain limitations in export processes; in particular, it increases the need for cost and time optimization in accessing foreign markets, especially in the high-tech, defense, aviation, biotechnology, and electronics sectors. The free zone pre-feasibility studies conducted by the Ankara Development Agency reveal that the Temelli region is considered a suitable alternative for a free zone in terms of accessibility, land integrity, logistics connectivity, and proximity to industrial clusters. Temelli's location enables the development of a logistics-economic ecosystem that can work in integration with OIZ structures, allowing Ankara's export share to strengthen in the medium term. The establishment of a free zone will accelerate the reflection of specialization in high-tech production on foreign trade performance; it will make the province's position in national exports more visible by supporting integration into global value chains.

All these investments enable Ankara to increase its effectiveness not only in domestic markets but also in foreign trade through free zones. The city's logistics infrastructure connects its high value-added production and industrial capacity to international markets, creating efficiency in production, trade, and export processes. Thus, Ankara goes beyond being a logistics hub connecting continents, regions, and cities; it strengthens its strategic position in the national economy thanks to its foreign trade structure integrated with free zones.

2.6. Sectoral Outlook

Ankara's economy has a multidimensional structure focused on services and industry. The city is one of Turkey's leading economic centers, both due to its capacity in public administration and services and its high value-added industrial production. Technology-intensive sectors such as machinery, defense, electronics, and chemicals define the capital's production profile, while services such as trade, transportation, education, and health reinforce the city's functionality at the national and regional levels. This section examines Ankara's sectoral outlook, production and trade structure, business scales, and export-import distribution.

Figure 28: Sectoral Distribution of Gross Domestic Product in Ankara (%)



Source: ATO, 2024.

Ankara's sectoral outlook reveals that services and industry are jointly decisive in the city's economic structure. Wholesale and retail trade, transportation, and accommodation activities account for the highest share of total GDP at 18%. This ratio confirms that Ankara is not only an administrative center but also a strong trade and service center. In the industrial sector, mining and quarrying (17%) and manufacturing (14%) stand out, forming the backbone of the city's production capacity.

As an economic reflection of its capital city identity, public administration, defense, education, and health services are the third largest sector with a 12% share. On the other hand, construction (5%), information and communication (4%), professional and technical services (5%), and real estate activities (3%) are areas that add diversity to the economy. Taxes and subsidies (10%) and other services (9%) have also reached significant levels. This distribution shows that Ankara's sectoral outlook is characterized by a multi-layered economic structure supported by both high value-added production and a developed service infrastructure.

Table 55: Distribution of Number of Enterprises by Sector in Ankara

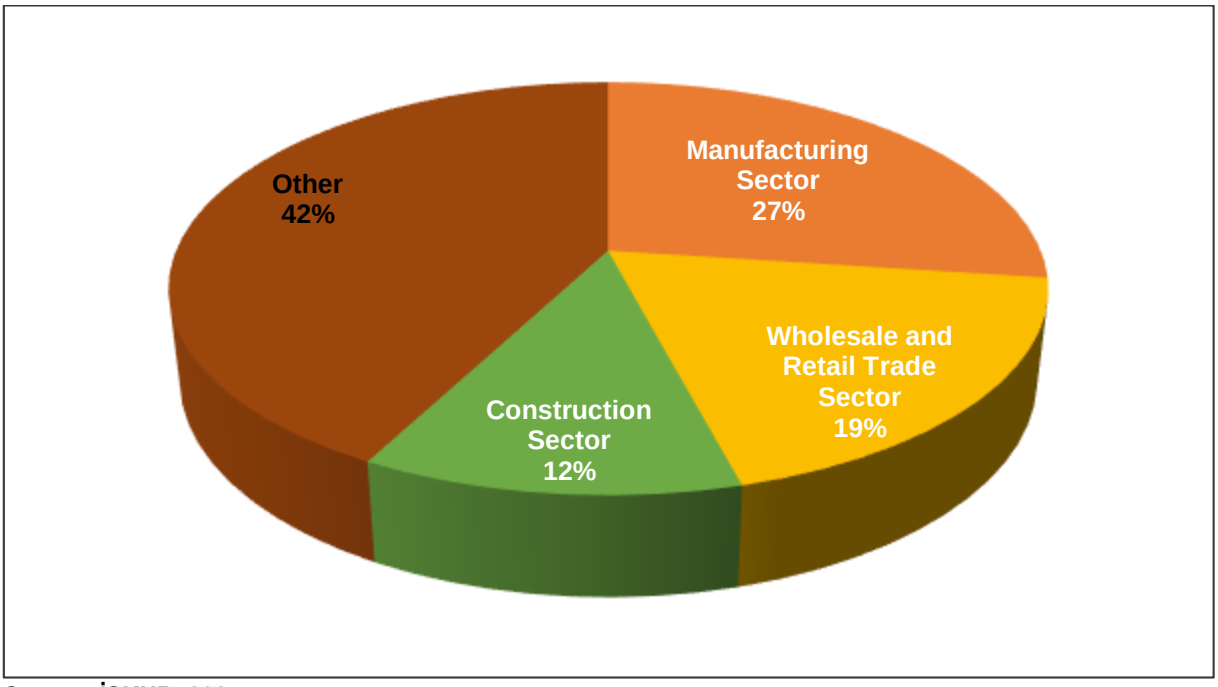
Sector Name	Number of Businesses	
	Ankara	Turkey
Electrical and Electronics Industry	437	3,336
Pharmaceutical and Medical Device Industry	43	584
Chemical Industry	744	10,644
Primary Metal Industry	886	4,349
Automotive Industry	474	2,976
Agricultural Products Industry	497	9,015
Textiles, Ready-to-Wear, and Leather Industry	226	12,017
Machinery Industry	1,649	16,578

Source: Ministry of Industry and Technology Guild Data, 2025.

When viewed in terms of industrial enterprises, Ankara's production structure is particularly concentrated in the machinery industry (1,649 enterprises), primary metal industry (886 enterprises), and chemical industry (744 enterprises). These three areas form the backbone of the city's manufacturing industry and support its high value-added production capacity. The electrical-electronics (437 enterprises) and automotive industries (474 enterprises) also reflect Ankara's potential in technology-intensive sectors.

In contrast, the textile, ready-to-wear, and leather industry (226 businesses) and the pharmaceutical and medical device industry (43 businesses) remain relatively low in density in Ankara compared to the Turkish average. The soil products industry (497 businesses) is a limited but complementary area that demonstrates the integration of regional agricultural production into industry. This distribution reveals that Ankara's industrial profile is focused on technology, machinery, metal, and chemistry rather than labor-intensive sectors; therefore, the province's production structure shows a growing trend toward specialization in high value-added sectors.

Figure 29: Sectoral Distribution of Workplaces in Ankara



Source: İŞKUR, 2024.

The sectoral distribution of workplaces in Ankara shows that industry, trade, and services are jointly decisive in the city's economic structure. Twenty-seven percent of workplaces operate in the manufacturing sector, 19% in wholesale and retail trade, and 12% in construction. The remaining 42% in the "other" category consists of information and communication, health, education, finance, professional services, and various service activities, reflecting the economic diversity of the capital.

The data reveals that, alongside the strong position of manufacturing and trade in Ankara's sectoral outlook, the wide range of services plays a complementary role in supporting the economy. The distribution of workplaces in the city makes Ankara both a center with high production and trade capacity and an economic hub that stands out with its multifaceted service infrastructure.

Table 56: Sectoral Distribution of Ankara's Exports (2024)

ISIC Code	Sector Name	Exports (USD)	Share
A	Agriculture and Forestry	204,426,533	1.41
B	Fisheries	5.925	0.00%
C	Mining and Quarrying	1,376,570,727	9.48%
D	Manufacturing Industry	12,869,685,202	88.66%
E	Electricity, Gas, and Water	16,019,316	0.11
G	Wholesale and Retail Trade	47,795,095	0.33%
K	Real Estate, Leasing, and Business Activities	1,151,423	0.01%
O	Other Social, Community, and Personal Services	732,478	0.01
	Total	14,516,386,699	

Source: TÜİK, 2024.

The 2024 export data reveals that the manufacturing industry plays an absolutely decisive role in Ankara's foreign trade structure. Manufacturing accounts for 88.7% of total exports, indicating that the capital's export profile is largely industry-based. In particular, defense, machinery, electronics, and chemical-focused production form the core sub-sectors that fuel Ankara's high value-added export capacity.

Following manufacturing, mining and quarrying account for 9.5%, and agriculture and forestry for 1.4%. Wholesale and retail trade (0.3%), electricity-gas-water (0.1%), and other service activities remain quite limited in total exports. The resulting distribution reveals that Ankara's exports are dominated by an industry-based, technology-intensive, and production-centered structure, with agriculture and services playing a complementary role.

Table 57: Sectoral Distribution of Ankara's Imports (2024)

ISIC Code	Sector Name	Imports (USD)	Share
A	Agriculture and Forestry	414,733,671	2.35
B	Fisheries	123,483	0.00
C	Mining and Quarrying	398,740,723	2.26
D	Manufacturing Industry	16,532,676,098	93.85%
E	Electricity, Gas, and Water	58,822,960	0.33
G	Wholesale and Retail Trade	197,115,878	1.12%
K	Real Estate, Rental, and Business Activities	1,002,634	0.01%
O	Other Social, Community, and Personal Services	13,086,005	0.07%
	Total	**17,616,301,452**	

Source: TÜİK, 2024.

The 2024 data shows that manufacturing industry accounts for 93.9% of Ankara's imports, giving it absolute dominance. This ratio reveals that the city's imports are largely based on intermediate goods and capital goods used in production processes, meaning that imports essentially serve as a means of fueling Ankara's industrial capacity.

Sectors other than manufacturing have relatively limited shares. Agriculture and forestry contribute 2.4%, mining and quarrying 2.3%, wholesale and retail trade 1.1%, while electricity, gas, water, real estate, and other social services account for less than 1% of the total. This distribution confirms that Ankara's imports are dominated by a structure dependent on technology-intensive, high value-added production inputs, while consumer goods and low value-added items remain quite limited.

Ankara's sectoral structure presents a multi-layered economic profile shaped by high value-added manufacturing industry and diversified services sector. Advanced technology-focused areas such as defense, machinery, electronics, and chemicals increase the province's competitiveness, while trade and services provide strong support in terms of business premises and employment. However, the limited share of agriculture and the high dependence on imports in industrial production stand out as elements that need to be carefully managed in the city's economic structure.

Ankara's sectoral outlook reveals a multi-layered structure shaped by both services and industry within this general framework. However, certain leading sectors stand out even more in terms of the province's investment and promotion strategy. These sectors are: information technology, defense and aerospace, pharmaceuticals, medical devices, and health technologies, furniture, and industrial and construction machinery. Below, each of these areas is evaluated in terms of their current status and future potential within Ankara's economic structure.

Information Technology Sector

Ankara possesses one of Turkey's most advanced ecosystems in the information technology sector, thanks to its strong network of technology parks, software companies, public institutions, and human resources. There are 14 technology development zones in the city. Pioneering structures such as ODTÜ Technology Park, Bilkent Cyberpark, Hacettepe Technology Park, and Gazi Technology Park host hundreds of entrepreneurial companies in the fields of software, electronics, and information technologies. This ecosystem allows both large-scale companies and innovative start-ups to operate together. The presence of public institutions and regulatory authorities in Ankara contributes to the rapid scaling of software and information technology solutions in the sector.

Looking at the sector's focus areas, software for the defense industry, artificial intelligence-based applications, big data solutions, and cybersecurity technologies are particularly prominent in Ankara. Ankara-based companies are also developing important solutions on a national scale in areas such as financial technologies, health informatics, and smart city applications. Computer engineering departments at universities and clusters of startups in technology parks add dynamism to the sector thanks to a qualified young workforce; R&D capacity is gaining momentum in IT-focused innovation.

The IT sector is considered the cornerstone of digital transformation in Ankara's investment and promotion strategy. Digitalization, e-government services, artificial intelligence applications, and IT solutions integrated into the defense industry are increasing Ankara's competitiveness on a global scale. When the early-stage support offered by TEKMERs is combined with the institutional infrastructure of technology parks, Ankara rises to the position of a hub for entrepreneurship and technology in the IT sector, not only nationally but also regionally. This makes Ankara attractive to investors and ensures the rapid commercialization of new-generation IT-focused ventures.

Defense and Aerospace Sector

Ankara is Turkey's central hub for the defense and aerospace industry. In addition to major contractors such as ASELSAN, TUSAŞ, ROKETSAN, and HAVELSAN, hundreds of subcontractors have clustered in OSTİM and Sincan OSB, creating an integrated production ecosystem. A wide range of products, from defense electronics to radar systems, aviation platforms to missile and rocket technologies, are developed in Ankara. TUSAŞ's aircraft, helicopter, and unmanned aerial vehicle projects; ASELSAN's electronic warfare, communications, and radar solutions; ROKETSAN's missile systems; and HAVELSAN's software-based defense solutions have made Ankara a leading player not only nationally but also in the global market.

Ankara's qualified human resources and academic infrastructure play a critical role in the strong development of this sector. Institutions such as METU, Hacettepe, Gazi, Bilkent, and Ankara University provide a constant pool of talent to the sector with the experts they train in engineering and technology. In addition, technology parks in Ankara host startups developing defense-focused software, artificial intelligence, and cybersecurity solutions. Structures such as the OSTIM Defense and Aviation Cluster (OSSA) accelerate the localization of the supply chain by strengthening the cooperation between SMEs and prime contractors. Thanks to this holistic structure, Ankara has become a center of development not only for large companies but also for the supporting industry and startups.

The defense and aviation sector also plays a decisive role in Ankara's export capacity. In the 2024 export data, the manufacturing industry has an absolute weight of 88.7%, and a significant portion of this share comes from defense products and aviation technologies. Unmanned aerial vehicles, armored vehicles, electronic warfare systems, and software-based solutions are among Ankara's leading products in global markets. The increase in exports to the Middle East, Asian, and European markets strengthens the city's international position and increases Turkey's share in high-tech exports.

In the coming period, the development of the defense and aviation sector in Ankara will accelerate further with green transformation and digitalization. New-generation aircraft and helicopter projects that reduce carbon footprint, energy-efficient defense systems, artificial intelligence, and big data-based solutions will guide the sector. This transformation is of strategic importance both for Turkey's national security goals and its economic development vision. With its strong institutional capacity, qualified human resources, and international competitiveness, Ankara is poised to remain a leader in defense and aviation for the next decade.

Pharmaceuticals, Medical Devices and Health Technologies Sector

Ankara is home to one of Turkey's most important healthcare ecosystems. In addition to well-established higher education institutions such as Hacettepe, Ankara, Gazi, and Yıldırım Beyazıt Universities, large-scale healthcare campuses, including Ankara City Hospital, provide a strong infrastructure for medical research and clinical applications. The presence of the Turkish Medicines and Medical Devices Agency in the capital gives Ankara a central role in the sector's licensing, quality standards, and regulatory processes. Although the number of pharmaceutical and medical device companies operating in the city is relatively limited, these companies engage in high value-added production in the fields of biotechnology, medical device manufacturing, and digital health solutions.

Prominent areas in the pharmaceutical and medical device industry include biotechnological drug development, orthopedic products, imaging systems, and laboratory devices. University-hospital-industry collaboration mechanisms support the development of R&D activities while also accelerating clinical research and medical innovation processes. Health technology startups, particularly those located in technology parks, are developing innovative products such as artificial intelligence-based

diagnostic systems, digital health platforms, and biomedical software. Thus, Ankara is becoming a center for the development of future health technologies, going beyond traditional drug and device manufacturing.

In terms of Ankara's investment strategy, the sector is important not only for the domestic market but also for exports and health tourism. The capital's strong hospital infrastructure, qualified human resources, and innovative companies facilitate access to foreign markets for healthcare products and services. Green transformation and digitalization processes are creating new investment areas in the sector through environmentally friendly production techniques and advanced technology-based healthcare solutions. This holistic structure positions Ankara as a strategic center that strengthens the value chain from R&D to commercialization in the field of pharmaceuticals, medical devices, and healthcare technologies.

Furniture Sector

Ankara has a strong cluster in furniture production that has developed around the Siteler region over many years. This production culture, formed by hundreds of SMEs with woodworking and design capabilities, makes the capital competitive not only in the domestic market but also for regional exports. The scale and employment capacity of Siteler are among the key factors that make Ankara stand out nationwide in the field of furniture and interior design.

The Ankara Chamber of Furniture and Lacquer Craftsmen and Artisans (ANKAMOB), which represents the sector's institutional structure, is one of the key institutions contributing to the sustainability of the Siteler ecosystem with its broad membership base. Operating since 1968, the chamber, with its public institution-like professional structure, provides comprehensive services addressing the professional, technical, and economic needs of furniture and lacquer producers. ANKAMOB's primary tasks include maintaining professional standards, issuing mastery and apprenticeship certificates, supporting quality and certification processes, running training programs in areas ranging from production to design, and coordinating with public institutions to resolve sectoral issues. Furthermore, efforts to support the transformation of the production capacity in Siteler in areas such as branding, scaling up, and accessing foreign markets constitute a complementary contribution that aligns with the structural development targeted by the Elmadağ Furniture Specialized Industrial Zone.

The new structure, Elmadağ Furniture Specialized Industrial Zone, plays a critical role in the industrial transformation of this ecosystem. Established on an area of 116 hectares in Elmadağ, the specialized industrial zone has completed its infrastructure work and moved on to the superstructure phase; it has been announced that the first factory has started operations. The region, with the status of Ankara's 12th organized industrial zone, aims to combine Siteler's craftsmanship and flexible production power with organized industrial standards, shared infrastructure, and economies of scale.

With the launch of the specialized OSB, services such as shared logistics and storage areas, modern production facilities, energy and environmental infrastructure, technical training, and quality laboratories are expected to be provided under one roof. This structure will create gains such as increased efficiency in the supply chain, reduced production costs, and acceleration in standardization and certification processes. At the same time, it will create a new springboard for the gradual scaling up of the company base in Siteler and the transition to product ranges suitable for export markets.

From a strategic perspective, the specialization in Elmadağ will increase Ankara's competitiveness in areas such as branding in product design, quality continuity in mass production, adaptation to green transformation (energy-efficient lines, waste management), and supply reliability. While access to Central Anatolia, Black Sea, and Eastern markets will be facilitated through road connections, a

suitable production-logistics platform will also be created for the growth of exports to the Middle East, Caucasus, and Europe. The progress of the project is being monitored through regular coordination meetings between public authorities and local administrations, and investor interest is being confirmed through official announcements.

Construction and Industrial Machinery Sector

Ankara is one of Turkey's most important production centers in the construction machinery sector. There are over 1,600 machinery industry businesses operating in the city, and this capacity ensures the strong organization of construction machinery production and the supporting industry network. Excavators, loaders, cranes, concrete pumps, road construction machinery, crushers, and construction machinery spare parts are produced intensively in Ankara. This production capacity, combined with the city's deep-rooted expertise in machinery manufacturing, has elevated Ankara to a position of national leadership in the construction machinery sector.

OSTİM OIZ is the heart of construction machinery production. The companies clustered here are not only involved in the production of final products but also cover a wide range of supporting industries, from hydraulic systems to engine components. The OSTİM Construction and Industrial Machinery Cluster offers a structure that increases the scale of the sector, inter-company cooperation, and export capacity. The cluster's shared testing centers, certification infrastructure, and clustering support contribute to making Ankara-based manufacturers more competitive in international markets.

İvedik OIZ stands out as another complementary production center for the sector. Metal processing, casting, hydraulic, and mechanical parts manufacturers concentrated in this region are integrated into the supply chain of the main construction machinery manufacturers. The strong auxiliary industry network provided by Ivedik OIZ plays a critical role in terms of quality continuity and production reliability in the sector. Thus, a strong division of labor emerges between the main manufacturers in OSTIM and the auxiliary industry in Ivedik; Ankara gains an integrated production ecosystem in the field of construction machinery.

Sincan OSB, on the other hand, is a production center with larger-scale factories and heavy industrial facilities. Agricultural machinery, large-scale construction machinery, and heavy metal processing facilities are concentrated here. The size of the plots allows for the establishment of high-capacity facilities, enabling Ankara to have an integrated structure that accommodates both small and medium-scale production and large-scale production in the construction machinery sector.

Ankara's competitive advantage in the construction machinery sector is not limited to domestic production. Exports to the Middle East, Africa, and Central Asia markets are increasing; durable machines and spare parts solutions are creating a reliable brand image in international markets. Green transformation and digitalization will play a critical role in the sector's development in the coming period. Electric construction machinery, energy-efficient motor systems, and equipment equipped with IoT and smart sensors are at the center of technology-focused investments by companies in Ankara. This transformation, combined with the production capacity provided by OSTİM and İvedik OSB, will make Ankara a hub for construction machinery production and innovation not only nationally but also internationally.

Ankara's sectoral structure points to a multi-layered economic profile with balanced growth in services and industrial activities. The city's competitive advantage is supported, on the one hand, by its production capacity in advanced technology-focused areas such as software, defense, and aviation; and on the other hand, by sectors with high economies of scale and export potential, such as furniture and construction machinery. The dynamism of the technology park and entrepreneurship ecosystem in IT, global competitiveness in defense and aviation, healthcare infrastructure and biotechnology potential in pharmaceuticals and medical devices, branding opportunities in furniture with the Siteler and Elmadağ

Specialized Industrial Zones, and the production capacity offered jointly by OSTİM, İvedik, and Sincan Industrial Zones in construction machinery are complementary elements in Ankara's economic structure. This holistic structure makes the capital a strong investment and production center not only nationally but also regionally and globally, reinforcing Ankara's strategic position in the coming period based on high value-added production, innovation, and sustainability.

2.7. International Positioning

The Ankara Chamber of Industry has prepared a report titled "Strategic Position in Global Value Chains: Directions and Policy Recommendations for the Ankara Industrial Ecosystem." The report emphasizes that the city is not merely a production center; it must emerge as an actor focused on high value-added technological production, innovation, and sustainability. It notes that approximately 70% of world trade is conducted through GVCs, with more than 50% of exports in developed countries and more than 60% in developing countries taking place through these chains. In this context, it was revealed that Ankara has the potential to participate in decision-making, design, and high-tech production stages thanks to its strong ecosystem consisting of 14 industrial zones, 14 technology parks, 162 R&D centers, and 21 universities.

Three key policy orientations have been highlighted in the report. It has been stated that the commercialization and internationalization dimensions of university-industry cooperation need to be strengthened; that it is important to integrate SMEs more effectively into digitalization and R&D processes; and that it is necessary to develop practical cooperation between vocational training institutions and OSBs. It is anticipated that these priorities will not only increase the productivity of Ankara's industry but also serve to transform it into a center for design, prototyping, and innovation.

In the context of strategic investments, it was emphasized that the ASO Technology Hub and ASO Free Zone projects will play a critical role in Ankara's integration into the KDZ. It is anticipated that the Technology Hub will host more than 800 companies, provide approximately 20,000 skilled jobs, and generate an annual export increase of $1.5 billion. The Free Zone is expected to provide a significant boost to Ankara's economy with 200 companies, 40,000 additional jobs, and a $4 billion contribution to foreign trade. These projects are considered concrete steps towards moving the city to a higher level in global value chains.

The report states that there is a need to strengthen corporate governance mechanisms, prioritize long-term innovation policies, and implement regulations covering knowledge transfer in technology transfer processes. It is stated that initiatives planned within ASO, such as the Access to Finance Center, the SME-Targeted Fund Program, and the Global-Scale Supplier Upgrading Platform, will serve as guidance and capacity development tools to support companies' adaptation to the GVC. With the implementation of these policy orientations and investments, Ankara is expected to position itself more strongly in global value chains.

Ankara is becoming an increasingly visible actor in global value chains. Its high-tech production capacity is accelerating its integration into international markets in strategic areas such as defense, aviation, information technology, and health technologies. Investor relations, foreign trade networks, logistics infrastructure, and trade fair organizations are positioning Ankara as a competitive center on a global scale beyond the national level.

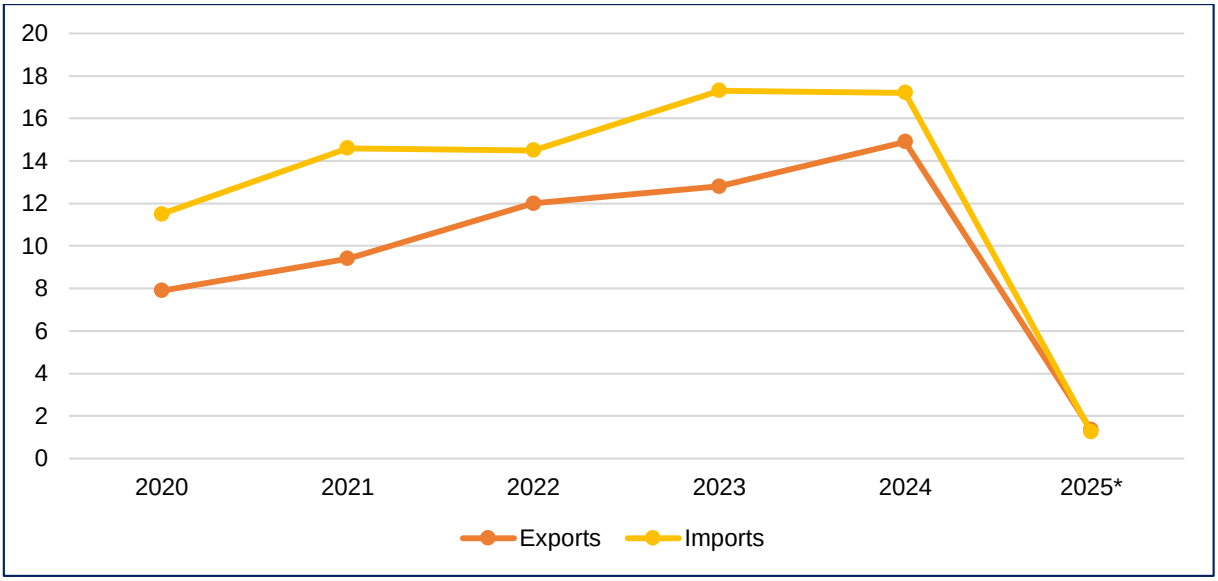
Table 58: Foreign Trade Data for Ankara (Billion USD)

Year	Exports	Imports	Foreign Trade Balance
2020	7.9	11.5	-3.6
2021	9.4	14.6	-5.2
2022	12.0	14.5	-2.5

2023	12.8	17.3	-4.5
2024	14.9	17.2	-2.3
2025*	1.35	1.25	0.1

* As of June 2025.
Source: TÜİK, 2025.

Figure 30: Foreign Trade Data for Ankara (Billion USD)



*** As of June 2025.**
Source: TÜİK, 2025.

Exports grew steadily during the 2020–2024 period, reaching $14.9 billion, while imports remained at a high level. The foreign trade balance fluctuated but narrowed in 2024 compared to previous years. The data shows that Ankara has increased its export capacity but remains dependent on imports for production.

Table 59: Türkiye's Leading Export Sectors and Destination Countries

Country	Top Export Sector
Germany	Motor Vehicles
United States	Automotive Industry
Iraq	Mineral Fuels and Oils
Italy	Motor Vehicles
United Kingdom	Motor Vehicles
France	Motor Vehicles
Russian Federation	Mineral Fuels and Oils
Spain	Motor Vehicles
Netherlands	Motor Vehicles
Romania	Motor Vehicles

Source: TÜİK, 2024.

The motor vehicles sector has a significant weight in Turkey's exports; this sector stands out in exports to major European countries such as Germany, Italy, the United Kingdom, France, Spain, and the Netherlands. In contrast, energy products (mineral fuels and oils) are at the forefront of exports to Iraq and the Russian Federation, thus clearly demonstrating regional differentiation in Turkey's export structure.

Table 60: Countries to Which Ankara Exports (2024–2025)

2024		2025	
Country	**Exports (Million $)**	**Country**	**Exports (Millions $)**
Pakistan	308.3	United Kingdom	129.7
United States	119.2	United States	110.5
China	96.1	China	84.7
Germany	79.0	Germany	74.2
Iraq	72.2	Romania	70.1
Bulgaria	70.0	Bulgaria	70.1
Saudi Arabia	47.3	Hungary	70.0
Italy	37.6	Slovakia	59.3
United Kingdom	31.2	Iraq	35.6
Russian Federation	30.7	Italy	33.8
Exports to Other Countries	**563.4**	**Exports to Other Countries**	**615.7**
Ankara's Total Exports	**1.4 Billion $**	**Ankara's Total Exports**	**1.35 Billion $**

***As of June 2025**
Source: TÜİK, 2024.

Ankara's export structure was shaped more by Middle Eastern and Asian markets in 2024, while the first half of 2025 saw a strengthening shift towards the European domestic market. The prominence of the United Kingdom and Central-Eastern European countries during this period indicates that Ankara's foreign trade continues to be geographically diverse, but its center of gravity has shifted. Although it remains unclear whether this trend will continue throughout the year, it demonstrates that the capital's export capacity can quickly adapt to changing demand conditions.

Table 61: Türkiye’s Leading Import Sectors and Supplier Countries

Country	Top Import Sector
Russian Federation	Mineral Fuels and Oils
China	Electrical Machinery and Equipment
Germany	Motor Vehicles
Italy	Motor Vehicles
USA	Aircraft, Spacecraft, and Parts
Switzerland	Precious Stones and Metals
France	Aircraft, Spacecraft, and Parts
South Korea	Motor Vehicles
Japan	Motor Vehicles
Spain	Motor Vehicles

Source: TÜİK, 2024.

In Turkey's imports, the Russian Federation stands out in mineral fuels and oils, China in electrical machinery and equipment, and Germany, Italy, South Korea, Japan, and Spain in motor vehicles. The distribution of data reveals that Turkey remains dependent on foreign sources for energy and high-tech intermediate goods, while the automotive sector is strongly integrated with production centers in Europe and Asia.

Furthermore, imports of aircraft, spacecraft, and parts from the US and France, and precious stones and metals from Switzerland, indicate that Turkey is turning to external sources in strategic and high-tech areas.

Table 62: Countries from Which Ankara Imports (2024–2025)

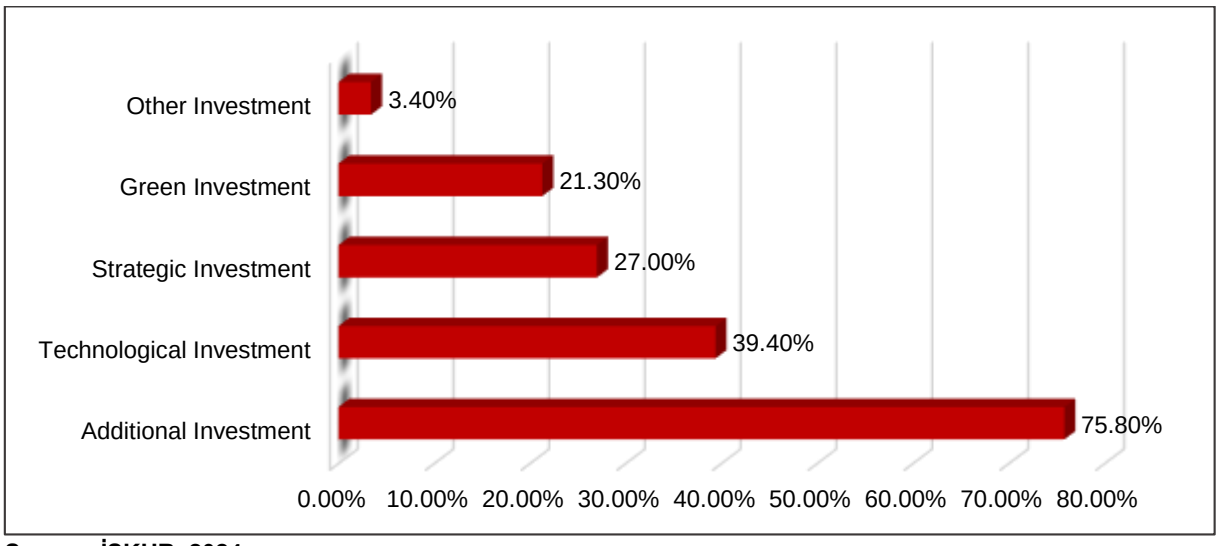
2024		2025	
Country	**Imports (Million $)**	**Country**	**Imports (Millions $)**
Switzerland	320.3	China	246.9
China	292.9	Germany	188.4
Germany	150.7	USA	117.8
Russian Federation	144.7	Italy	76.3
United States	139.5	Poland	64.9
Italy	101.5	Switzerland	60.0
Poland	97.0	Russian Federation	47.8
France	79.6	France	47.8
United Kingdom	42.3	United Kingdom	36.0
Colombia	37.6	South Korea	33.5
Imports from Other Countries	**399.0**	**Imports from Other Countries**	**339.5**
Ankara's Total Imports	**1.8 Billion $**	**Ankara's Total Imports**	**1.25 Billion $**

***As of June 2025**
Source: TÜİK, 2024.

China maintained its leadership in Ankara's imports in the first half of 2025, while Germany and the US showed an increase. Switzerland and Russia experienced rapid declines, while Poland and France maintained their stable positions. The addition of South Korea to the list indicates the development of new supply relationships. The overall picture shows that Ankara's imports continue to be centered on European and Asian supply networks, but with rapid fluctuations for some countries.

13.3% of workplaces in Ankara Province plan to invest in the coming year, and the categories of investment are given below.

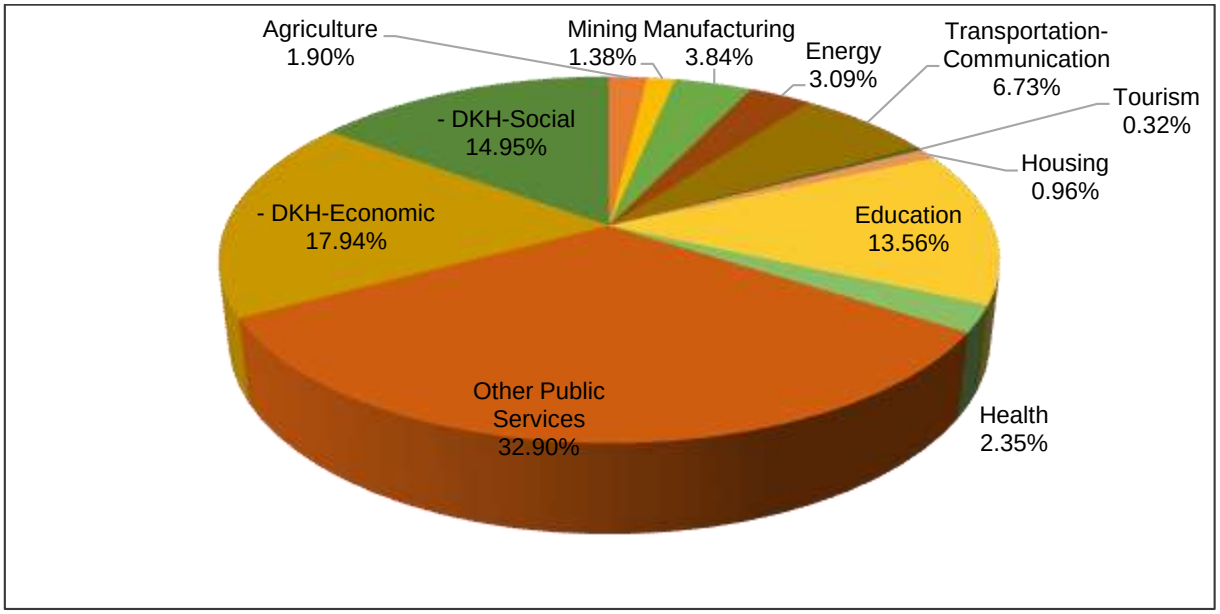
Figure 31: Planned Investments by Workplaces in Ankara



Source: İŞKUR, 2024.

Additional investments (75.8%) constitute the vast majority of planned investments in Ankara workplaces. The findings reveal that businesses are primarily focused on expanding their existing capacities and increasing their production volumes. However, technological investments (39.4%) and strategic investments (27%) indicate a transition to innovative production processes and a quest to strengthen long-term competitiveness . The significant share of green investments (21.3%) highlights that sustainability-focused transformation is becoming increasingly important in the business world. The limited share of other investments (3.4%) clearly reflects the weight of investments shaped around capacity increase, technology, and environment-focused transformation.

Figure 32: Investments in Ankara (2025)



Source: Ankara Governor's Office, 2025.

Other public services (32.9%) account for the highest share of Ankara's investments in 2025, followed by economic (17.9%) and social (14.9%) public services and education (13.6%). Transportation-communication (6.7%) and energy (3.1%) investments indicate infrastructure improvements, while areas such as agriculture, manufacturing, health, and housing are supported with more limited resources. The overall distribution shows that Ankara has adopted an investment approach that prioritizes public infrastructure and social services.

Hata! Başvuru kaynağı bulunamadı. provides information on investment incentive certificates issued i n Ankara. Investment incentive certificates in Ankara are seen to be high-value and job-creating in nature. While the total investment amount is approximately TL 28.4 billion, these investments are seen to create 9,678 jobs.

Table 63: Issued Investment Incentive Certificates

Indicator	Value		
Total Investment Amount (TL)	28,434,722,578		
Total Employment	9,678		
Districts with the Highest Investment	Yenimahalle (189) Sincan (163)	Kahramankazan (139) Akyurt (47)	Çankaya (36)
Sectors with the Most Investment	Manufacturing (712)	Services (93)	Mining (6)

	Energy (206) Agriculture (8)
Capital Type Distribution	Domestic Capital (691) Foreign Capital (13)

Source: Created using data from the Ministry of Industry and Technology, 2025.

The concentration of the most investment in Yenimahalle, Sincan, and Kahramankazan at the district level reveals that Ankara's industrial and production axes are concentrated in these regions. Akyurt and Çankaya also stand out among the districts attracting investment.

In terms of sectoral distribution, manufacturing (712 documents) is the clear leader, reflecting Ankara's production-oriented investment character. The energy sector (206) ranks second, while services (93) account for a more limited share. The very low number of investments in areas such as agriculture and mining indicates that Ankara's

In terms of capital type distribution, domestic capital dominates (691), while the share of foreign capital remains quite limited (13). The data shows that investments in Ankara are largely undertaken by local entrepreneurs. It is observed that investments in Ankara are concentrated in the manufacturing and energy sectors, especially in industrial districts, while the attractiveness of foreign capital remains relatively low.

Hata! Başvuru kaynağı bulunamadı. shows the actual size of investments that have received c ompletion visas in Ankara. The total fixed amount of investments implemented with 118 documents is 1.65 billion TL, and the employment provided is 2,632 people.

Table 64: Completed Investment Incentive Certificates

Indicator	Value
Total Number of Documents	118
Total Fixed Investment Amount (TL)	1,656,723,712
Total Actual Employment	2,632
Most Completed Sectors (Top 5)	Primary Education Services (10) Electricity Generation, Transmission, and Distribution (9) Manufacture of Medical and Surgical Equipment and Orthopedic Devices (8) General Secondary Education Services (7) Manufacture of Other Special-Purpose Machinery (6)

Source: Created using data from the Ministry of Industry and Technology, 2025.

When examining the sectoral distribution, it is seen that a significant portion of investments are concentrated in the fields of education (primary and secondary education services) and energy (electricity generation, transmission, and distribution). In addition, the manufacture of medical and surgical equipment and orthopedic devices stands out within the scope of health technologies. Overall, it is understood that completed investments in Ankara are directed towards human capital development (education) on the one hand, and infrastructure and high value-added production (energy and medical devices) on the other.

It is seen that education, energy, and health technologies have become priority areas in Ankara's completed investments, while manufacturing is concentrated more on niche products based on advanced technology.

While industrial and energy investments predominate at the application stage, the education and health sectors come to the fore during the completion process. The data reveals that large-scale projects require longer-term processes, while service-oriented investments yield results in a relatively short time.

The completion performance of applications from districts with a high concentration of industrial investments is noteworthy, with completion trends varying in duration and rate depending on the type of investment.

Hata! Başvuru kaynağı bulunamadı. shows the scale and sectoral distribution of foreign-capital i nvestments in Ankara. A total of 236 foreign-capital firms are operating, with the highest number of ventures coming from the US (28), Germany (26), and the Netherlands (21); Italy and Spain also stand out with 17 firms each.

Table 65: Foreign-Capital Companies Operating in Ankara

Indicator	Value
Total Number of Companies	236
Countries with the Most Companies (Top 5)	USA (28) Germany (26) Netherlands (21) Italy (17) Spain (17)
Most Common Areas of Activity (top 5)	• Wholesale trade and trade brokerage excluding motor vehicles and motorcycles (39) • Other business activities (30) • Construction (22) • Other service activities (21) • Extraction of crude petroleum and natural gas, excluding exploration and prospecting, and related service activities (20)

Source: Created using data from the Ministry of Industry and Technology, 2025.

Wholesale trade and trade brokerage rank first among the areas of activity. Foreign capital investments in Ankara are dominated by European and US-based companies; activities are concentrated in areas that are relatively flexible and can be spread across different sectors, such as trade, services, and construction.

Foreign capital investments in Ankara are also active in the information technology, defense and aerospace, pharmaceutical and health technologies, furniture, and industrial and construction machinery sectors. These investments play an important role, particularly in technology-intensive areas, in terms of knowledge transfer and integration into the global value chain.

Table 66: Angel Investor License Applications in Ankara

Years	Number of Licenses
2022	73
2023	93
2024	107
2025	111

2025 Second Quarter Data.
Source: Ministry of Treasury and Finance, 2025.

Hata! Başvuru kaynağı bulunamadı. shows that angel investor license applications in Ankara have b een steadily increasing over the past four years. The number of applications, which was 73 in 2022, has risen to 111 as of the second quarter of 2025. This increase reveals that interest in the entrepreneurial ecosystem in Ankara is growing, and awareness and capital orientation towards early-stage investments are increasing.

The most coded products and activities in Ankara are presented in the tables below. When evaluated together, these two tables reveal that Ankara has strong capacity in the manufacturing industry and software sector.

Table 67: Most Frequently Coded Products in Ankara

Rank	Code	Description	Capacity Report Number
1	62.01.29.00.01	Other software, originals	331
2	25.11.23.60.00	Other structures, made of iron or steel	292
3	25.62.10.03.00	Turned metal parts, for machines and mechanical devices	194
4	10.71.12.00.01	Baklava, kadayif, and other pastries sweetened with syrup	171
5	26.51.12.39.00	Other electronic devices and appliances not classified elsewhere	159

Source: TOBB, 2024.

When examining the product table, it is noteworthy that the most coded product is original software (331 reports). The data indicates that Ankara is a prominent center in the field of information technology and softwa . However, products such as iron and steel structures (292), turned metal parts (194), and electronic devices (159) reflect the city's strong industrial infrastructure. In the food sector, flour products such as baklava and kadayıf (171) demonstrate Ankara's local production diversity.

Table 68: Most Frequently Coded Activities in Ankara

Rank	Code	Description	Capacity Report Count
1	25.11	Manufacture of metal structures and structural components	525
2	26.51	Manufacture of instruments and apparatus for measuring, testing, and navigation	399
3	25.62	Machining and shaping of metals	351
4	28.92	Manufacture of mining, quarrying, and construction machinery	337
5	25.50	Metal forging, pressing, stamping, and rolling; powder metallurgy	309

Source: TOBB, 2024.

The activities table shows that Ankara's industrial capacity is particularly based on metal manufacturing. The leading areas are metal structure and parts manufacturing (525), measurement and testing equipment production (399), metal processing (351), and mining and construction machinery manufacturing (337). Furthermore, advanced processing activities such as forging, pressing, and powder metallurgy (309) also reveal that Ankara's production chain includes high value-added processes.

Based on this data, it can be said that Ankara's production structure is shaped around two main axes:

- High technology and software (especially original software and electronic products),
- Industry and metal manufacturing (iron and steel structures, metal processing, and machine production).

Ankara has a strong diversity in both technology-based sectors and traditional industrial production, and these two areas appear to complement each other.

Ankara's international position is shaped by its high-tech production capacity, industry-energy-focused investment trends, and diversifying foreign trade relations. While strengthening its identity as a regional production center in manufacturing and advanced technology, the city is also establishing stronger links to global networks through increased dynamism in its entrepreneurship and investment ecosystem. Despite the limited share of foreign capital, Ankara's expanding export portfolio, the focus of completed investments on education, energy, and health technologies, and the increase in angel investor applications stand out as key dynamics supporting the city's long-term competitiveness. This picture shows that Ankara has strategic diversity for sustainable growth and strengthens its potential to play a more effective role in global value chains.

3. GLOBAL TRENDS IN FOREIGN DIRECT INVESTMENT

3.1. Global Foreign Direct Investment Trends

Understanding the development of global foreign direct investment (FDI) trends requires a close examination not only of companies' investment strategies but also of the fundamental dynamics of the world economy. As of 2024, international investments have been an area directly reflecting fluctuations in the global economy.

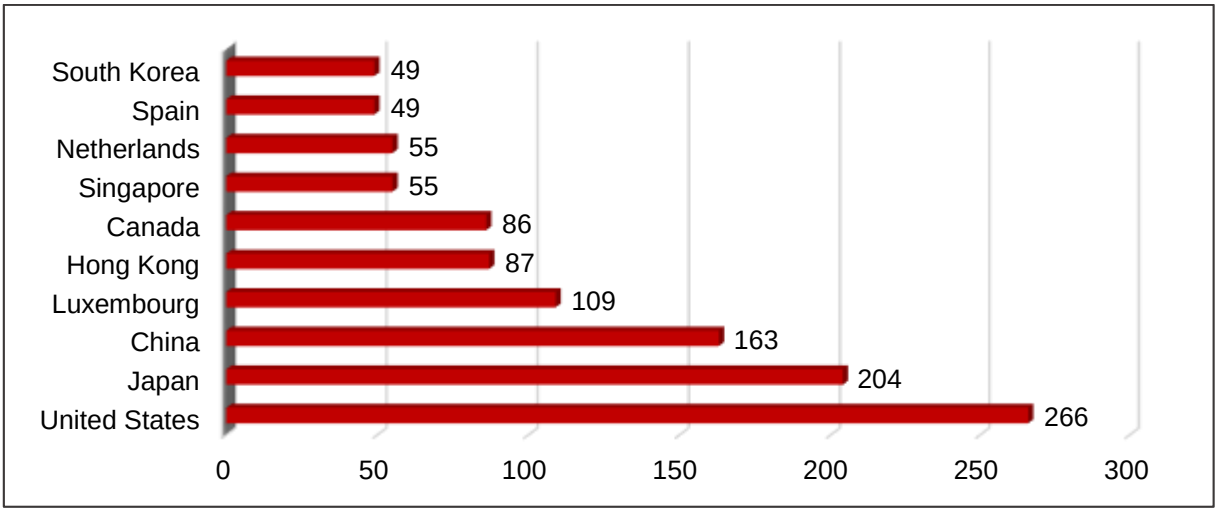
The European and Central Asian Economic Update (2025) report published by the World Bank reassesses the growth dynamics of countries in the region and emphasizes the necessity of a transformation based on entrepreneurship, technology adoption, and innovation for sustainable development. According to the report, although the growth achieved in recent years has largely been based on the redistribution of resources, this model is insufficient to generate productivity gains in the long term. For high value-added and sustainable economic growth, companies need to develop their innovation capacities, adopt technology more rapidly, and strengthen the entrepreneurial ecosystem.

Regional findings show that economic growth is vulnerable to external shocks and that the production structure remains based on low and medium technology. The lack of early-stage capital and venture capital in the entrepreneurial ecosystem limits SMEs' ability to take innovative steps. Furthermore, despite the acceleration of digitalization, the inability to achieve economies of scale and the shortage of skilled labor are among the key barriers to innovation. The report emphasizes that countries need to develop comprehensive policy approaches to escape the low productivity trap. Increasing R&D investments, developing financing mechanisms that support entrepreneurship, strengthening university-industry collaboration, and implementing skills-focused education policies are among the priority steps.

It is clear that the economic context is decisive for direct investments. Economies that do not ensure sustainable growth, innovation, and productivity gains cannot be attractive for long-term foreign capital.

According to the World Investment Report (WIR) 2025 published by the United Nations Conference on Trade and Development (UNCTAD), the global WIR volume reached approximately $1.5 trillion in 2024. Although this figure indicates a modest 4% increase over the previous year, excluding the impact of intermediary economies known as investment-transit economies, there has actually been an 11% decline in global flows. Despite the apparent stability of international investments, investments based on real economic activity have declined.

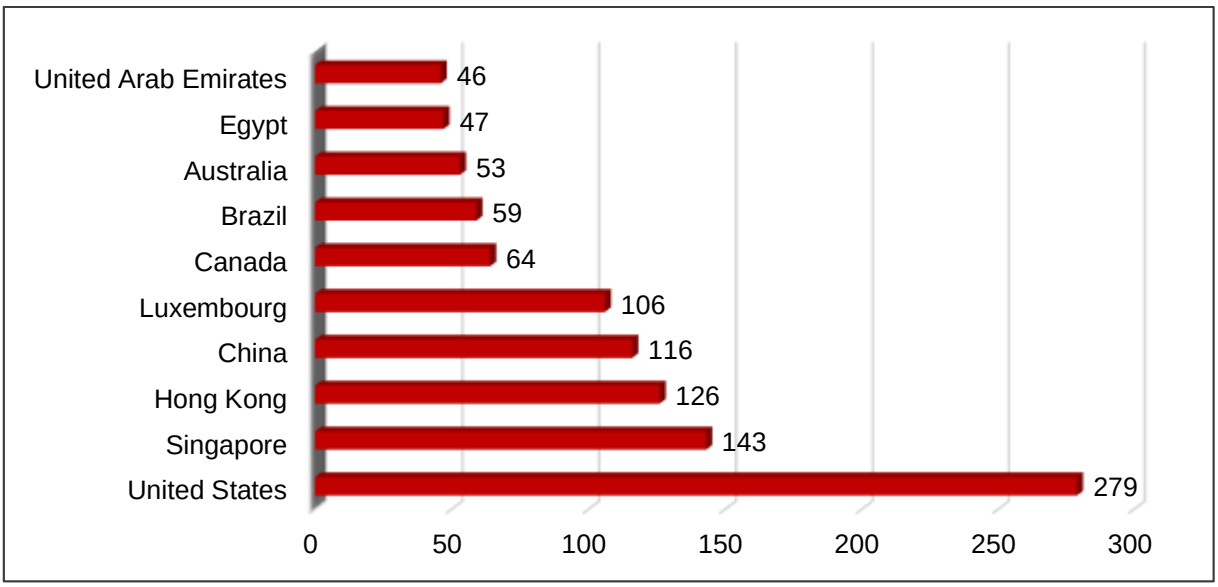
Figure 33: Foreign Direct Investment – Top 10 Economies (Billion USD, 2024)



Source: United Nations, 2025.

The US is by far the country attracting the most investment, while Singapore and Hong Kong are other prominent centers. The emerging picture shows that Asia has become a rising investment center.

Figure 34: Foreign Direct Investment – Top 10 Economies (Billion USD, 2024)



Source: United Nations, 2025.

The US, Japan, and China lead in global investment outflows. The data reveals that both capital-exporting developed economies and Asian economies increasing their production capacity are decisive in international investment flows.

Looking at the components of investment in the 2025 World Investment Report, greenfield projects, which represent new investments in industry, increased by 3% in terms of number but declined by 5% in terms of value. Investors appear to be turning to a large number of small and medium-sized projects, while being cautious about large-scale investments. International project financing experienced a significant decline, particularly in infrastructure investments, contracting by 26%. In contrast, cross-border mergers and acquisitions increased by 14% in value terms. Although the number of transactions decreased, the continuation of large-scale deals confirms that capital is being directed towards fewer, selected projects.

Regional distributions reveal the restructuring of the global investment landscape. Developed economies, particularly Europe, have experienced a significant contraction, with investments to the continent declining by 58%. However, investments directed to North America have increased by 23%, signaling a recovery. Emerging economies have historically surpassed developed countries, accounting for 57.5% of total global FDI. The African continent showed a 75% increase due to a single large project, and even excluding this project, the continent still experienced 12% growth overall. Although investments in Asia as a whole fell by 3%, Southeast Asia recorded a 10% increase with a volume of $225 billion, reaching the second highest level in the global total. Investments in Latin America and the Caribbean declined by 12%.

A different picture emerges when looking at vulnerable country groups. Least developed countries (LDCs) recorded a 9% increase in investment, small island states a 14% increase, while landlocked developing countries experienced a 10% decline. The result shows that global investment waves have different effects on the most vulnerable economies and, in particular, limit the competitiveness of landlocked countries with high transportation costs.

The sectoral distribution of foreign direct investment in 2024 reveals both vulnerabilities in the global economy and new areas of opportunity. A 28% decline was observed in the energy and gas sector, and

a 16% decline in renewable energy projects. Similarly, there was a contraction in funding for development- -focused areas such as agriculture, water, and infrastructure, with the emerging trend pointing to a risky picture in terms of achieving global sustainability goals.

The healthcare sector has been one of the exceptional areas that stood out in 2024. The continuation of structural needs arising after the pandemic increased investments by over 20%; new capital inflows occurred in pharmaceuticals, biotechnology, and medical device production. The healthcare sector continues to be a long-term investment magnet. Healthcare and biotechnology investments will continue to strengthen steadily in line with increasing global needs.

The strongest growth has been recorded in the digital economy. Investments in digitalization have increased by 14%; areas such as data centers, cloud services, artificial intelligence, the gaming sector, and financial technologies (fintech) have come to the fore. UNCTAD data estimates that the digital economy will reach $16.5 trillion by 2028, but notes that the infrastructure gap remains at $1.6 trillion. The data reveals that despite the rapid scaling of digital transformation investments, there are serious inequalities in global access.

The overall picture shows that global foreign direct investment has been on a downward trend for the past two years, with a sharp decline in project financing, particularly for infrastructure and sustainability-focused projects. The increase in digital economy-focused investments indicates that capital is shifting towards selective, high-yield areas. The recovery in North America and Southeast Asia, in contrast to the decline in Europe, shows that the investment geography is being rebalanced. The rise in Africa points to the continent's growing strategic importance, while the decline in Latin America confirms its fragility.

3.2. Implications of Global Foreign Direct Investment Trends for Turkey

In 2024, not only energy, healthcare, and the digital economy, but also manufacturing and services sectors showed noteworthy developments in the sectoral breakdown of foreign direct investment. In the manufacturing industry, the automotive and electronics sectors followed different paths, particularly due to the impact of supply chain restructuring and shifts in the geography of production. The automotive sector came to the fore with increased investments in electric vehicles and battery production facilities, while investments based on traditional engine technologies declined. The electronics sector continued to be a strategic investment area, thanks to capacity increases, particularly in semiconductors and microchip production. In the service sector, digitalization investments in financial services gained momentum, while investments in logistics and distribution infrastructure showed an upward trend despite fluctuations in global trade. Furthermore, capital flows continued, albeit limited, in areas such as culture, media, and creative industries, with the digital content production and gaming sectors beginning to attract investor interest.

In 2024, emerging economies continued to attract a significant portion of global FDI flows, with some countries becoming regional investment hubs. In Africa, countries such as South Africa and Nigeria stood out due to the impact of mega projects focused on energy and infrastructure, while in North Africa, Egypt became a regional center of attraction with increasing industrial investments. In Asia, Southeast Asian countries in particular recorded high investment volumes due to diversification in global supply chains. Countries such as Vietnam, Indonesia, and Thailand attracted new investments in electronics, automotive, and digital services by increasing their production capacity.

Trends show that emerging economies are attracting global investors not only with their low-cost advantages but also with their capacity to become regional hubs and their growth potential in strategic sectors. Consequently, the new geographies where global capital is directed contribute to a more balanced distribution of investments and create long-term development opportunities for emerging countries.

According to data from the Organization for Economic Cooperation and Development (OECD), global direct investment flows decreased by 14% in the first quarter of 2025 compared to the previous quarter and by 15% compared to the same period last year. In the OECD region, inflows declined by 18% and outflows by 33%. The data shows that investments have declined significantly in European Union countries, while G20 economies have seen declines of up to 30%. Investments in China, in particular, have declined for the third consecutive year, while the United States, Luxembourg, and Canada were the top investment destinations in 2024.

Looking ahead, investment flows are expected to take shape around two main axes. Green transition investments have the potential to gain momentum again within the framework of global climate policies and carbon regulations. Digital sectors, particularly artificial intelligence and financial technologies, are considered to be the areas with the highest growth potential over the next decade.

At a time when global foreign direct investment has declined, Turkey's investment performance has stood out positively. According to data from the Central Bank of the Republic of Turkey, Turkey recorded $11.3 billion in foreign direct investment (FDI) inflows in 2024, diverging positively from global trends. This figure represents a 5.6% increase compared to 2023. Looking at the distribution of investments coming to Turkey by country, the Netherlands ranked first with 23.6%, followed by Germany (11.5%) and the US (10.3%). Ireland, Azerbaijan, Switzerland, the United Kingdom, the United Arab Emirates, France, and Norway were also among Turkey's leading investors. When examining the sectoral distribution, the manufacturing industry accounted for the highest share with $2.3 billion, representing 34.5% of total inflows, and recorded a 32.5% growth on an annual basis. Manufacturing was followed by wholesale and retail trade (25.3%) and transportation and logistics (7.2%).

When assessing Turkey's alignment with global investment trends, findings from institutional structures that monitor international investors' perceptions and expectations of the country also serve as an important reference. In this context, YASED (International Investors Association), whose views were sought, shared its assessments on the regulatory framework in the investment environment, qualified investment categories, and sector-based trends, given its structure that represents multinational companies in Turkey. The association emphasizes that Turkey has the potential to increase its competitiveness, particularly in areas such as high technology, digital economy, defense, and health technologies, and that Ankara occupies a strategic position in most of these sectors. Furthermore, assessments regarding predictability in investment processes, strengthening supply chain integration, widespread adoption of sustainability criteria, and targeted international promotion activities demonstrate how global FDI trends are reflected at the national level.

The Turkey International Direct Investment Strategy (2024-2028) defines eight qualified IDI profiles in line with global trends: climate-friendly investments, digital investments, global supply chain-focused investments, knowledge-intensive investments, investments that provide skilled employment, value-added service investments, qualified financial investments, and investments that support regional development. The strategy is based on three main axes: aligning with global trends through green and digital transformation investments, benefiting from the restructuring of global supply chains, and strengthening the role of qualified human resources, technology entrepreneurship, and regional hubs. The wider region, including Turkey, stands out as one of the leading destinations for global FDI flows thanks to its strategic location.

Turkey has risen to become the second-largest economy in the region in terms of attracting investment, drawing $261 billion in investments between 2004 and 2023, with a 9.8% share. The key findings guiding the strategy provide a comprehensive assessment of Turkey's regional position in line with global trends. Despite the slowdown in global FDI flows, investments directed to the region show an upward trend, with significant gains being made, particularly in the high value-added service sector. The emergence of green transformation and sustainability concepts as decisive factors in investment flows creates strategic opportunities for Turkey, while global value chains reshaped by the concepts of "near sourcing"

and "sourcing from friendly countries" reinforce the country's regional leadership in manufacturing, food-agriculture, and expansion investments. The acceleration of digitalization, protectionist tendencies triggered by trade and technology wars, the increasing role of mega projects, and investments in technology startups are also directly affecting the investment environment . The support of international investors for Turkey's role as a production and export hub is emerging as a critical factor in strengthening this position.

Six policy areas have been identified to develop Turkey's investment portfolio in terms of quality and quantity. These areas are investment environment competitiveness, green transformation, digital transformation, global supply chain, qualified human resources, and communication and promotion. Prominent steps in the action plans implemented in line with these policy areas include creating an inventory of investment locations suitable for investors' needs, attracting international companies' shared service centers to the country, strategically prioritizing long-term investment loans, and introducing incentive mechanisms to accelerate the green and digital transformation of industry. Furthermore, the aim is to modernize the investment environment by strengthening the technology entrepreneurship ecosystem, activating venture capital funds, promoting sustainable financing instruments, and introducing new regulations such as green taxonomy. In this way, Turkey aims to increase investor confidence while accelerating the transformation process in line with global trends.

Table 69: Selected Factors Affecting Foreign Direct Investment in Türkiye

Attractive Factors	Limiting Factors
Geostrategic Location: Access to European, Asian, and Middle Eastern markets; strong logistics infrastructure	**Macroeconomic Fluctuations:** Exchange rate volatility, high inflation, and occasionally unpredictable financial conditions
Young and Dynamic Population: 84 million market, growing middle class, broad consumer base	**Regulatory Predictability:** Lengthy legal processes, perceived uncertainty in regulations
Cost Advantage in Labor: Relatively low labor costs, strong engineering and technical capacity	**Skilled Labor Shortage:** Potential shortage of human resources in high-tech fields
Manufacturing Industry Strength: Regional leadership in sectors such as automotive, machinery, chemicals, and food-agriculture	**R&D and Innovation Gap:** Limited innovative capacity, insufficient early-stage funding
Customs Union Relationship with the EU: Direct access to the European market	**Global Protectionist Trends:** Pressure on foreign trade from trade wars and protectionist policies
Digital Economy and Technology Initiatives: Leadership in high-tech exports, rapid growth in areas such as fintech, gaming, and artificial intelligence	**Gaps in Sustainability Investments:** Investment contraction in SDG-compliant sectors such as energy, agriculture, and infrastructure
Green Transformation Potential: Attractive opportunities for renewable energy investments and CBAM compliance processes	**Energy Costs and Resource Dependency:** High energy costs in industry can complicate investment decisions
Opportunity to Become a Regional Hub: Standing out with trends toward sourcing from nearby and friendly countries	**Geopolitical Risks:** Regional instability and security perceptions

3.3. Foreign Direct Investment in Ankara: Data Limitations and Indicators

Official data on foreign direct investment in Turkey is published at the country level by the Central Bank of the Republic of Turkey and international organizations, but is not presented separately for each city. Therefore, it is not possible to express the amount of direct investment coming to Ankara in clear figures. However, it is clear from existing indicators and sectoral capacity that Ankara stands out as a strong center for international direct investment.

Ankara is the heart of Turkey's defense and aerospace industry. The city, which is home to companies operating on a global scale in the defense industry, accounts for approximately half of the country's total defense industry turnover . In addition, the Aviation and Space Specialized Industrial Zone, with a capacity of 7 million square meters, has become one of the centers of defense and aviation investments not only in Turkey but also in the region. Ankara-based defense industry companies have attracted attention by ranking among the world's top 100 defense companies in the Defense News Top 100 (2025) list: ASELSAN ranked 43rd, TUSAŞ 47th, ROKETSAN 71st, ASFAT 78th, and MKE 80th. This emerging structure creates a strong attraction for international investors seeking assets and technology.

Ankara also boasts one of Turkey's most advanced technology and R&D ecosystems. As of 2025, 14 Technology Development Zones are operating in Ankara. The city's technology development zones are home to hundreds of startups and thousands of R&D personnel; this ecosystem is further strengthened by prestigious entities such as the NATO DIANA accelerator center, which directly connects Ankara to international deep tech networks.

AnkaTheraHub, established in the field of health and biotechnology, has created a new cluster center for pharmaceutical and medical technology investments. Ankara is quite diverse in terms of industrial infrastructure. The numerous organized industrial zones in Ankara offer a strong production base in the fields of machinery, automotive supply industry, electronics, medical devices, and food processing. The fact that there are more than 6,200 businesses and approximately 60,000 employees in OSTİM alone means access to a broad supplier ecosystem for international investors.

There are also some factors that limit Ankara's investment attraction potential. In particular, the distance from ports increases logistics costs in heavy and processing industries, creating a disadvantage for sectors dependent on sea transport. For this reason, strengthening rail and road corridors connected to ports is of critical importance. Furthermore, to increase the supply of skilled labor in high-tech sectors, university-industry collaborations must be further developed, skills-focused education programs must be expanded, and green transformation infrastructure that meets foreign investors' sustainability criteria must be rapidly implemented. To make Ankara more visible to international investors, it is important to increase the number of direct flights, strengthen international promotion activities, and attract investment-focused organizations to the city. Since most globally prominent international events are concentrated in Istanbul, this prevents Ankara from sufficiently showcasing itself to global investors. Ankara's ability to secure a larger share of international direct investment depends on strengthening both its logistics integration and its human resources and sustainability infrastructure, as well as developing its global access and promotion capacity.

4. FIELD STUDIES

4.1. Stakeholder Interviews

As part of the Ankara Provincial Investment and Promotion Strategy 2025-2028, comprehensive meetings were held to obtain information on the current situation, needs, and expectations regarding the province's investment environment directly from stakeholders. Opinions were gathered from a wide range of stakeholders, including organized industrial zones, chambers of commerce and industry, stock exchanges, professional associations, technology parks, NGOs, and companies.

In these contacts with a total of 26 institutions and organizations and 30 companies, assessments were obtained on areas considered critical for Ankara's economic development, such as infrastructure, production, human resources, technology, financing, tourism, and branding. Stakeholder contributions provide direct input to both the current situation analysis and the determination of priorities for the future period in the strategy document.

The stakeholder meetings have enabled a clearer picture of Ankara's economic and sectoral structure, highlighting its strengths, critical issues, and priority needs. The cluster capacity in the defense and aviation industries, the technical infrastructure of universities, and the qualified human resources in the field of engineering stand out as key factors enhancing Ankara's competitiveness at the national and international levels. In addition, it has been assessed that areas such as medical, software-IT, and agricultural technologies also have development potential, and that the city could achieve a diversified economic structure in the coming period.

Infrastructure and logistics deficiencies were among the issues most emphasized by stakeholders. Inadequate road, air, and rail connections, limited direct flights, lack of port integration, and absence of an effective logistics hub network were cited as the main factors reducing Ankara's investment attractiveness. Furthermore, the lack of elements such as exhibition areas and free zones constitutes a structural obstacle that limits foreign trade capacity.

The issue of human resources is also one of the common points of discussion. Although Ankara has an advantageous position in terms of its young population with higher education degrees, the need for intermediate and technical personnel in the industrial and manufacturing sectors cannot be met. The inability of vocational training institutions to adapt to current technologies, the limited availability of on-the-job training programs, and the difficulties businesses face in finding qualified personnel directly limit production capacity. Furthermore, the employment pressure created by migration movements deepens the problems of adaptation in the labor market.

The most frequently cited problems in terms of the investment environment and production processes are high land costs, difficulties in accessing finance, and the short-term nature of existing support mechanisms. It has been stated that rising land prices in industrial areas are discouraging investors, credit costs have reached prohibitive levels for entrepreneurs, support is mostly limited to the prototype stage, and mechanisms for scaling up are inadequate. These conditions make long-term and sustainable investment planning difficult.

Significant shortcomings have also been identified in branding, promotion, and tourism. Despite Ankara's status as the capital, its low visibility at the national and international levels, the underdevelopment of exhibition and conference tourism, the insufficient promotion of cultural heritage, and the weakness of digital promotion channels limit the province's visibility. The existing capacity in areas such as health tourism and elderly/disabled care cannot be converted into economic added value because it is not supported by a comprehensive vision.

In terms of governance and cooperation, despite the presence of numerous industrial zones, technology parks, universities, and professional organizations, effective coordination mechanisms have not been

developed. The fragmented nature of clustering efforts, the inadequacy of common platforms, and the lack of a strong culture of cooperation at the institutional level prevent the effective use of existing potential. It has been emphasized that Ankara's long-term investment strategies should be designed to increase inter-institutional coordination and joint action capabilities.

Although the findings from stakeholder interviews reflect the priorities of different institutions, they are concentrated around certain themes in terms of content. These themes are the infrastructure and logistics conditions affecting Ankara's investment environment, industrial and production capacity, human resource structure, investment environment and financing conditions, branding and tourism activities, and governance and cooperation dynamics. The thematic analysis table prepared for stakeholder interviews is provided below.

Table 70: Thematic Analysis of Stakeholder Interviews

Theme	Key Issues	Expectations
Infrastructure and Logistics	Insufficient port integration, weak rail connections, lack of direct flights, scattered logistics centers, lack of exhibition space and free zone	Strong transportation connections, development of logistics bases, establishment of an exhibition area, creation of a free zone
Industry and Production	Lack of shared facilities, insufficient testing and R&D centers, high cost of industrial land, companies unprepared for green and digital transformation	Shared facilities and infrastructure, R&D and testing centers, corporate support for green and digital transformation
Human Resources	Shortage of intermediate personnel, inability to update vocational training institutions, limited on-the-job training programs, difficulty in finding qualified technical personnel	Strengthening vocational education, expanding on-the-job training practices, increasing university-industry cooperation
Investment Environment and Financing	High land costs, credit costs that burden investors, short-term and fragmented support mechanisms	Longer-term and accessible investment incentives, sustainable financing models
Branding and Tourism	The city's low international visibility, insufficient promotion of cultural heritage, weak digital promotion channels, limited use of health tourism potential	Branding Ankara on a global scale, more effective promotion of cultural values, development of digital promotion, focused initiatives in health and tourism
Governance and Cooperation	Lack of coordination between institutions, fragmented clustering efforts, insufficient common platforms, weak culture of cooperation	Strengthening joint planning processes, developing clustering and cooperation mechanisms

Stakeholder meetings have formed a fundamental reference point in shaping Ankara's investment and promotion strategy. The findings from these meetings have clarified the province's strong sectors as well as the structural obstacles encountered and priority areas of need. The emerging trends show that Ankara has the potential to increase its competitiveness in strategic sectors such as defense and aviation, medical, and information technology; however, this potential cannot be fully realized due to limitations in logistics infrastructure, human resources, branding, and institutional cooperation.

Stakeholder contributions reveal that Ankara's economic vision must be addressed not only through sectoral development but also in conjunction with spatial planning, governance capacity, and international competitiveness dimensions. The priorities emerging from the discussions will provide key

inputs for policy recommendations and roadmaps in the next stages of the strategy; they will be particularly indicative in terms of strengthening the investment environment, training a qualified workforce, and supporting international branding.

In the process of preparing the Ankara Investment and Promotion Strategy, qualitative data obtained from events organized by or involving the Ankara Development Agency, in addition to face-to-face interviews, were also taken into consideration. Qualitative findings obtained during panels and workshops were systematically compiled. In this context, session notes, speaker highlights, and participant feedback were classified using thematic coding methods, and common trends and policy needs were identified. The findings obtained were transferred below as report data for the strategy's priority areas, implementation tools, and monitoring and evaluation framework. Below is a summary of the findings compiled from the "Women's Investment and Entrepreneurship" panel, "Investor Talks with a Focus on Health," and "The Game in the Second Century" panel.

The "Women's Investment and Entrepreneurship" panel, organized by the Ankara Development Agency, provided qualitative input on the Ankara entrepreneurship ecosystem as part of the fieldwork. The panel outputs show that although women's visibility in the field of investment is still limited, positive momentum has been gained through increasing awareness and role models. Participant views revealed that the inclusion of women in investment processes is critical not only in terms of economic growth and capital formation, but also in terms of strengthening diversity and inclusiveness in the ecosystem.

The areas of need identified in the panel provide concrete guidance for policy and program design. First and foremost, women need to be more effectively positioned in investor networks and decision-making mechanisms. Increasing the visibility of successful women entrepreneurs and investors is important. It was emphasized that mentoring, networking, and experience-sharing mechanisms should be widespread; targeted training aimed at increasing financial literacy and self-confidence should be multiplied; and the specific barriers women face should be systematically identified and addressed. Capacity building programs, role model showcases, regulations that strengthen network access, and regulatory improvements should be implemented; progress should be monitored with measurable indicators within a monitoring and evaluation framework.

The panel and workshop outputs of the "Investor Talks Focusing on Health" conducted by the Ankara Development Agency show that Ankara has a strong ecosystem in health and medical technologies; however, some bottlenecks need to be addressed to increase the scale of investment. The goals should be to strengthen the entrepreneurship-investment links within the ecosystem, make the capacity for health tourism visible, and deepen public-private-university cooperation. The limited number of direct international flights is a major obstacle to scaling up health tourism; the level of health tourists coming to Ankara and the size of the potential market point to the need to increase connectivity.

Priorities should focus on scaling up domestic production to reduce dependence on imported medical devices and strengthening cluster infrastructure. When considering the planned R&D, testing, and accreditation infrastructure of the Health Valley, a comprehensive value chain design that will accelerate clinical validation, commercialization, and export phases appears feasible. In parallel, streamlining regulatory processes and increasing their predictability, strengthening health tourism promotion targeting target markets, and developing new direct flight routes should be prioritized among the implementation tools of the Ankara Investment and Promotion Strategy.

The "Game in the Second Century" panel organized by ASO revealed that Ankara has a strong competence base in the field of gaming and simulation; however, it highlighted the need for policy-regulation, commercialization, and coordination in the talent chain for scaling up. In addition to the economic dimension of the sector, its cultural and visionary nature was emphasized; institutionalizing university-industry cooperation, simplifying access to public incentives, increasing predictability in regulatory transitions, and strengthening the STEM talent pool through mentoring-internship-

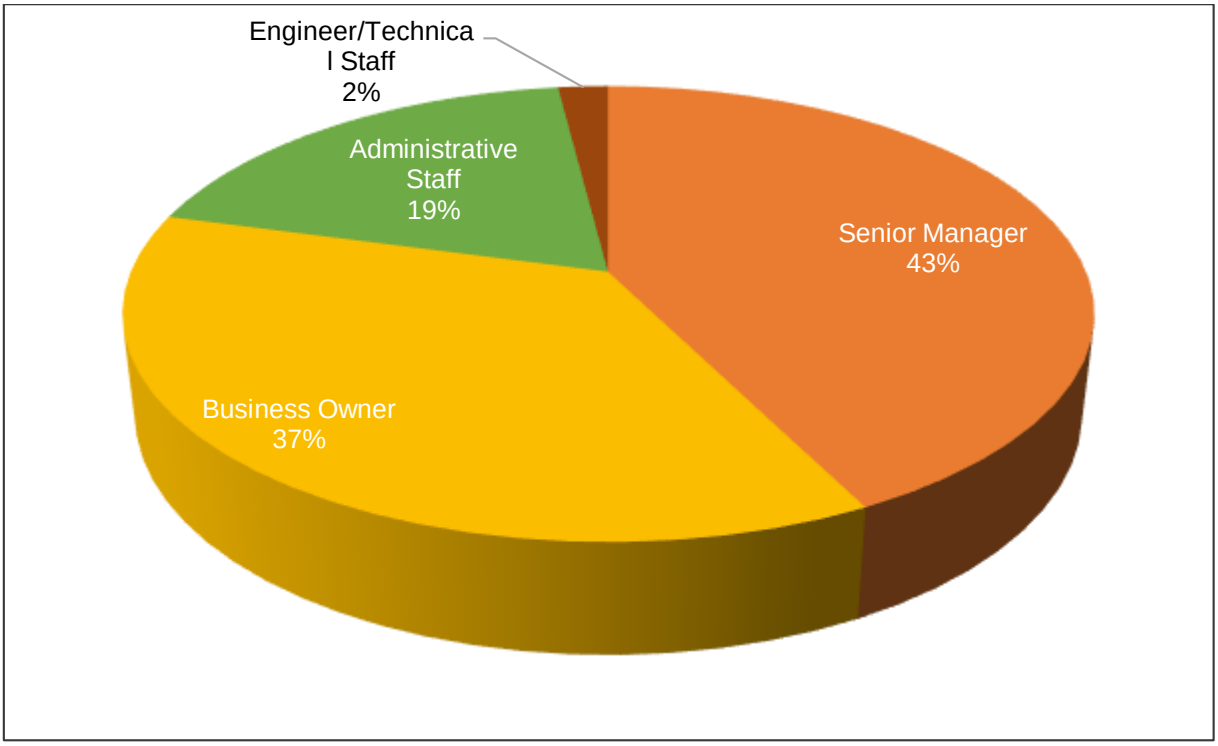
employment bridges emerged as key needs. In the simulation/AR-VR fields, the implementation of demand-driven tools such as "market creation through public procurement" and the communication of multi-year demand signals to local developers are considered among the levers that will make Ankara's competitive advantage permanent.

Feasible steps from the perspective of Ankara's Investment and Promotion Strategy include strengthening simulation/game-focused cluster governance, facilitating access to shared testing/accreditation infrastructure, designing scalable financing corridors (grants-co-financing-purchase commitment), launching targeted promotion programs that will increase access to role model showcases and international networks, and defining measurable indicators for monitoring and evaluation. The proposed indicators are productization time, number of products released, export/turnover share, number of R&D projects, and public procurement volume.

4.2. Survey Results

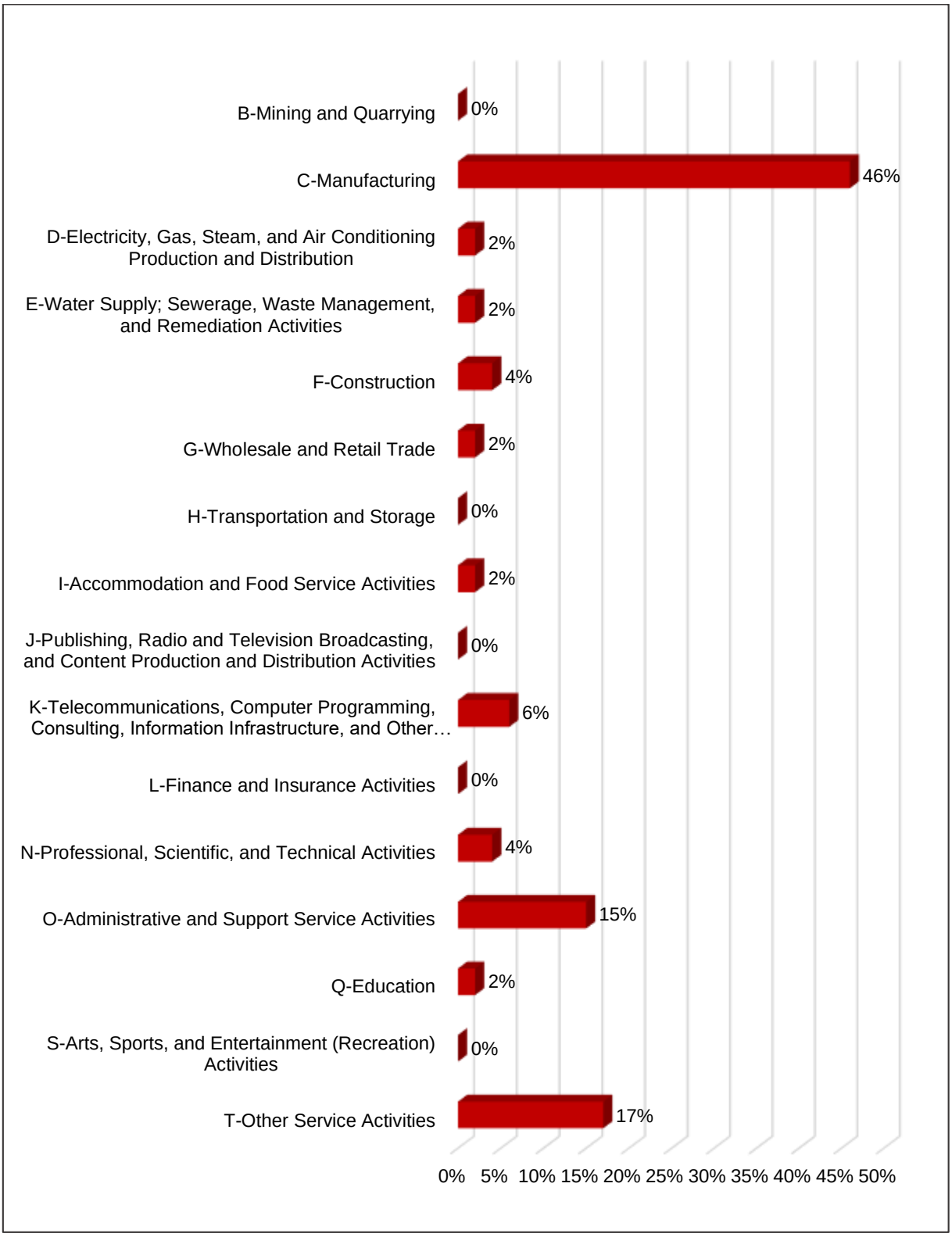
Within the scope of the Ankara Provincial Investment and Promotion Strategy, a comprehensive survey was conducted to reveal the current status, priority issues, and areas of need regarding the province's industrial and investment ecosystem. A total of 54 stakeholders participated in the study; a diverse group of participants, including industry representatives, business owners, administrative staff, and technical experts, contributed to the process. The findings obtained reflect the different perspectives of the stakeholders and have become a valuable source of data for the preparation of the strategy.

Figure 35: Title/Position of Survey Respondents



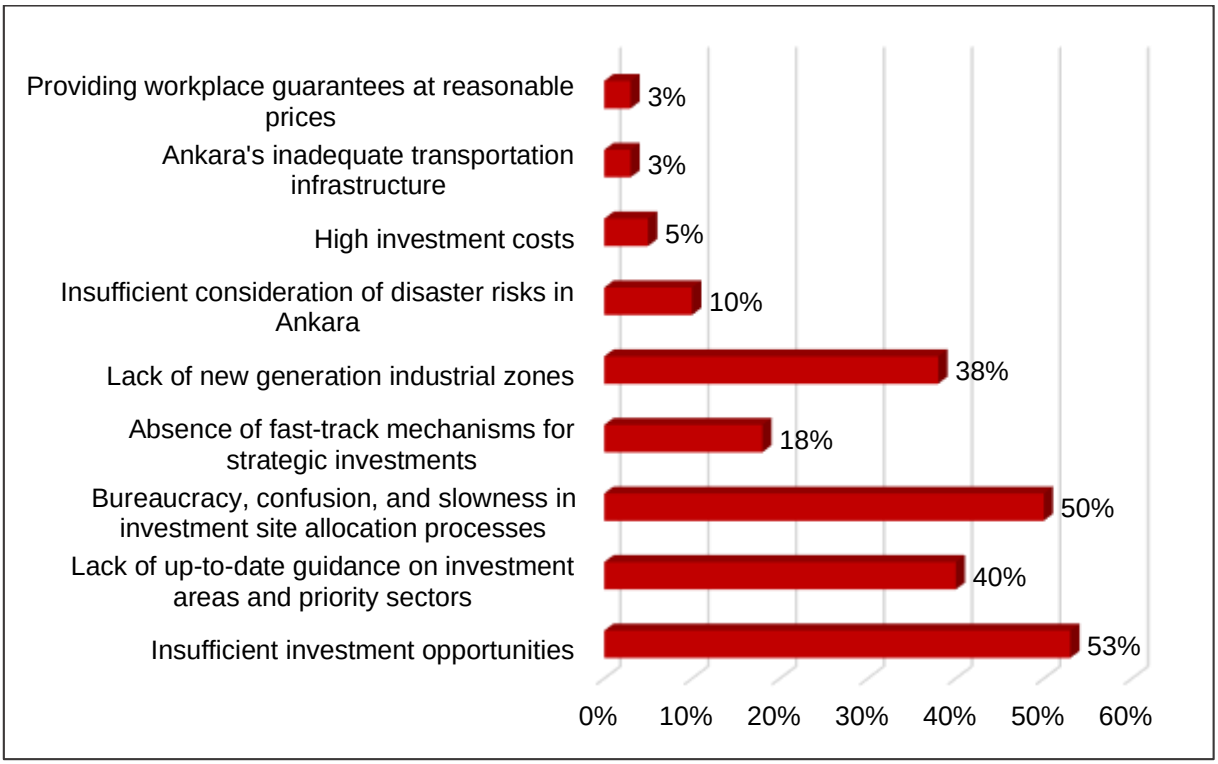
43% of survey participants were senior managers, 37% were workplace owners, 19% were administrative staff, and 2% were engineers/technical staff. The fact that the majority of participants held decision-making positions indicates that the data obtained strongly reflects strategic-level priorities and needs.

Figure 36: Sector of Activity of the Respondent's Organization



The sectoral distribution of participants reveals that manufacturing activities are strongly represented in Ankara's investment ecosystem. While manufacturing stands out with a share of nearly half, there has also been significant participation in administrative and support services and information technology-telecommunications. Representation in other sectors is more limited. The analysis shows that the areas prioritized in the strategy study were shaped primarily by views from specific sub-sectors of industry and services.

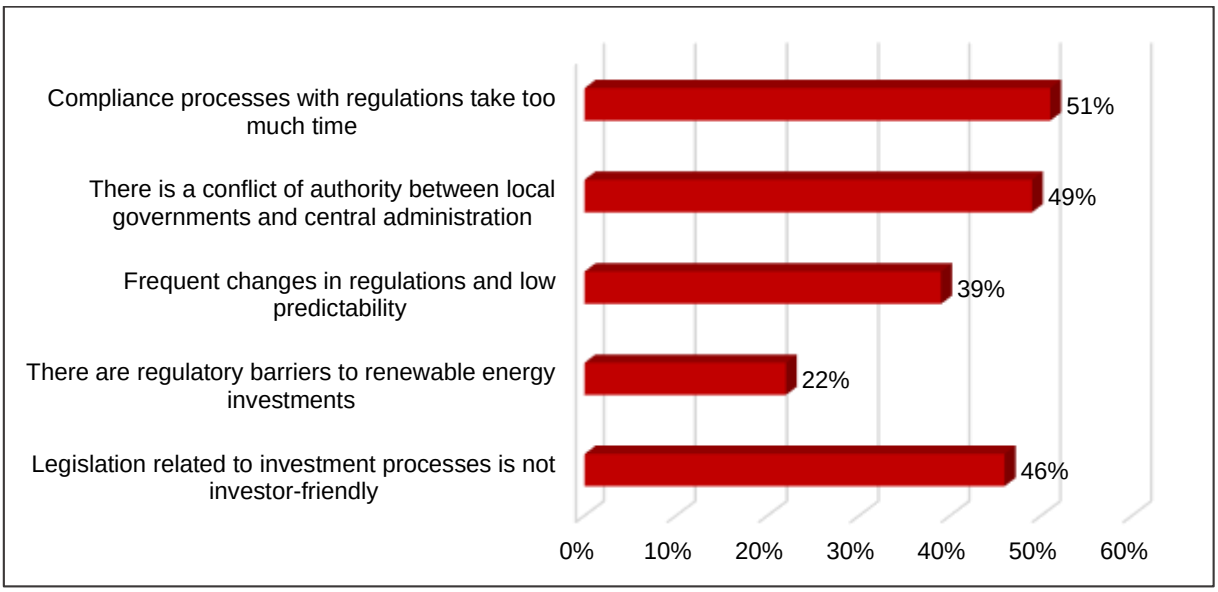
Figure 37: Most Significant Challenges Regarding Investment Site Selection



According to the graph, the issue that participants pay the most attention to regarding investment location is the lack of suitable investment areas. This is followed by bureaucratic complexity and slowness in the investment location allocation processes. The lack of up-to-date guidance on investment areas and the need for a new generation of industrial zones are also among the other prominent issues. Issues such as costs, disaster risks, and transportation, which were mentioned at lower rates, were considered secondary challenges.

The results reveal that in order to strengthen the investment environment in Ankara, it is necessary to diversify investment areas, reduce bureaucracy in the allocation processes, and develop informative mechanisms for investors.

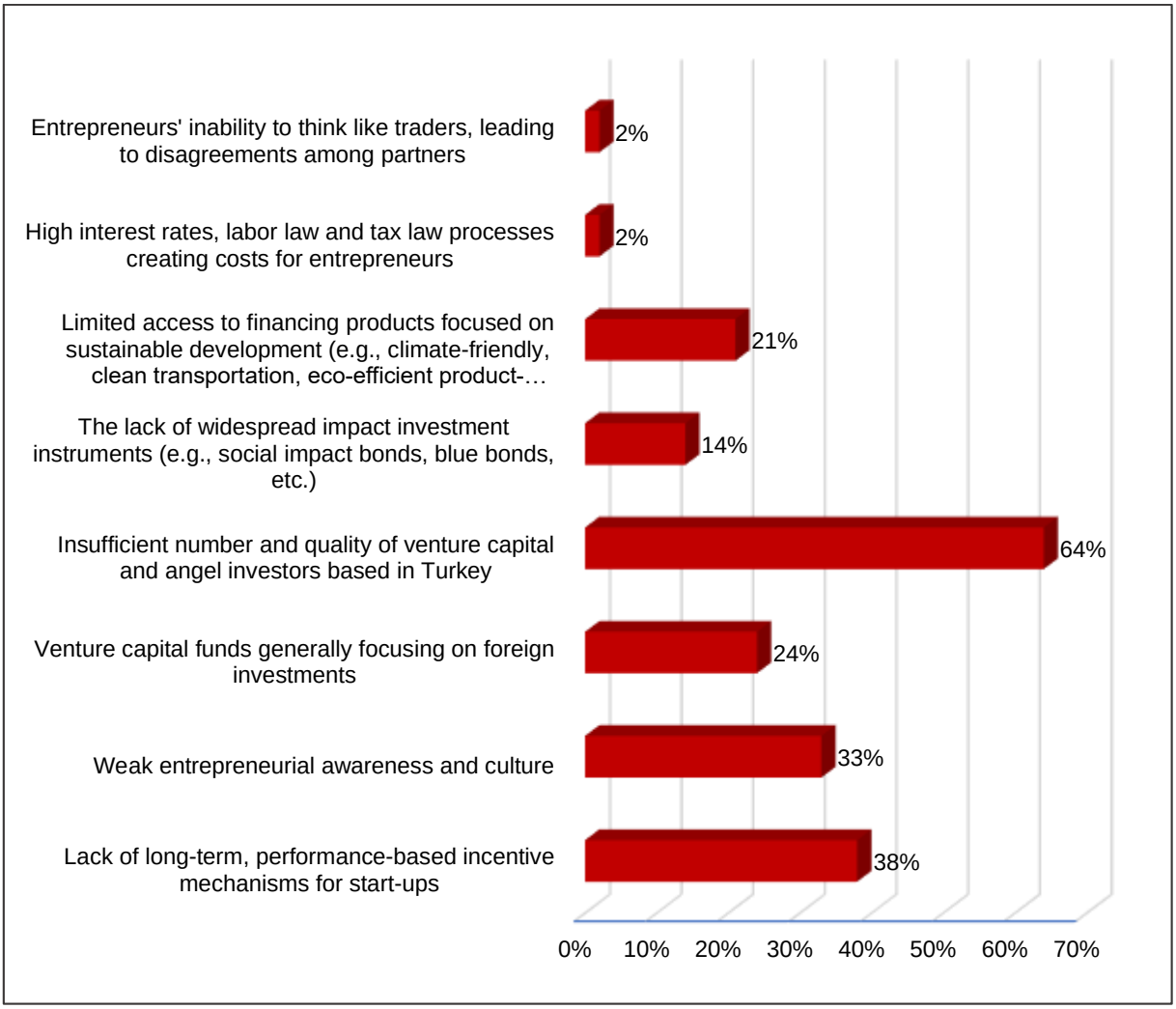
Figure 38: Regulatory Challenges Affecting Investment Decisions



As seen in the graph, the most significant challenge related to legislation for participants is the excessive time required for compliance processes. This is followed by the confusion of authority between local administrations and central government and the lack of investor-friendly legislation regarding investment processes. Furthermore, frequent changes in regulations and low predictability are other noteworthy factors. Regulatory barriers to renewable energy investments were mentioned at a relatively lower level.

The picture that emerges shows that, in order to improve the investment environment, it is particularly necessary to accelerate regulatory processes, strengthen administrative coordination, and implement investor-friendly legal regulations. Furthermore, making regulations more predictable and stable is critical for enabling investment decisions to be made with confidence.

Figure 39: Main Financing Problems Faced by Entrepreneurs and Startups



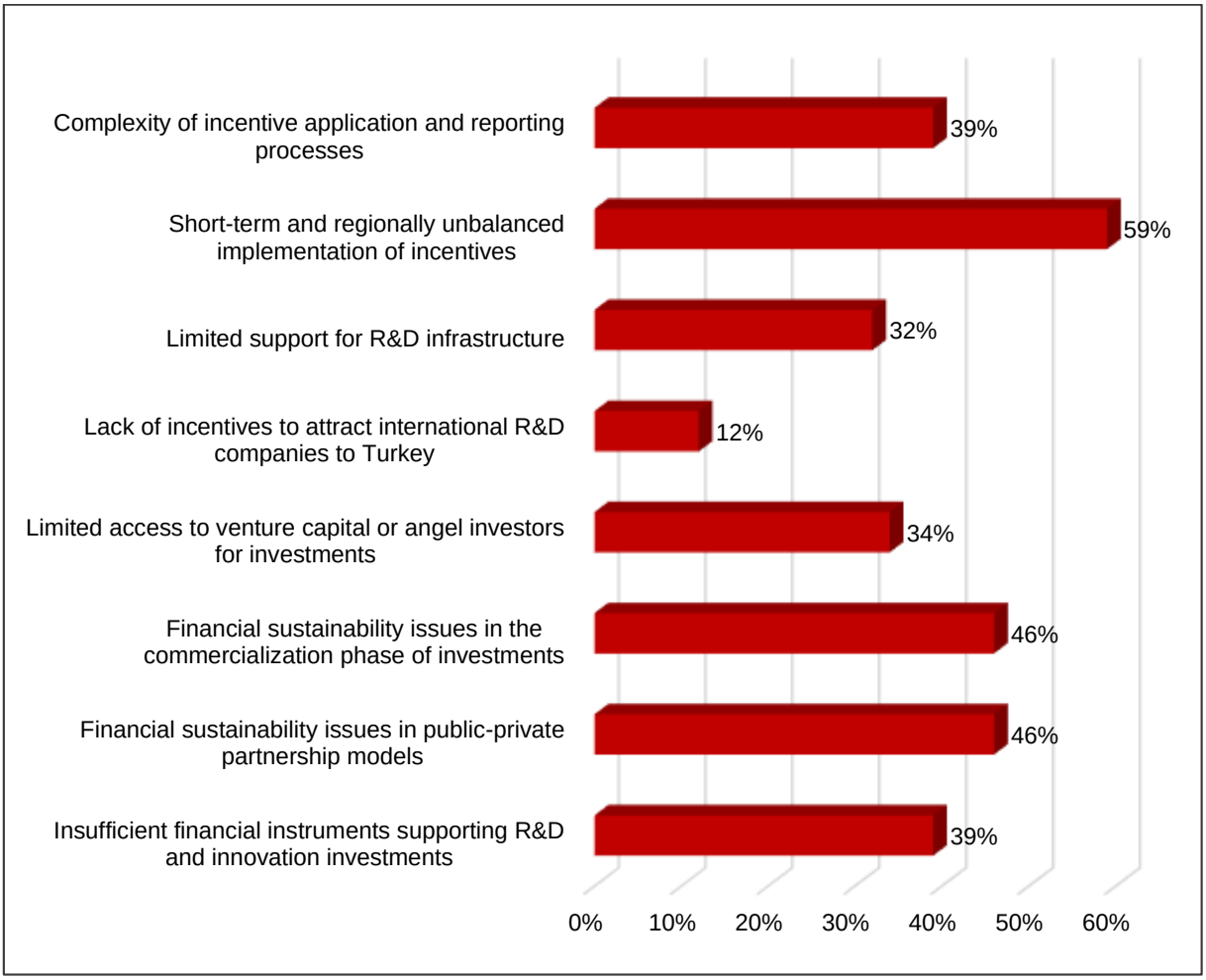
Hata! Başvuru kaynağı bulunamadı. , the most critical obstacle to entrepreneurs and start-ups a ccessing finance is the insufficient capacity of domestic venture capital and angel investors. Findings indicate that early-stage financing sources required for scaling innovative ventures remain limited.

On the other hand, the lack of long-term and performance-based incentive mechanisms has been identified as another factor hindering sustainable growth in the entrepreneurship ecosystem. Furthermore, the weak awareness and culture of entrepreneurship is also a factor that exacerbates problems in accessing finance.

A smaller segment of participants raised issues such as venture capital funds turning to foreign markets, limited access to sustainable development-oriented financing products, and the lack of widespread impact investing.

It is evident that in order to strengthen Ankara's entrepreneurial ecosystem, it is necessary to expand the local capital pool, design long-term incentives, and promote education, mentoring, and awareness programs that support entrepreneurial culture.

Figure 40: Financing and Incentive Issues Faced by Investors

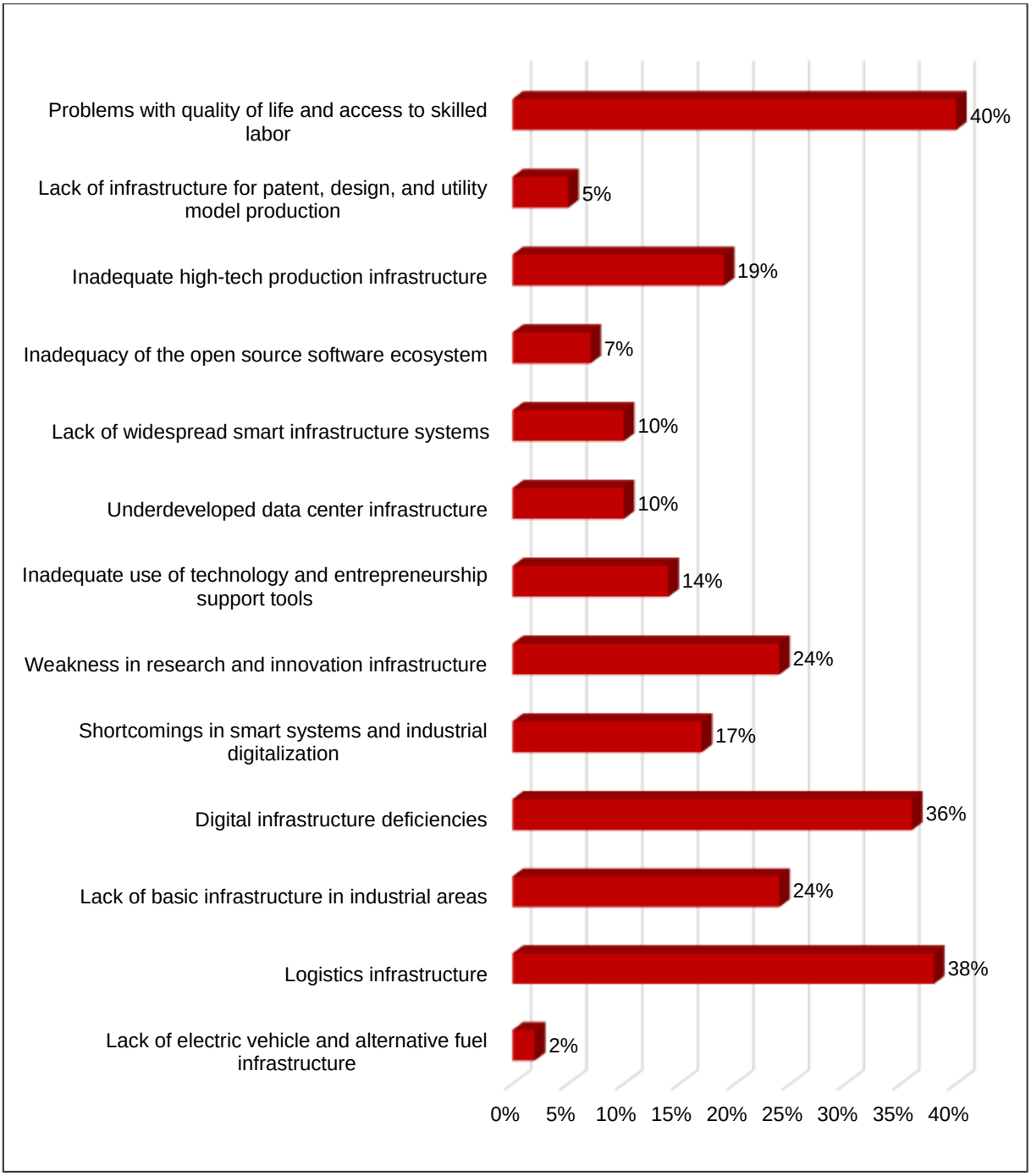


Hata! Başvuru kaynağı bulunamadı. sheds light on the issues investors find most challenging in f inancing and incentive mechanisms. The most frequently mentioned issue is the short-term and regionally uneven application of incentives. Participants stated that this situation complicates long-term investment planning and creates regional development inequalities.

In addition, financial sustainability issues encountered during the commercialization phase of investments and the failure to ensure financial sustainability in public-private partnership models are among the other prominent obstacles. Furthermore, the complexity of incentive application and reporting processes and the inadequacy of financial instruments supporting R&D and innovation investments have been highlighted as significant problem areas. Issues mentioned to a lesser extent include the limited support for R&D infrastructure, investors' access constraints to venture capital, and the lack of incentives to attract international R&D companies to Turkey.

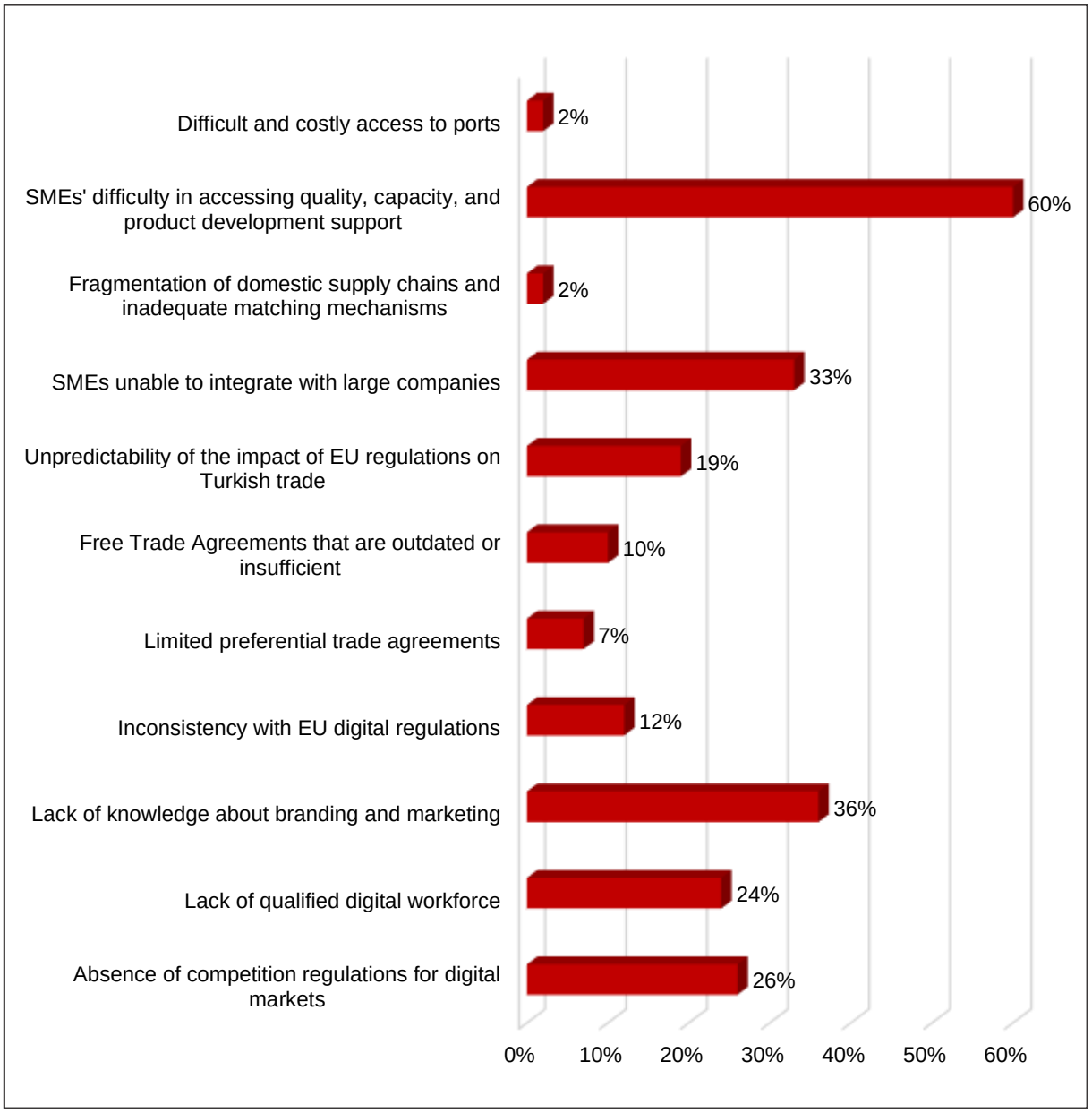
It is understood that in order to strengthen the investment environment in Ankara, incentives need to be designed in a long-term, inclusive, and predictable manner, sustainable financing models need to be developed, and tools supporting innovation-focused investments need to be diversified.

Figure 41: Most Significant Infrastructure and Technological Deficiencies



From the participants' perspective, the most prominent issue among infrastructure and technological deficiencies was the difficulty in accessing qualified labor. In addition, deficiencies in logistics infrastructure and inadequate digital infrastructure were cited as other significant areas limiting the investment environment. More technical topics—such as data center infrastructure, smart systems, or high-tech production capacity—were mentioned to a lesser extent, indicating that priorities are focused on basic infrastructure and human resources.

Figure 42: Key Challenges Related to Competitiveness, Compliance, and SMEs

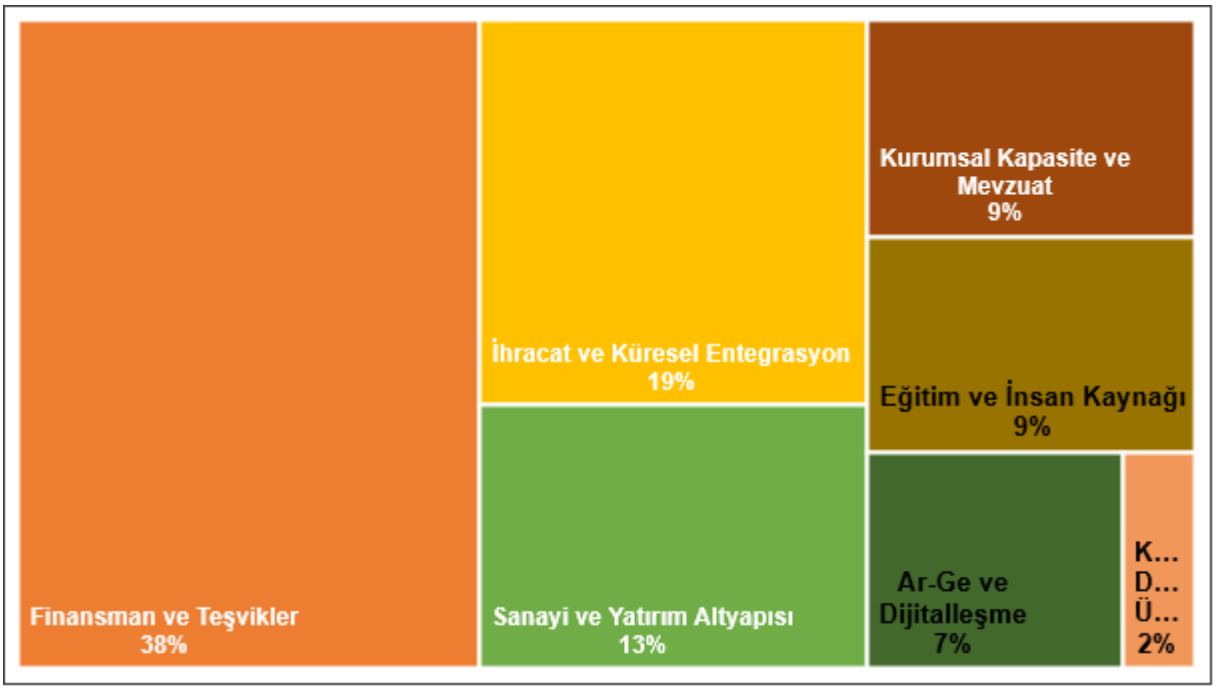


The most prominent problem faced by SMEs is the difficulty in accessing quality, capacity, and product development support. This situation prevents companies from developing innovative solutions in their production processes and becoming competitive in international markets. Lack of knowledge in branding and marketing makes it difficult to establish a permanent presence in foreign markets, while the limited supply of skilled labor is also a structural obstacle that reduces productivity.

In addition, the difficulties SMEs experience in integrating with large companies limit their positioning within value chains. The unpredictability of the impact of EU regulations on trade and the inadequacy of current free trade agreements create uncertainty in the context of foreign trade. Although mentioned to a lesser extent, the costs associated with port access and the limitations of supply chain mechanisms are also among the factors that weaken competitiveness.

SMEs in Ankara need both easier access to institutional support mechanisms and the development of human resources and marketing capacity for sustainable growth and global integration.

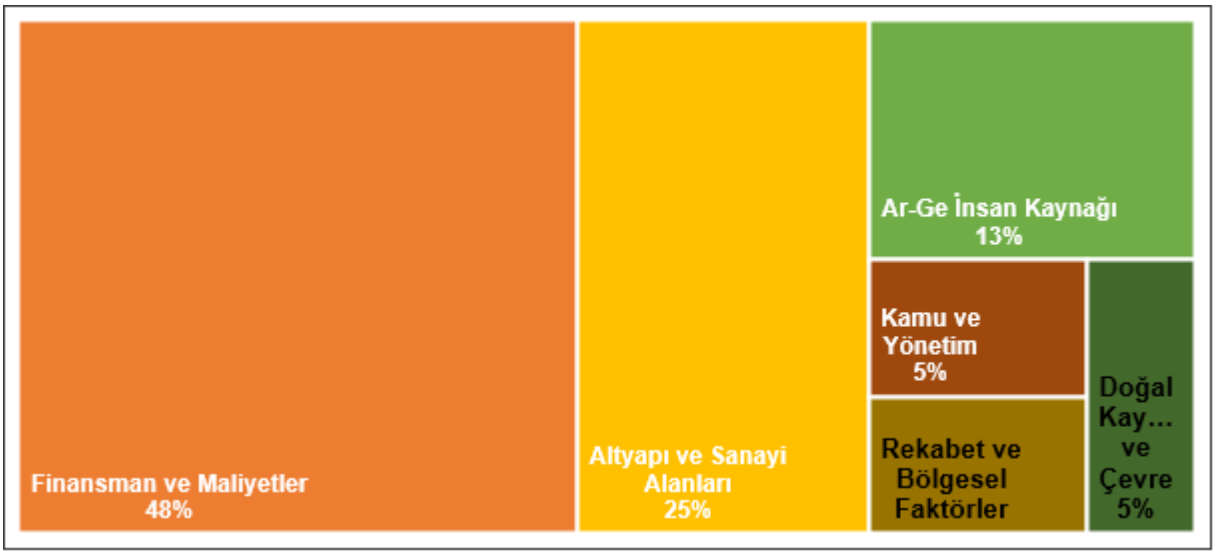
Figure 43: Areas Where Investors Most Need Support



Financing and costs are the most prominent risks affecting the investment environment in Ankara. The high rate indicates that capital access and cost management are the most critical factors in investment decisions. The adequacy of infrastructure and industrial areas ranks second, pointing to areas requiring priority investment in the city's production capacity and spatial development. Limitations in access to R&D and qualified human resources constitute a significant constraint for innovation and technology-based investments.

Public and administrative issues, competitive conditions, and natural resources/environmental factors, expressed at lower rates, are also risks that should not be overlooked. Although mentioned to a more limited extent, problems in these areas have the potential to directly affect the investment environment.

Figure 44: Most Significant Local and National Risks Affecting the Investment Climate in Ankara



When examining the local and national level risks affecting the investment environment in Ankara, financing and cost factors stand out as the most critical challenge area at 48%. The difficulties investors face in terms of capital access, input costs, and financial sustainability limit the confidence with which investment decisions can be made. Infrastructure and industrial areas (25%), which rank second, reveal

the inadequacy of spatial and physical conditions in the process of expanding the city's production capacity and attracting new investments.

R&D and human resource deficiencies (13%) represent a risk area that must be prioritized in Ankara's technology-based growth and high value-added production goals. Public and administrative issues (5%), competition and regional factors (5%), and natural resources and the environment (5%), expressed in more limited proportions, have indirect but significant effects on the investment environment.

It has been revealed that the priority areas for intervention to strengthen the investment environment in Ankara are shaped around access to finance, cost management, industrial infrastructure development, and increasing the capacity of qualified human resources.

Figure 45: Most Significant International Risks Affecting the Investment Climate

When examining the factors affecting the investment environment at the international level, perception management and the global trust issue come to the fore. The negative perceptions of international investors regarding risks in Turkey and global economic uncertainties are not only factors limiting capital inflows but also create a structural weakness that reduces predictability in long-term investment decisions.

In addition, shortcomings in market diversification and regulatory compliance create fragility in Ankara's export strategies. The proliferation of protectionist policies and high customs duties increases cost pressures, particularly in medium and high-tech sectors, while delays in adapting to global technology trends have the potential to push back Ankara's position in value chains.

Fluctuations in energy prices, political and economic instability in neighboring regions, and the obligations imposed by the green transition directly affect the competitiveness of businesses at the sectoral level. In this context, Ankara's priority should be not only to monitor external risks but also to

develop transparent regulations that will increase investor confidence, international compliance mechanisms, and policies that will accelerate adaptation to technology.

4.3. SWOT Analysis

STRENGTHS	WEAKNESSES
• The capital's position as a diplomatic, administrative, and decision-making center • Strategic logistical location in the center of Central Anatolia • Ankara's leading position in high-tech exports • Strong defense industry and space/dual-use technologies ecosystem • High concentration of universities and research infrastructure • Extensive healthcare infrastructure, large city hospitals, medical tourism, and medical device production capacity • Pool of qualified engineering, health, and social sciences graduates • Strong research infrastructure for advanced materials, artificial intelligence, biotechnology, and microchip investments • Ankara-based technoparks, industrial zones, and specialized industrial areas • Increasing number of high-tech ventures and a rapidly developing start-up ecosystem • Added-value production and AgriTech potential in agriculture and rural districts	• Limited international recognition and investment brand value • Capacity to attract direct foreign investment remains low compared to Istanbul and Izmir • Absence of a free zone • Weak transportation links at the airport (city center-Esenboğa) • Limited variety of long-haul direct international flights at Esenboğa • Insufficient logistics centers • Lack of a compelling story and brand to attract global investors to Ankara • Insufficient digitalization and green transformation capacity of SMEs • Limitations in quality of life and social appeal in attracting internationally qualified workforce • Bureaucratic processes still perceived as lengthy and complex from an investor's perspective • Limited implementation of energy efficiency and environmental sustainability practices in industry • Insufficient sports complexes • Ankara's lack of a clear "story" and theme of appeal for global investors • The significant development gap between the city center and rural districts
OPPORTUNITIES	**THREATS**
• International technology funds, green transition financing, and EU Carbon Border Adjustment Mechanism processes • Turkey's strategic position with the diversification of global supply chains • Rising demand in the health tourism and elderly care sectors • High interest among young entrepreneurs in the software, gaming, and digital content sectors and investment opportunities in creative industries • Ankara's integration into the Silk Road/Middle Corridor projects in logistics • Expansion of investment networks through the Organization of Turkic States and regional cooperation • Adaptation of technologies developed in the defense industry to civilian areas • Collaborations with international universities and the potential for foreign students • Attracting qualified talent with a high quality of life • Increased interest in thematic fairs, congresses, and summits • The opportunity to become a center of attraction for international defense/space fairs and summits • Gordion's inclusion in the UNESCO World Heritage List • Ankara's selection as the 2026 Turkish World Tourism Capital	• Global recession, high interest rates, fluctuations in capital movements, and declining investor confidence • Regional geopolitical tensions (creating uncertainty in the investment environment) • Middle Eastern and Eastern European countries challenging Ankara in the investment race with their low-cost advantage • Fluctuations in energy prices and energy supply security risks • Infrastructure (transportation, housing, digital) capacity pressures • Istanbul maintaining its dominant position as a center of attraction for international investors • Rapidly increasing global competition in high-tech sectors • Risk of lagging behind in adapting to green transformation and carbon regulations • Brain drain and loss of skilled labor • Lack of predictability in bureaucratic and legal processes in the eyes of investors • The continuing mismatch between vocational education and industrial needs • Climate change threats (drought, heat islands, reservoir fluctuations) • Shrinking of agricultural areas due to urbanization pressure • Risk of falling behind in the global race for patents, licenses, and intellectual property in high-tech investments • Digital security vulnerabilities and cyberattacks

5. CHALLENGES ENCOUNTERED IN THE INVESTMENT AND PROMOTION PROCESS

Today's global investment environment has become more complex due to increased competition, accelerating technological transformation, and sustainability pressures. Countries and cities are striving to attract investors not only through traditional investment incentives but also through the quality of the business environment, the reliability of infrastructure, and living standards. International experience shows that success in attracting direct investment is based not only on economic indicators but also on comprehensive, long-term, and confidence-inspiring policies. Investors want to see predictable regulations, a secure business environment, strong infrastructure, a skilled workforce, and a sustainability perspective all together.

Countries that stand out on a global scale generally build their investment attraction strategies around three axes: effective promotion and marketing mechanisms, and access to a highly skilled workforce. Ireland has become the European hub for technology companies by combining tax advantages with a strong skilled workforce. Singapore, meanwhile, has risen to become a regional financial and technology hub by offering a combination of its geographical location, advanced logistics infrastructure, and investor-friendly legal framework.

European countries are increasingly prioritizing green and digital transformation in their investment attraction policies. The European Union's Green Deal goals serve as an anchor not only for environmental protection but also for determining investor orientation. Many countries are integrating energy efficiency, renewable energy investments, and circular economy practices into their incentive systems. For investors, this approach means protection from future regulatory risks. Competition in the Asia-Pacific region is increasingly based on logistical advantages, free trade agreements, and innovation-focused ecosystems. China and India continue to attract investors with their large-scale markets and production capacities, while South Korea and Japan highlight their innovation and R&D infrastructure in high-tech investments. Countries such as Vietnam and Malaysia are strengthening their position in global value chains by supporting their low-cost advantages with developing logistics networks.

North America stands out in attracting investors with its strong legal framework, deep capital markets, and entrepreneurial ecosystem. The US, particularly exemplified by Silicon Valley, attracts not only foreign capital but also qualified human resources by offering university-industry collaboration, venture capital funds, and an entrepreneurial culture. Canada stands out with its stable economic environment, immigrant-friendly policies, and support for green energy investments. In the Middle East, the United Arab Emirates and Saudi Arabia, in particular, have developed large-scale investment attraction programs in finance, tourism, logistics, and technology with the aim of diversifying their energy revenues. Dubai's free zones and Riyadh's new generation city projects have become centers of attraction, offering investors both tax advantages and high living standards.

Turkey's investment environment attracts attention with its large-scale market potential, strategic geographical location, and developing industrial infrastructure. Some structural difficulties encountered in the investment process complicate decision-making. In particular, the availability of industrial land, limitations in transportation and logistics infrastructure, imbalances in the supply of qualified human resources, and the lack of sufficiently attractive incentive systems at the local level are critical factors determining investors' location choices and the scale of their investments. The consistent and effective implementation of policies applied across Turkey at the local level is considered a factor that increases investor confidence. Although the issues affecting investment decisions arise at the national or international level, it is of great importance to respond to them with solution mechanisms and strategies developed at the local level. Proactive measures taken at the city level will reduce uncertainties in the investment environment and give confidence to investors. Strengthening physical infrastructure, increasing human resource capacity, activating sectoral clusters, and institutionalizing promotional activities through the cooperation of local governments and regional development actors will further increase Ankara's investment attractiveness.

Table 71: Challenges for Investors and Entrepreneurs Specific to Ankara

Challenge Area	Specific Challenge (Ankara-Specific)	Impact on Investment Decision
Physical and Infrastructure	Limited land supply in industrial zones; insufficient qualified industrial areas for technology-intensive investments	Difficulty in securing industrial space, risk of time loss and cost increase for investors
	Despite the central location advantage in land and air transportation, distance from seaports; limited rail transportation	Transportation and logistics bottlenecks, resulting in operational inefficiency and competitive disadvantage for investors
	High energy costs, inadequate water/waste infrastructure in some areas, limited fiber internet and data centers	Infrastructure deficiencies, loss of sustainability and long-term confidence for investors
Human Resources and Education	Despite the strength of universities in Ankara, there is a shortage of intermediate and technical personnel demanded by industry	Lack of qualified human resources, uncertainty for investors regarding production quality and sustainability
	Vocational education institutions' programs are not compatible with new generation technologies	Inadequate vocational education infrastructure, resulting in time loss and additional costs for investors in finding labor
	Emerging awareness of green transformation; limited qualified workforce in energy efficiency and environmental management	Limited preparation for "green collar" employment, posing a risk for investors in terms of compliance with international standards
Institutional and Political	The low attractiveness of Ankara-specific local incentives; national incentives are generally more advantageous in other regions	Limitations of the incentive system, loss of appeal for investors and search for alternative locations
	Despite the existence of clusters such as defense, health, and information technology, horizontal cooperation remains weak	Clustering and sectoral cooperation issues, loss of economies of scale and innovation capacity for investors
	The lack of continuity in university-industry-public cooperation platforms	Weak cooperation mechanisms, loss of trust for investors, and uncertainty in long-term partnerships
	The inability to translate national strategies into Ankara-specific applications	Limited localization initiatives, risk of investors being deprived of local adaptation and practical solutions
Innovation, Entrepreneurship, and Marketing	Low commercialization rate of prototypes emerging from R&D centers and technology parks	Failure to commercialize R&D outputs, uncertainty for investors regarding the capacity of innovations to create economic value
	Weak branding and promotion of local companies in opening up to international markets	Branding and marketing deficiencies, loss of international competitiveness for investors

	Although the entrepreneurial ecosystem in Ankara is vibrant, the risk-taking culture is low and access to capital is limited	Low awareness of entrepreneurship, posing a risk of sustainability and scalability for investors in innovative ventures

Physical and Infrastructure Challenges

One of the most fundamental factors directly affecting the investment process in Ankara is the accessibility and diversity of industrial areas. Although the city has a certain capacity in terms of organized industrial zones, there are sometimes difficulties in supplying the qualified land demanded by investors. It is particularly difficult to find land with the necessary qualities for technology-intensive, high value-added, or environmentally sensitive production facilities. The difficulty in securing industrial land increases the risk of time and cost losses for investors.

Another important bottleneck for investors in the city is its transportation and logistics capacity. Although Ankara has a strong central location in terms of road and air transportation, its limited access to maritime transportation in international trade is a significant disadvantage. Furthermore, congestion on the existing road network and the limited effectiveness of rail transport increase costs and hinder continuity in the flow of raw materials and finished products for investors. The lack of sufficient integration among logistics centers further exacerbates this situation. Bottlenecks in transportation and logistics result in operational efficiency losses and competitive disadvantages for investors.

The adequacy of infrastructure services is another decisive factor in investors' decisions. Energy supply security, water resource management, waste disposal systems, and the prevalence of digital infrastructure are critical elements in terms of investment sustainability. In Ankara, particularly in some industrial zones, high energy costs, inadequate infrastructure investments, and lack of compliance with environmental standards shape investors' long-term plans. In today's rapidly digitalizing world, the inadequacy of fiber internet, data centers, and smart infrastructure solutions are also among the factors limiting Ankara's investment appeal. Infrastructure deficiencies create a loss of confidence for investors in terms of sustainability and competitiveness.

Human Resources and Education Challenges

Although Ankara has significant human capital potential thanks to its strong university infrastructure and well-established educational institutions, it experiences various imbalances in the supply of qualified labor that investors require. In particular, the mismatch between the technical skills demanded by industrial sectors and the outputs of educational institutions creates a gap in the labor market. This situation directly affects investors' expectations for productivity, quality, and long-term sustainability. The lack of qualified human resources creates uncertainty for investors regarding production quality and sustainability.

The vocational education infrastructure stands out as a critical challenge in terms of strengthening the investment environment in Ankara. The intermediate personnel profiles required by industry cannot be trained in sufficient numbers, and existing programs cannot be updated to be compatible with new generation technologies. These shortcomings pose a significant obstacle to meeting investor needs, particularly in technology-intensive sectors such as machinery, defense, healthcare, and information technology. The inadequacy of the vocational education infrastructure creates time loss and additional cost risks for investors in finding labor.

The green transformation process, which is gaining importance on a global scale, brings to the fore a new employment category defined as "green collar" in the labor market. Although awareness in this area has begun to increase in Ankara, the preparations of both educational institutions and industrial organizations have not reached a sufficient level. The supply of personnel with the necessary skills for

energy efficiency, carbon footprint reduction, and sustainable production processes is limited. The lack of preparation for "green collar" employment poses a risk for investors in terms of green transformation and compliance with international competition standards.

Institutional and Policy Challenges

One of the most important factors shaping investment decisions is the predictability of corporate regulations and the attractiveness of incentive mechanisms. Although investment incentives applied throughout Turkey offer certain advantages, it is observed that this system is not sufficiently flexible and sensitive to sectoral differences in Ankara . There is a need for stronger local incentives that meet the expectations of investors, particularly in strategic sectors such as high technology, healthcare, defense, and information technology. Limitations in the incentive system create a risk of loss of appeal for investors and a search for alternative locations.

Clustering and sectoral cooperation are critical in terms of economies of scale and innovation capacity for investments. Although there are certain examples of clustering in Ankara in the defense industry, health technologies, and information technology, these are not supported by horizontal cooperation mechanisms. The lack of cooperation leads investors to perceive limited potential benefits in processes such as joint R&D, testing infrastructure, or supply chain integration. Clustering and sectoral cooperation issues increase the risk of loss of scale advantage and innovation capacity for investors.

The weakness of cooperation mechanisms is another critical institutional challenge faced by investors. Institutional capacity has not yet reached the desired level in areas such as university-industry cooperation, public-private partnerships, and the active participation of local governments in investment processes. Consequently, it is difficult for investors to find a secure and long-term basis for cooperation in the local ecosystem. The weakness of cooperation mechanisms creates a risk of loss of confidence for investors and uncertainty in long-term cooperation.

Localization initiatives are another factor limiting Ankara's potential in the investment process. Many strategies and programs implemented at the national level cannot be sufficiently adapted locally, and unique solutions and applications cannot be developed at the city level. As a result, Ankara's human resources and academic expertise are not sufficiently valued in investment decisions. The limited nature of localization initiatives creates the risk of investors being deprived of local adaptation and practical solutions.

Innovation, Entrepreneurship and Marketing Challenges

Ankara has significant R&D and innovation capacity with its strong universities, research centers, and technology parks. Its national leadership in the defense industry and health technologies are among the factors that make the city stand out in the innovation ecosystem. However, serious challenges are encountered in the process of converting this potential into economic value. The commercialization, branding, and sustainable marketing of products resulting from R&D activities are not sufficiently robust. The increase in the number of patents and prototypes has not been matched by parallel success in converting them into economic value. Although investors view Ankara's innovation ecosystem as an "idea production center," they are hesitant about the commercialization process. The inability to commercialize R&D outputs creates uncertainty for investors regarding the capacity of innovations to generate economic value.

Shortcomings in branding and marketing also limit Ankara's attractiveness to investors. Most local startups struggle to develop brands that can withstand international competition. In particular, deficiencies are observed in the promotion of export-oriented products, their integration into global value chains, and the process of building corporate identity for brands. These shortcomings make it difficult for investors to consider Ankara as a high value-added production center. Branding and marketing deficiencies pose a risk of loss of international competitiveness for investors.

Although entrepreneurial awareness is gradually developing in the Ankara ecosystem, it has not yet reached a sufficient level. The weak risk-taking culture, problems accessing capital resources, and limited visibility of the entrepreneurial ecosystem make it difficult to implement new business ideas. Despite the high entrepreneurial potential, especially in Ankara with its large young population, the rate of conversion of this potential into concrete business ventures is low. Low entrepreneurial awareness creates risks for investors in terms of sustainability and scalability in innovative ventures.

6. ANKARA PROVINCIAL INVESTMENT AND PROMOTION STRATEGY

6.1. Vision

Ankara Provincial Investment and Promotion Strategy Vision:

Ankara, the global capital of investment and innovation, distinguished by its high quality of life and its sustainable and innovative structure

6.2. Strategic Focus Areas

The Ankara Provincial Investment and Promotion Strategy has been prepared with the aim of effectively evaluating the city's existing potential, supporting its future vision with concrete steps, and creating a development path in line with national policies. The focus areas identified within the strategy are designed to increase Ankara's economic competitiveness, establish a strong position in innovative sectors, ensure sustainable living conditions, and strengthen its international recognition.

The identified focus areas offer a comprehensive framework that encompasses not only the city's economic orientation but also social welfare, environmental sustainability, institutional capacity, and technological transformation. This approach aims to integrate Ankara's administrative and strategic role as a capital city with a globally innovative, production- and investment-focused urban identity.

Each focus area is supported by achievable, measurable, and concrete targets. These areas, which span a broad spectrum from defense and space technologies to the health ecosystem, logistics, and digital transformation, reflect Ankara's inclusive and long-term growth perspective, aligned with sustainable development principles. Within this framework, Ankara will strengthen its position as a "world capital" not only with its identity as the capital of Turkey, but also with its livability, innovation, production capacity, and international accessibility.

Figure 46: Focus Areas of the Ankara Provincial Investment and Promotion Strategy

Within the framework of the Ankara Provincial Investment and Promotion Strategy 2025-2028; Six focus areas have been identified: Liveable, Sustainable, and World Capital Ankara; Defense, Space, and Dual-Use Technologies; Digitalization, Innovation, and High-Tech Competitiveness; Logistics and International Accessibility; Human Resources and Social Development; and Health and Life Sciences Ecosystem.

Focus Area 1: A Livable, Sustainable, and Global Capital City – Ankara

Ankara's ability to become a global center of attraction is directly related not only to its economic size but also to the quality of life it offers, its environmental sustainability, and its cultural richness. This comprehensive vision, which strengthens the capital's identity, is supported by the improvement of urban infrastructure, increased international access opportunities, and the widespread adoption of smart city applications. Modern transportation systems and integrated logistics solutions both facilitate investor access to Ankara and enhance the competitiveness of industry.

Approaches to environmental sustainability and climate resilience ensure the city's long-term economic and social stability. Efficient use of water resources, encouragement of green transformation investments, and resilient urban planning practices make Ankara a city better prepared for climate change; at the same time, they highlight it as an environmentally conscious center of attraction for international investors.

The creative economy and cultural industries, combined with Ankara's historical heritage and the dynamism of its young population, are giving the city new economic and cultural momentum. The developing ecosystem in design, media, digital games, and creative content production not only strengthens cultural identity but also creates high value-added export potential. Increased international visibility in this area reinforces Ankara's brand value on a global scale.

The strengthening of investments in culture, tourism, and sports is turning the city into a regional hub. As Ankara develops modern tourism opportunities integrated with its historical heritage, it offers a wide range of new investment and promotion opportunities, from international conferences to cultural festivals, sports events to ecotourism routes. The development of the sports economy also stands out as a complementary element of this framework; with its sports infrastructure and organizational capacity, Ankara is progressing towards becoming a center both locally and globally.

Goal 1: Prepare Urban Infrastructure and Transportation Systems for Investment

Goal 2: Encourage Investments in Environmental Sustainability and Resource Management

Goal 3: Make Ankara a Center of Attraction for the Creative Economy and Cultural Industries

Goal 4: Strengthen Investments in Culture, Tourism, and Sports

Goal 5: Transform the Sports Economy and Sports Tourism into an Investment Area

Focus Area 2: Defense, Space and Dual-Use Technologies

The defense and space industry plays a decisive role in Ankara's economic structure, not only in terms of production capacity but also in terms of strategic security, advanced technology development, and integration into global value chains. As home to Turkey's largest defense industry companies, the city contributes to national security and reinforces its status as the capital of high-tech added value.

The primary goal of the focus area is to make Ankara's strong defense ecosystem more visible internationally, accelerate the production of new-generation technologies, and create a diversified growth model by transferring this knowledge base to the civilian economy.

Deepening the defense industry will gain sustainability not only through large-scale companies but also by including SMEs, subcontractors, and suppliers in the ecosystem. The certification, testing, and quality infrastructure to be established in Ankara will reinforce the reliability of this process, while R&D activities strengthened by international collaborations will enhance the city's global competitiveness. Ankara will position itself as a reliable production center in defense and aviation, becoming a hub for international investors and strategic partners.

Dual-use technologies will enable the horizontal expansion of the economy by transferring Ankara's defense-focused expertise to civilian areas. The application of imaging, sensor, artificial intelligence, and robotics-based systems in fields such as healthcare, agriculture, energy, or disaster management will diversify the city's technological capacity and increase its export potential. Supported by branding, certification, and commercial diplomacy activities in international markets, this approach will position Ankara not only as a center for defense but also as a hub for developing multi-sector technology solutions.

Another dimension of the focus area is strengthening the innovation ecosystem. Research infrastructures to be established through universities, technoparks, and R&D centers will create new opportunities in critical technologies such as artificial intelligence, quantum, unmanned systems, and advanced materials. Human resources, supported by training programs, skills maps, and accelerated competency development mechanisms, will fuel Ankara's long-term competitiveness. Thus, the city will have the opportunity to position itself as a high value-added actor in global value chains, in addition to increasing national capacity in defense and space technologies.

Goal 6: Strengthening Global Competitiveness in the Defense and Space Industry

Goal 7: Promoting the Commercialization of Dual-Use Technologies

Goal 8: Strengthening the Innovation Ecosystem in the Defense and Space Industry

Focus Area 3: Digitalization, Innovation, and High-Technology-Based Competitiveness

One of the fundamental pillars of increasing Ankara's competitiveness at the national and international levels is strengthening an economic structure focused on digitalization and high technology. Thanks to the city's well-established universities, technology parks, and R&D centers, a strong knowledge production infrastructure already exists. Transforming this infrastructure into high value-added production and innovative business models will make Ankara not only an industrial center but also a capital of technology and innovation.

The development of R&D and design infrastructure, along with the strengthening of testing and certification processes, will accelerate the entire value chain from production to commercialization. Ankara will assume a more visible and effective role in strategic sectors such as electronics, software, biotechnology, and advanced materials.

Integration into the global entrepreneurship ecosystem is also one of the critical components of this focus area. Ankara's entrepreneurial environment has the potential to develop rapidly thanks to access to funding channels, participation in international networks, and start-up-industry cooperation mechanisms. With entrepreneurship summits, global acceleration programs, and creative collaboration platforms that will attract the interest of international investors, Ankara will progress towards becoming the center of entrepreneurship not only in Turkey but also in the region, strengthening the city's entrepreneurial culture while accelerating the emergence of new generation business models.

Twin transformation (green and digital) applications in industry will increase efficiency, sustainability, and compliance with international standards in Ankara's production structure. Thanks to energy efficiency, carbon footprint management, the integration of smart production technologies, and the establishment

of digital transformation centers, Ankara's industry will be able to integrate more easily into global value chains. At the same time, will facilitate the city's compliance with the European Green Deal and similar international norms, increasing investor confidence.

High-tech clusters and specialization strategies will make Ankara's competitive advantages permanent. The specialization of centers such as OSTİM, İvedik, ASO 1st OSB, and Başkent OSB, the establishment of sectoral R&D and innovation centers, and their support with international funds will transform Ankara into a regional high-tech hub. Human resource investments will also play a critical role in this process. Specialized programs to be launched at universities, the strengthening of vocational training infrastructure, and talent development academies to be established in technoparks will make Ankara a magnet for qualified labor.

The digital economy and creative content ecosystem stand out as complementary elements that will increase Ankara's global recognition. Supporting software developer platforms, game and media studios, and digital content investments will accelerate the city's integration with international creative economies. With proper planning, Ankara can strengthen its position as a regional center not only in technology production but also in digital culture, media, and creative industries.

Goal 9: Strengthening Ankara's Innovation and R&D Capacity

Goal 10: Integrating the Entrepreneurship Ecosystem into Global Funding and Collaboration Networks

Goal 11: Promoting Green and Digital Transformation

Goal 12: Transform Ankara into a Regional High-Tech Hub

Goal 13: Attracting Investments in the Digital Economy and Creative Content

Focus Area 4: Logistics and International Connectivity

Strengthening Ankara's logistics capacity plays a critical role in its economic and strategic development. The advantages of being the capital, its location at the intersection of road and rail lines, and its advanced aviation infrastructure make Ankara a candidate for becoming a national and international logistics hub. Increasing air transport capacity, developing rail and road integration, and promoting green logistics practices will facilitate the city's outward expansion and support competitiveness in industrial production. Thus, Ankara will play a more effective role not only in domestic connections but also in global supply chains.

The goal of becoming a regional logistics hub directly strengthens Ankara's potential to attract international investments. Thanks to the logistics free zone, cluster projects, and international fair integrations, Ankara can become an attractive center for investors. The studies will also contribute to the city becoming a global center of attraction in both commercial and cultural terms by integrating exhibition, congress, and fair areas into the logistics strategy.

Diversifying foreign trade connections will increase Ankara's export capacity and ensure that high value-added products reach global markets more effectively. Supporting e-commerce logistics, digital customs applications, and developing fast delivery infrastructure will accelerate the city's integration into the new generation trade ecosystem. Furthermore, Ankara's integration into the Silk Road corridor and global logistics projects will further increase the city's geostrategic importance.

The transformation of urban micro-logistics is a factor that will directly affect both sustainable transportation and quality of life. Thanks to electric distribution vehicles, cargo bikes, and micro-hub applications, urban logistics will become more environmentally friendly, efficient, and cost-effective.

Smart and resilient logistics solutions will ensure the city's supply security in the event of disasters and crises, making Ankara a more reliable and attractive center for both investors and the local population.

Goal 14: Strengthening Ankara's International Transportation and Logistics Infrastructure

Goal 15: To Transform Ankara into a Regional Logistics Hub

Goal 16: Diversify Ankara's Foreign Trade and Logistics Connections

Goal 17: Railway–Port Integration and Urban Micro-Logistics Transformation

Focus Area 5: Human Capital and Social Development

Qualified human resources are one of the most critical inputs for Ankara's sustainable growth goals, as well as for industry and high-tech sectors. Strengthening vocational training infrastructure in both urban centers and rural areas, and expanding curricula based on digitalization and green transformation are fundamental steps that will improve the quality of employment.

Supporting the participation of women and young people in production will both increase social inclusion and bring dynamism to the labor market. Ankara has the capacity to build a human resource ecosystem that emphasizes not only technical skills but also social cohesion and equal opportunities.

The rapid development of high-tech sectors increases the need for a workforce that is ready for employment. Many tools, from talent academies to accelerated vocational programs, housing and social support packages to attracting international talent, stand out as elements that will strengthen Ankara's competitive advantage. Thus, investors will encounter not only physical infrastructure but also a competent and constantly renewing labor pool.

Rural development holds a special place in Ankara's holistic development vision. The widespread adoption of smart technologies in agriculture, the establishment of thematic production zones, and the development of data-driven agricultural business models will provide income diversity and production efficiency in rural areas. These efforts will increase the livability of rural areas, reduce migration pressure, and create a more balanced regional development environment for investors.

The social development and inclusive urbanization dimension will transform Ankara into not only an industrial and technological city but also a metropolis with a high quality of life. Diversifying social amenities, strengthening the culture of volunteerism, and supporting the social entrepreneurship ecosystem will increase social solidarity while also creating new areas for investment. By treating social development as a complementary element of economic development, Ankara has the potential to present a strong example of a sustainable development model.

Goal 18: Increase Qualified Human Resources and Vocational Training Capacity

Goal 19: Create a Rapid Talent Pipeline for High Technology

Goal 20: Strengthen the Livability and Production Capacity of Rural Areas

Goal 21: Support Social Development and Inclusive Urbanization

Focus Area 6: Health and Life Sciences Ecosystem

Ankara is one of Turkey's leading centers in health and life sciences, with its well-established universities, advanced hospital infrastructure, and rapidly growing medical technology startups. The adoption of localization policies in pharmaceutical and medical device production contributes to reducing external dependency while also creating new opportunities of strategic importance for investors. Healthcare occupies a privileged position in Ankara's regional development vision due to its high added value, export potential, and creation of advanced technology-based employment.

Health tourism enables Ankara to become an international center of attraction with its high-quality healthcare services. The combination of thermal resources, modern clinics, and cultural heritage enhances the city's competitive advantage. The service infrastructure, supported by digitalization and smart healthcare applications, will not only enhance the patient experience but also modernize elderly and disabled care services.

Strengthening the research and collaboration infrastructure is another factor that will make Ankara more integrated with the global health ecosystem. Biotechnology centers, joint laboratories, and international summits developed through university-industry collaboration will increase the city's scientific production capacity. Strategic projects such as the "Health Valley" will serve as a center of innovation and investment not only regionally but also nationally, bringing together pharmaceutical, biotechnology, and digital health initiatives within the same ecosystem. These efforts will contribute to Ankara becoming a powerful center of attraction across a wide spectrum, from high-tech production in healthcare to international patient mobility, from R&D investments to the digitization of social services. In this way, the city will realize its potential to become a hub for health and life sciences not only in Turkey but also in the region.

Goal 22: Strengthening Localization and Innovation in Pharmaceutical and Medical Device Production

Goal 23: Transforming the Health Tourism and Service Ecosystem into an Investment Opportunity

Goal 24: Strengthening the Research and Collaboration Infrastructure for Health and Life Sciences

6.3. Roadmap for the Provincial Investment and Promotion Strategy

Table 72: Roadmap for a Livable, Sustainable, and Global Capital Ankara

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A1	Preparing Urban Infrastructure and Transportation Systems for Investment	**H1.1**	Reducing traffic congestion and facilitating access to industry.	**F1.1.1**	Metro and suburban lines will be integrated with industrial zones and the airport.	Ankara Development Agency, Ankara Metropolitan Municipality (ABB), Ankara Electricity, Gas and Bus Operation Institution (EGO), Ministry of Transport and Infrastructure (UAB), Turkish State Railways (TCDD), TCDD Transportation Inc., OIZ Directorates, Supreme Organization of Organized Industrial Zones (OSBÜK), State Airports Authority (DHMİ)		✓	✓	✓
				F1.1.2	Intelligent transportation systems (sensors, dynamic intersection management) will be established.	Ankara Development Agency, ABB, EGO, UAB, Information and Communication Technologies Authority (BTK), Scientific and Technological Research Council of Turkey (TÜBİTAK), Universities	✓	✓	✓	

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F1.1.3	Special service and ring transportation systems will be opened for industrial zones.	ABB, EGO, OIZ Directorates, OSBÜK, Transportation Coordination Center (UKOME), Private Public Transportation Cooperatives	✓	✓	✓	
		H1.2	Increase international access.	**F1.2.1**	The aim is to increase the variety and number of direct international flights from Esenboğa Airport.	Ankara Development Agency, UAB, General Directorate of Civil Aviation (SHGM), DHMİ, Airlines, ABB, Turkish Tourism Promotion and Development Agency (TGA)		✓	✓	✓
				F1.2.2	The airport-city center metro line will be completed.	UAB, ABB, EGO, DHMİ, SHGM, Contractor Companies		✓	✓	
				F1.2.3	The Esenboğa Flight Development Program will be implemented (incentives for airlines, promotion fund, support for new destinations).	Ankara Development Agency, ABB, TGA, UAB, SHGM, DHMİ, Airlines, Ankara Chamber of Commerce (ATO), Tourism Sector NGOs	✓	✓	✓	✓
		H1.3	Promoting Smart City Applications.	**F1.3.1**	A city-wide Open Data and City API Platform will be established.	Ankara Development Agency, ABB, Presidency TÜBİTAK, Universities, Technology Parks, Public IT Suppliers	✓	✓	✓	✓

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F1.3.2	Public transportation, micromobility, and parking systems will be managed with a single ticket/MaaS integration.	Ankara Development Agency, EGO, ABB, UAB, BTK, Payment Service Providers, Micromobility Operators, Parking Operators	✓	✓		
				F1.3.3	Monitoring will be carried out using smart lighting, air quality, and noise sensors.	ABB, Ministry of Environment, Urbanization and Climate Change (ÇŞB), BTK, TÜBİTAK, General Directorate of Meteorology (MGM), Energy Distribution Companies	✓	✓		
				F1.3.4	Real-time data-based management will be provided for traffic, energy, and infrastructure services.	ABB, EGO, Ankara Water and Sewerage Administration General Directorate (ASKI), BaşkentGaz, Energy Distribution Companies, UAB, BTK, TÜBİTAK, Universities	✓	✓		
A2	Promoting Investments in Environmental Sustainability and	**H2.1**	Ensuring the effective management of water resources.	**F2.1.1**	Smart meter systems and digital water management infrastructure will be established.	ASKI, General Directorate of State Hydraulic Works (DSI), ABB, TÜBİTAK, BTK, Ministry of Industry and Technology (STB)	✓	✓	✓	

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
	Resource Management			**F2.1.2**	Digital irrigation projects in agricultural irrigation will be supported.	Ankara Development Agency, DSİ, Ministry of Agriculture and Forestry, Irrigation Unions/Cooperatives, ABB	✓	✓	✓	✓
		H2.2	Increasing Green Transformation Investments.	**F2.2.1**	Electric public transportation and logistics vehicles will be widely adopted.	EGO, ABB, UAB, Ministry of Energy and Natural Resources, Energy Market Regulatory Authority (EMRA), Turkish Electricity Transmission Corporation (TEİAŞ), Logistics Companies	✓	✓	✓	✓
				F2.2.2	Special incentives will be provided for renewable energy and green city projects.	Ankara Development Agency, STB, Ministry of Energy and Natural Resources, EPDK, Provincial Bank Inc. (İLBANK), ABB	✓	✓	✓	✓
				F2.2.3	Urban green corridors and living spaces will be developed as investment opportunities.	Ankara Development Agency, ABB, ÇŞB	✓	✓		
		H2.3	Resilient Cities and Increasing Climate Resilience	**F2.3.1**	Early warning systems and climate risk maps will be prepared against flood and storm risks.	Ankara Development Agency, AFAD, DSİ, MGM, ABB, Universities, ÇŞB	✓	✓		

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F2.3.2	Microgrids, energy storage, and backup power systems will be installed in critical facilities.	Ministry of Energy and Natural Resources, EPDK, TEİAŞ, OSBÜK, ASO, ABB	✓	✓	✓	
				F2.3.3	Green roof and cool surface applications will be implemented to reduce the urban heat island effect.	Ankara Development Agency, ABB, ÇŞB, Sector NGOs	✓	✓		
				F2.3.4	Urban resilience drills will be organized in emergencies, and disaster logistics will be planned.	AFAD, ABB, Provincial Health Directorate, Red Crescent, TCDD Transportation Inc., General Directorate of Security, Gendarmerie	✓	✓	✓	
A3	Making Ankara a Center of Attraction in Creative Economy and Cultural Industries	**H3.1**	Increasing Entrepreneurship and Investment in Creative Sectors	**F3.1.1**	Investment programs will be implemented for design, media, digital games, and creative services ventures.	Ankara Development Agency, STB, TÜBİTAK, KOSGEB, Technology Parks, ATO, Turkish Union of Chambers and Commodity Exchanges (TOBB)	✓	✓	✓	
				F3.1.2	A repayable IP (intellectual property) fund will be put into operation.	Ankara Development Agency, Ankara Development Agency, TÜRKPATENT, TÜBİTAK, Turkish Development and Investment Bank, Technology Parks		✓	✓	✓

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F3.1.3	A feasibility study will be conducted on the establishment of a Creative Culture Island; studios/platforms and co-production areas for cinema-TV, games, XR, and new media production will be encouraged.	Ankara Development Agency, ABB, Ministry of Culture and Tourism (KTB), General Directorate of Cinema, Ankara Development Agency, Universities, ATO, Private Sector (studio/media)	✓	✓	✓	
		H3.2	Offering New Experiences by Digitizing Cultural Heritage	**F3.2.1**	Digitalization and experience centers will be established in cultural heritage areas.	Ankara Development Agency, KTB, General Directorate of Cultural Assets and Museums (KVMGM), ABB, Universities, Technology Parks	✓	✓	✓	
				F3.2.2	"Digital cultural tourism and experience centers" will be opened at Ankara Castle, the Republic Museums, and Gordion.	Ankara Development Agency, KTB, KVMGM, ABB, District Municipalities, UNESCO National Commission of Turkey, TGA	✓	✓	✓	
				F3.2.3	Virtual/interactive applications will be developed to enhance the visitor experience.	Ankara Development Agency, KTB, ABB, Universities, Technology Parks, Game/Graphics Studios	✓	✓		

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H3.3	Increasing International Visibility and Creative Economy Exports	**F3.3.1**	Ankara's creative industry exports will be supported.	Ankara Development Agency, Ministry of Trade, TİM, Exporters' Associations, Ankara Development Agency, Foreign Economic Relations Board (DEİK)	✓	✓	✓	✓
				F3.3.2	International film, culture, and gastronomy festivals will be brought to Ankara.	Ankara Development Agency, ABB, KTB, TGA, DEİK, Sector NGOs, International Festival Organizations	✓	✓	✓	✓
				F3.3.3	International cooperation and promotion programs will be implemented for creative industries.	Ankara Development Agency, KTB, Ministry of Trade, TGA, DEİK, ABB	✓	✓	✓	✓
A4	Strengthening Culture, Tourism, and Sports Investments	**H4.1**	Becoming the Center of International Organizations	**F4.1.1**	The effective use of modern exhibition and conference centers will be encouraged.	Ankara Development Agency, ABB, ATO, Ministry of Trade, TOBB, TGA, Exhibition Companies	✓	✓	✓	✓
				F4.1.2	The establishment of the Ankara Congress and Visitors Bureau will be supported; an international congress and exhibition attraction fund (Event Support Fund) will be operated.	Ankara Development Agency, ABB, ATO, TGA, KTB, Ministry of Trade	✓	✓	✓	✓

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F4.1.3	The "Expo & Sports Valley" project will be an investment area for international sports and cultural events.	Ankara Development Agency, ABB, Ministry of Youth and Sports (GSB), KTB, Private Sector Investors		✓	✓	✓
				F4.1.4	Activities and events within the scope of Ankara 2026 Turkish World Tourism Capital will be supported.	Ankara Development Agency, ABB, KTB, Organization of Turkic States (TDT), TGA, District Municipalities	✓	✓		
		H4.2	Diversify Ankara's tourism potential.	**F4.2.1**	Ecotourism and agro-tourism routes will be created in rural districts.	Ankara Development Agency, ABB, District Municipalities, Ministry of Agriculture and Forestry, General Directorate of DKMP, KTB	✓	✓		
				F4.2.2	Thermal tourism investments will be integrated with cultural and historical tourism.	Ankara Development Agency, KTB, Ministry of Health, ABB, District Municipalities, Private Sector Investors	✓	✓	✓	
				F4.2.3	Ankara's "green walking and cycling routes" will be connected to tourism networks.	Ankara Development Agency, ABB, UAB, KTB, DKMP, District Municipalities, Relevant NGOs	✓	✓		

A LIVABLE, SUSTAINABLE, AND GLOBAL CAPITAL CITY – ANKARA										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A5	Transforming Sports Economy and Sports Tourism into an Investment Area	**H5.1**	Bringing Sports Infrastructure Up to International Standards	**F5.1.1**	Stadiums and indoor arenas will be modernized, and new swimming pools and e-sports centers will be added to districts.	GSB, ABB, District Municipalities, Sports Federations	✓	✓	✓	
				F5.1.2	Accessibility for persons with disabilities will be provided in sports facilities.	Ankara Development Agency, GSB, ABB, District Municipalities, Sports Federations	✓	✓		
		H5.2	Attracting International Sports Organizations	**F5.2.1**	At least 3 major tournaments will be held in Ankara within 5 years.	GSB, ABB, Sports Federations, TGA, International Sports Organizations	✓	✓	✓	✓
				F5.2.2	Collaborations with international federations will be increased.	Ankara Development Agency, GSB, Sports Federations, ABB, International Federations	✓	✓	✓	
				F5.2.3	The Ankara Marathon and youth festivals will be held regularly.	Ankara Development Agency, ABB, GSB, Turkish Athletics Federation, Universities, Relevant NGOs	✓	✓	✓	✓
		H5.3	Developing Sports Investments and Technologies	**F5.3.1**	Sports technology initiatives (wearable devices, performance measurement systems) will be supported.	Ankara Development Agency, TÜBİTAK, KOSGEB, Technology Parks, Universities, GSB	✓	✓	✓	✓
				F5.3.2	Sports camp centers and sports tourism facilities will be offered as investment opportunities.	Ankara Development Agency, KTB, GSB, ABB, Private Sector Investors, TGA	✓	✓	✓	✓

Table 73: Roadmap for Defense, Space, and Dual-Use Technologies

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A6	Strengthening Global Competitiveness in the Defense and Aerospace Industry	**H6.1**	Expanding the Qualified Supplier Ecosystem	**F6.1.1**	The integration of SMEs into the defense industry supply chain will be supported.	Ankara Development Agency, ASO, ATO, KOSGEB, SASAD, Defense Industry Presidency (SSB)	✓	✓	✓	✓
				F6.1.2	Subcontractors will be certified and will comply with quality, traceability, and cybersecurity standards.	Ankara Development Agency, TSE, BTK, ASO, ATO, SSB	✓	✓	✓	
				F6.1.3	Joint testing, quality, and certification centers will be established for supplier companies.	Ankara Development Agency, TSE, TÜBİTAK, OSBÜK, ASO	✓	✓	✓	
				F6.1.4	Cooperation between defense clusters and industrial zones will be increased.	Ankara Development Agency, OSTIM Defense and Aviation Cluster (OSSA), OIZ Directorates, OSBÜK, SAHA Istanbul, Cyber Security Cluster	✓	✓	✓	✓
				F6.1.5	A multi-source and geographic diversification program will be implemented for critical components in the supply chain.	Ankara Development Agency, TOBB, TİM, TESK, OSBÜK, ASO, ATO	✓	✓	✓	✓
		H6.2	Enhancing International Cooperation and	**F6.2.1**	The participation of Ankara companies in defense and aviation fairs will be encouraged.	Ankara Development Agency, ASO, ATO, ATB, TİM, Ministry of Trade	✓	✓	✓	✓

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
			Ankara's Recognition	**F6.2.2**	Special funds will be created for international joint R&D projects.	Ankara Development Agency, TÜBİTAK, European Union (Horizon Europe), SSB	✓	✓	✓	✓
				F6.2.3	Cooperation platforms will be established between civil aviation and the defense industry.	General Directorate of Civil Aviation (SHGM), SSB	✓	✓	✓	✓
				F6.2.4	International defense and space summits will be held in Ankara.	Ankara Development Agency, SSB, SASAD, OSSA, ASO	✓	✓	✓	✓
				F6.2.5	Productization workshops and demonstration studies will be conducted for integration with global original equipment manufacturers (OEMs).	Ankara Development Agency, SSB, ASO, OSTIM Technopark, TUSAŞ, ASELSAN, ROKETSAN	✓	✓		
A7	Promoting the Commercialization of Dual-Use Technologies	**H7.1**	Ensuring the Adaptation of Technologies Developed in the Defense Industry to Civilian Fields	**F7.1.1**	The conversion of products that can be used in areas such as health, agriculture, energy, and disaster management will be supported.	Ankara Development Agency, TÜBİTAK, Ministry of Health, Ministry of Agriculture and Forestry, Ministry of Energy and Natural Resources, AFAD, HAVELSAN	✓	✓	✓	✓
				F7.1.2	Dual-use accelerator programs will be implemented through technology transfer offices.	Ankara Development Agency, Universities, Technology Transfer Offices (TTO), TÜBİTAK	✓	✓	✓	✓
				F7.1.3	Patenting, licensing, and intellectual property processes will be accelerated.	Ankara Development Agency, Turkish Patent and Trademark Office (TÜRKPATENT), Universities	✓	✓		

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F7.1.4	Pilot projects for dual-use technologies will be launched.	Ankara Development Agency, TÜBİTAK, OSBÜK, Technology Parks	✓	✓	✓	
				F7.1.5	A "Dual-Use Collaboration Platform" will be established to bring together defense companies and health technology startups.	Ankara Development Agency, Ministry of Health, SSB, SASAD, Health Technology Associations	✓	✓	✓	✓
				F7.1.6	Pilot applications of imaging, sensor, robotic, and artificial intelligence-based systems in the medical field will be launched.	Ankara Development Agency, TÜBİTAK, Universities, Ministry of Health	✓	✓	✓	
				F7.1.7	A joint health-defense R&D fund will be established, and defense testing and certification infrastructures will also be used for health purposes.	Ankara Development Agency, TÜBİTAK, SSB, Ministry of Health, SASAD	✓	✓	✓	✓
		H7.2	Increasing the Export Capacity of Dual-Use Products	**F7.2.1**	Export support programs will be implemented for dual-use products.	Ministry of Trade, TİM	✓	✓	✓	✓
				F7.2.2	Target market analyses will be conducted and shared with companies.	Ankara Development Agency, Ministry of Trade, Exporters' Associations	✓	✓		
				F7.2.3	International promotion and branding programs will be implemented.	TİM, Ministry of Trade, DEİK	✓	✓	✓	✓

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F7.2.4	Ankara products will be promoted in non-defense markets through trade consultancies.	Ministry of Trade, Foreign Missions	✓	✓		
				F7.2.5	International certification processes will be accelerated for integration into global distribution channels.	Ankara Development Agency, TSE, TÜRKAK, Ministry of Trade	✓	✓	✓	✓
A8	Innovation in Defense and Aerospace Industry Strengthening the Ecosystem	**H8.1**	Deepening University-Industry Collaboration	**F8.1.1**	Specialized technology parks focused on defense and space technologies will be supported.	Ankara Development Agency, OSTIM Technopark, METU Technopark, Bilkent Cyberpark, Hacettepe Technopark, SSB	✓	✓	✓	
				F8.1.2	Dual-use research centers will be established at universities.	Ankara Development Agency, Universities, TÜBİTAK, SSB	✓	✓	✓	
				F8.1.3	Defense and space-focused internship, scholarship, and entrepreneurship programs will be developed for students.	Ankara Development Agency, Council of Higher Education (YÖK), Universities, İŞKUR, SSB, ASELSAN, TUSAŞ, ROKETSAN	✓	✓	✓	✓
				F8.1.4	Defense/space-themed curricula and joint master's programs will be established at universities.	YÖK, Universities, SSB,	✓	✓	✓	✓
		H8.2	Ensuring Investment in New Generation Technologies	**F8.2.1**	Research and development projects in the fields of artificial intelligence, quantum technology, cybersecurity, and unmanned systems will be supported.	Ankara Development Agency, TÜBİTAK, BTK, Universities, SSB	✓	✓	✓	✓

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F8.2.2	A "Space Technologies Development Campus" will be established in Ankara.	Ankara Development Agency, Turkish Space Agency, SSB, ASO, OSTIM Technopark, TUSAŞ	✓	✓	✓	
				F8.2.3	Access to venture capital funds for defense and space initiatives will be increased.	Ankara Development Agency, TÜBİTAK, Turkish Development and Investment Bank, Technology Parks, Turkey Wealth Fund, ASO	✓	✓	✓	✓
				F8.2.4	Localization programs will be implemented for critical materials and advanced production technologies.	Ankara Development Agency, STB, TÜBİTAK, OSBÜK, ASO	✓	✓	✓	✓
		H8.3	Developing a Competent Workforce	**F8.3.1**	Sector-skill maps will be drawn up with OSBs, technology parks, and large companies.	Ankara Development Agency, OIZ Directorates, OSBÜK, ASO, Universities	✓	✓		
				F8.3.2	Accelerated skills programs will be implemented in collaboration with universities, R&D centers, and OSBs.	Ankara Development Agency, Universities, R&D Centers, OSBÜK, İŞKUR	✓	✓	✓	✓
				F8.3.3	On-the-job training and mentoring protocols will be expanded, and participants' employment will be monitored.	Ankara Development Agency, İŞKUR, Universities, ASO, ASELSAN, TUSAŞ	✓	✓	✓	

DEFENSE, SPACE AND DUAL-USE TECHNOLOGIES										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F8.3.4	Cross-sector cooperation clusters (defense and aerospace industry, health technologies, machinery industry, and information and communication technologies, etc.) will be established, and joint R&D projects, training programs, and skills development activities will be carried out through these clusters; cross-sector knowledge transfer and innovative product development processes will be supported.	Ankara Development Agency, OSBÜK, SASAD, Turkish Machinery Federation (MAKFED), Information Technology Industries Association (TÜBİSAD), Health Technologies Associations	✓	✓	✓	✓

Table 74: Roadmap for Competitiveness Based on Digitalization, Innovation, and High Technology

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A9	Strengthening Ankara's Innovation and R&D Capacity	**H9.1**	Increasing the Share of High-Tech Production	**F9.1.1**	R&D projects in value-added sectors (electronics, software, biotechnology) will be supported.	TÜBİTAK, STB, Universities, Technology Parks, ASO	✓	✓	✓	✓
				F9.1.2	The establishment of the "Ankara Technology Hub" for high-tech products will be supported.	ASO, Ankara Development Agency, OSTIM Technopark, METU Technopolis, Bilkent Cyberpark, OSBÜK	✓	✓	✓	✓
				F9.1.3	University-industry joint R&D funds will be established.	TÜBİTAK, YÖK, Universities, ASO	✓	✓	✓	✓
				F9.1.4	Investments in advanced materials, artificial intelligence, microchips, and semiconductors will be supported.	Ankara Development Agency, TÜBİTAK, BTK, Universities, ASELSAN, TUSAŞ, SSB	✓	✓	✓	✓
				F9.1.5	Work will begin on establishing a Hydrogen Technologies R&D Center; pilot lines will be developed for electrolysers, fuel cells, storage, and safety standards.	Ankara Development Agency, Ministry of Energy and Natural Resources, TÜBİTAK, EPDK, Universities	✓	✓	✓	
		H9.2	Developing Design and Testing Infrastructure	**F9.2.1**	R&D and Design Centers will be established.	STB, OSBÜK, ASO, Universities	✓	✓	✓	
				F9.2.2	A Product Testing and Certification Center will be established.	Turkish Standards Institute (TSE), Turkish Accreditation Agency (TÜRKAK), STB, OSBÜK, ASO	✓	✓	✓	

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F9.2.3	Support mechanisms will be established to accelerate the transition from prototyping to mass production.	Ankara Development Agency, TÜBİTAK, KOSGEB, Technology Parks, Investment Banks	✓	✓	✓	
A10	Integrating the Entrepreneurship Ecosystem into Global Funding and Cooperation Networks	**H10.1**	Increasing Access to International Funds	**F10.1.1**	Consultancy services will be provided to enable Ankara entrepreneurs to access European and global funds.	Ankara Development Agency, TÜBİTAK, DEİK, European Union Program Office	✓	✓	✓	✓
				F10.1.2	The connection between angel investor networks and international networks will be strengthened.	Ankara Development Agency, Turkish Business Angels Association (TBAA), TÜBİTAK, European Investment Network	✓	✓		
				F10.1.3	The rate of utilization of programs such as EU Horizon, EIC, and the World Bank will be increased.	Ankara Development Agency, TÜBİTAK, World Bank, European Commission	✓	✓	✓	✓
		H10.2	Strengthening Start-up–Industry Collaboration	**F10.2.1**	Corporate venture capital funds will be established. Funds for artificial intelligence, biotechnology, and green technology will be established.	Turkey Development and Investment Bank, TÜBİTAK, Private Equity Funds	✓	✓	✓	✓
				F10.2.2	Accelerator programs will be implemented between large industrial organizations and start-ups.	Ankara Development Agency, ASO, Technology Parks, Universities, SASAD	✓	✓	✓	✓
				F10.2.3	Entrepreneurship centers will be established in OSBs and technoparks	Ankara Development Agency, OSBÜK, Technology Parks, Technoparks	✓	✓	✓	✓

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H10.3	Integration into Ankara's Global Entrepreneurship Networks	**F10.3.1**	International start-up festivals will be organized in Ankara.	Ankara Development Agency, ABB, TGA, DEİK, Start-up Associations, ATO, ASO	✓	✓	✓	✓
				F10.3.2	A Global Innovation Summit will be held for the entrepreneurship ecosystem.	Ankara Development Agency, TÜBİTAK, YÖK, DEİK, International NGOs	✓	✓	✓	✓
				F10.3.3	Ankara will participate more actively in global platforms.	Ankara Development Agency, TOBB, DEİK		✓	✓	✓
A11	Promoting Green and Digital Transformation	**H11.1**	Accelerating Twin Transformation (Green and Digital) Processes in Industry	**F11.1.1**	Green and Digital Transformation Centers will be established in OSBs.	Ankara Development Agency, OSBÜK, STB, ASO, OSBs	✓	✓	✓	✓
				F11.1.2	GES and energy efficiency projects will be supported.	Ankara Development Agency, Ministry of Energy and Natural Resources, EPDK, ABB, OSBÜK	✓	✓	✓	✓
				F11.1.3	Carbon footprint measurement and reporting services will be provided to companies.	Ankara Development Agency, TSE, TÜRKAK, CSB	✓	✓		
				F11.1.4	Pilot applications for hydrogen use in industry and supply chain demonstrations will be supported.	Ministry of Energy and Natural Resources, STB, TÜBİTAK, OSBÜK, Universities		✓	✓	✓
		H11.2	Increasing the Digitalization Level of Businesses	**F11.2.1**	Digital transformation consulting will be provided to SMEs.	KOSGEB, Ankara Development Agency, BTK, ASO, ATO	✓	✓	✓	

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F11.2.2	Artificial intelligence, IoT, and big data applications will be promoted in industrial facilities.	Ankara Development Agency, STB, TÜBİTAK, BTK, Universities, Technology Parks		✓	✓	✓
				F11.2.3	Participation in programs such as the Local Development Initiative and Technology-Focused Industry Initiative will be encouraged, and a "Digital Transformation Incentive Program" will be created.	STB, General Directorate of Industrial Zones, Ankara Development Agency, OSBÜK	✓	✓	✓	✓
		H11.3	Promoting Sustainable Certification and Standards	**F11.3.1**	Green label applications will be encouraged.	TSE, Ministry of Environment, Urbanization and Climate Change, Ministry of Trade		✓	✓	✓
				F11.3.2	Advanced treatment facilities will be established.	DSI, ABB, Ministry of Environment, Urbanization and Climate Change		✓	✓	✓
				F11.3.3	Environmental certification processes compliant with international standards will be supported.	Ankara Development Agency, TSE, TÜRKAK, Ministry of Trade	✓	✓	✓	✓
A12	Making Ankara a Regional High-Tech Center	**H12.1**	Strengthening Technology Clusters and Specialization	**F12.1.1**	Specialization will be supported in centers such as OSTİM, İvedik, and Başkent OSB.	Ankara Development Agency, OSBÜK, OIZ Directorates, ASO	✓	✓	✓	✓
				F12.1.2	Technology clusters will be established in sectors such as furniture, industrial and construction machinery, medical, software, and defense.	Ankara Development Agency, SASAD, MAKFED, TÜBİSAD, OSBÜK, ASO, ATO, ANKAMOB	✓	✓		

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F12.1.3	University-industry cooperation will support sector-based R&D and innovation centers.	Ankara Development Agency, TÜBİTAK, Universities, ASO	✓	✓	✓	✓
				F12.1.4	Green and Digital Transformation Centers will be integrated into clusters.	Ankara Development Agency, OSBÜK, STB	✓	✓	✓	
				F12.1.5	National and international funding mechanisms will be put in place for cluster projects.	Ankara Development Agency, TÜBİTAK, European Union, World Bank	✓	✓	✓	✓
		H12.2	Attracting International Investors and Funds	**F12.2.1**	A free zone will be established for high-tech companies.	Ministry of Trade, STB, ASA. ATO, Ankara Development Agency		✓	✓	✓
				F12.2.2	Promotional programs will be organized to attract international technology investors to Ankara.	Ankara Development Agency, TGA, DEİK, Ministry of Trade, YASED	✓	✓	✓	✓
				F12.2.3	An "International Investor Relations Office" will be established.	Ankara Development Agency, Ministry of Trade, CB Investment and Finance Office, YASED	✓	✓	✓	
				F12.2.4	Special incentive packages will be prepared for foreign-capital technology companies. The Investment Commitment Advance Credit (YTAK) application will be expanded.	Ministry of Trade, Ministry of Industry and Technology, Central Bank of the Republic of Turkey, YASED	✓	✓	✓	✓

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F12.2.5	Ankara initiatives will be matched with international funds.	Ankara Development Agency, TÜBİTAK, World Bank, European Investment Fund	✓	✓	✓	✓
				F12.2.6	The annual international "Ankara High Technology and Investment Summit" will be held.	Ankara Development Agency, TGA, DEİK, TOBB, YASED		✓	✓	✓
		H12.3		**F12.3.1**	Engineering and technical education programs focused on high technology will be expanded.	YÖK, Universities, Ankara Development Agency, Relevant NGOs	✓	✓	✓	✓
				F12.3.2	The capacity of vocational training centers will be increased to address the shortage of intermediate-level personnel.	Ministry of National Education (MEB), Turkish Employment Agency (İŞKUR), Ankara Development Agency, OSBÜK	✓	✓	✓	
				F12.3.3	The establishment of "Talent Development Academies" in technology parks will be supported.	Ankara Development Agency, Technology Parks, Universities. TTO	✓	✓	✓	✓
				F12.3.4	Internships at technology parks, startup simulations, and competitions will be organized for students.	Universities, Technology Parks, Ankara Development Agency	✓	✓		
				F12.3.5	"Entrepreneurship Workshops" for young people will be established in OSBs and technology parks.	Ankara Development Agency, OSBÜK, Technology Parks	✓	✓	✓	

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H12.4	Strengthening the Entrepreneurship and Innovation Ecosystem	**F12.4.1**	The "Young Entrepreneur Program" will be implemented in pilot high schools selected locally.	MEB, Ankara Development Agency, District Municipalities		✓	✓	✓
				F12.4.2	Mentoring and role model programs will be organized.	Ankara Development Agency, Universities, YÖK	✓	✓	✓	✓
				F12.4.3	An "Intellectual Property and Patent Support Center" will be established in Ankara.	TÜRKPATENT, Ankara Development Agency, Universities		✓	✓	
				F12.4.4	Consultancy services will be provided to SMEs for licensing, patenting, and utility model processes.	TÜRKPATENT, KOSGEB, Ankara Development Agency		✓	✓	✓
				F12.4.5	Regular patent clinics will be held at universities, technology parks, and organized industrial zones.	Universities, TÜRKPATENT, Technology Parks	✓	✓	✓	
				F12.4.6	The "Patent and Commercialization Awards" program will be launched in Ankara.	Ankara Development Agency, TÜRKPATENT, Universities, ASO, ATO		✓	✓	✓
				F12.4.7	The "Global Acceleration Program" will be implemented to help startups enter international markets.	Ankara Development Agency, TÜBİTAK, DEİK, CB Investment and Finance Office,		✓	✓	✓

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F12.4.8	A "Digital Innovation Valley" will be established in Ankara, providing entrepreneurs with shared laboratories and prototype workshops.	Ankara Development Agency, Technology Parks, ABB, Universities		✓	✓	✓
A13	Attracting Investments in the Digital Economy and Creative Content	**H13.1**	Expanding the Software Developer Ecosystem	**F13.1.1**	The "Ankara Development Platform" (secure access to public data, open API services, and a testing environment) will be established.	BTK, Ankara Development Agency, ABB	✓	✓	✓	✓
				F13.1.2	A hackathon and PoC (proof of concept) fund will be implemented; successful projects will be piloted in public institutions.	Ankara Development Agency, TÜBİTAK, Universities, ABB	✓	✓	✓	✓
				F13.1.3	A feasibility study will be conducted on establishing an Open Source Solutions Research and Application Center; the preparation of secure open APIs for the public, a code sharing pool, and corporate OSS transition guides will be supported.	TÜBİTAK, BTK, Universities	✓	✓	✓	
		H13.2	Strengthening Gaming, Media, and Design Startups	**F13.2.1**	A cluster of Game and Digital Experience Studios will be established in Ankara.	Ankara Development Agency, KOSGEB, Technology Parks, Gaming Associations	✓	✓	✓	

DIGITALIZATION, INNOVATION, AND HIGH-TECHNOLOGY-BASED COMPETITIVENESS										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F13.2.2	A repayable intellectual property (IP) and copyright fund will be established; entrepreneurs will be supported in commercializing their projects.	Ankara Development Agency, TÜRKPATENT, KOSGEB, TÜBİTAK		✓	✓	✓
				F13.2.3	Ankara's identity as a "creative economy hub" will be strengthened through investments in digital content.	Ankara Development Agency, Ministry of Culture and Tourism, ABB, TGA	✓	✓	✓	

Table 75: Roadmap for Logistics and International Accessibility

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A14	Strengthening Ankara's International Transportation and Logistics Infrastructure	**H14.1**	Increasing Ankara's Air Transportation Capacity	**F14.1.1**	New direct flights will be launched from Esenboğa Airport.	UAB, SHGM, DHMİ, TGA, Airlines, ABB		✓	✓	✓
				F14.1.2	The airport–city center metro line will be completed.	UAB, AYGM, ABB, EGO, DHMİ		✓	✓	✓
				F14.1.3	Esenboğa Logistics Free Zone will be established.	Ministry of Trade, STB, UAB, OSBÜK, TOBB, Private Sector Investors		✓	✓	✓
				F14.1.4	The Esenboğa Flight Development Program will be implemented (incentives for airlines, promotion fund, new destination support, etc.).	UAB, DHMİ, SHGM, TGA, Airlines, ATO	✓	✓	✓	✓
		H14.2	Strengthening Railway and Road Integration	**F14.2.1**	In cooperation with TCDD, fast rail connections for freight transport to ports will be planned.	TCDD, UAB, OSBÜK, ASO, TİM	✓	✓	✓	
				F14.2.2	Modern logistics bases and cargo terminals will be opened for cargo transportation.	UAB, TCDD, OSBÜK, TOBB Logistics Council, Private Logistics Companies		✓	✓	✓
				F14.2.3	Freight train modernization will be carried out on railway lines.	TCDD, UAB, STB	✓	✓	✓	
				F14.2.4	Integrated logistics corridors will be established between port cities and Ankara.	TCDD, UAB, DEİK, TİM, STB, OSBÜK	✓	✓		

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H14.3	Supporting the Green Transition in Logistics	**F14.3.1**	Electric and low-emission logistics vehicles will be widely adopted.	Ministry of Energy and Natural Resources, EPDK, ABB, UAB, Private Logistics Companies	✓	✓	✓	✓
				F14.3.2	Energy efficiency and renewable energy systems will be established in logistics centers.	Ministry of Energy and Natural Resources, EPDK, OSBÜK, ABB	✓	✓	✓	
				F14.3.3	Regulations will be implemented to reduce the carbon footprint of road transport.	Ministry of Energy and Natural Resources, EPDK, OSBÜK, ABB	✓	✓	✓	
				F14.3.4	Carbon reduction targets in road and rail transport will be made binding.	UAB, CSB, TCDD		✓	✓	
A15	Making Ankara a Regional Logistics Center	**H15.1**	Attracting National and International Logistics Investments	**F15.1.1**	Logistics free zones will be established in Ankara.	Ministry of Trade, STB, UAB, ABB, TOBB			✓	✓
				F15.1.2	Incentive packages will be prepared for international logistics companies.	Ministry of Trade, STB, Ministry of Transport and Infrastructure, ABB, TOBB	✓	✓	✓	✓
				F15.1.3	Logistics fairs will be organized in Ankara for foreign investors.	ATO, Ministry of Trade, DEİK, TGA	✓	✓	✓	
				F15.1.4	Public-private sector financing models will be developed for free zone and logistics investments.	Ministry of Treasury and Finance, Ministry of Trade, STB, Private Sector Investors		✓	✓	✓
		H15.2	Strengthening Clustering and Cooperation	**F15.2.1**	Common platforms will be established between OSBs and logistics companies.	OSBÜK, ASO, TOBB, Logistics NGOs	✓	✓		

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F15.2.2	Clustering projects will be implemented in the logistics sector.	STB, OSBÜK, Ankara Development Agency, TOBB Logistics Council	✓	✓	✓	
				F15.2.3	The "Ankara Logistics Council" will be established through cooperation between the public sector, private sector, and universities.	UAB, STB, Universities, TOBB, ASO	✓	✓	✓	
		H15.3	Integrating Exhibition and Fair Areas into Logistics Strategy	**F15.3.1**	The international exhibition center will be completed.	ABB, ATO, KTB, Ministry of Trade		✓	✓	✓
				F15.3.2	An "Expo Valley" will be planned in Ankara for the integration of exhibitions, conferences, and logistics.	ABB, ATO, TGA, KTB, UAB		✓	✓	✓
				F15.3.3	Integrated congress tourism projects with international transportation will be developed.	ABB, TGA, KTB, TOBB	✓	✓		
A16	Diversifying Ankara's Foreign Trade and Logistics Connections	**H16.1**	Developing Export-Focused Logistics Networks	**F16.1.1**	The use of rail and sea transport combinations will be increased instead of road transport.	UAB, TCDD, TİM, DEİK	✓	✓		
				F16.1.2	Logistics support programs will be implemented for exporting companies.	Ministry of Trade, TİM, Exporters' Associations, ATO		✓	✓	✓
				F16.1.3	Logistics consulting offices focused on foreign trade will be opened in Ankara.	Ministry of Trade, TOBB, Ankara Development Agency, Universities	✓	✓	✓	✓

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F16.1.4	Special logistics centers will be established for high value-added and sensitive products (e.g., medical devices, electronics, etc.).	Ministry of Trade, STB, TSE, OSBÜK	✓	✓	✓	
		H16.2	Supporting E-Commerce Logistics	**F16.2.1**	E-commerce logistics centers will be established in Ankara.	Ministry of Trade, ATO, E-Commerce Associations, Private Sector Logistics Companies, ABB		✓	✓	
				F16.2.2	Storage and distribution facilities will be developed for fast delivery infrastructure.	E-Commerce Companies, Logistics Companies, Ministry of Trade, ABB	✓	✓	✓	
				F16.2.3	Digital customs clearance and logistics software solutions will be promoted.	Ministry of Trade, BTK, General Directorate of Customs, Software Companies	✓	✓	✓	✓
				F16.2.4	Logistics consulting and training programs will be implemented for exporting companies.	Ministry of Trade, TİM, Exporters' Associations, TOBB	✓	✓	✓	✓
		H16.3	Enhancing Regional and Global Integration	**F16.3.1**	Ankara will be integrated into logistics projects along the Silk Road corridor.	UAB, TCDD, DEİK, TOBB		✓	✓	
				F16.3.2	Bilateral cooperation agreements will be signed with international logistics centers.	Ministry of Trade, DEİK, TOBB, International Logistics Companies	✓	✓	✓	✓
				F16.3.3	Ankara's logistics capacity will be highlighted in international investment promotions.	Ministry of Trade, TGA, DEİK, TOBB	✓	✓	✓	✓

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A17	Railway–Port Integration and Urban Micro-Logistics Transformation	**H17.1**	Establishing Dry Port & Railway-Port Connections	**F17.1.1**	A feasibility study will be initiated for the establishment of a Dry Port in Ankara; the land–track–equipment–operating model will be presented to investors as a ready-made package (SPV model).	UAB, TCDD, STB, Private Sector Investors		✓	✓	✓
				F17.1.2	"Fast freight corridors (line capacity/increase, signaling) and terminal modernization to supply the Capital Port and Dry Port will be completed in cooperation with TCDD.	UAB, TCDD, STB, OSBÜK		✓	✓	✓
		H17.2	Providing Urban Micro-Logistics	**F17.2.1**	Micro-Hubs (public-private partnership model) will be established within Ankara.	ABB, UAB, Private Logistics Companies, OSBÜK	✓	✓	✓	
				F17.2.2	Electric distribution vehicles and cargo bicycles will be promoted.	ABB, Ministry of Energy and Natural Resources, Private Logistics Companies	✓	✓	✓	✓
				F17.2.3	Digital customs and logistics software clusters will be supported.	Ministry of Trade, BTK, Universities, Software Companies	✓	✓	✓	✓
		H17.3	Ensuring Smart and Resilient Logistics	**F17.3.1**	Dynamic loading/unloading areas and a digital ramp appointment system will be established.	ABB, UAB, Private Logistics Companies, OSBÜK	✓	✓	✓	

LOGISTICS AND INTERNATIONAL CONNECTIVITY										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F17.3.2	Alternative logistics corridors and backup plans will be activated in the event of a disaster.	AFAD, UAB, TCDD, ABB, Red Crescent	✓	✓		

Table 76: Roadmap for Human Resources and Social Development

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A18	Increasing Qualified Human Resources and Vocational Training Capacity	**H18.1**	Strengthening Vocational and Technical Education Infrastructure	**F18.1.1**	Vocational high schools and applied training centers will be opened in OSBs.	MEB, STB, OSBÜK, OIZ Directorates, ASO, Ankara Development Agency	✓	✓	✓	
				F18.1.2	Modern "apprenticeship and master-apprentice" programs will be developed in collaboration with businesses.	MEB, İŞKUR, ASO, ATO, SMEs	✓	✓	✓	✓
				F18.1.3	Curricula will be developed for new professions based on digitalization, green transformation, and artificial intelligence.	MEB, YÖK, Universities, STB, Ankara Development Agency	✓	✓		
				F18.1.4	A "Graduate-Employer Matching Platform" will be established through cooperation between MEB, İŞKUR, and industry.	MEB, İŞKUR, ASO, ATO, Ankara Development Agency	✓	✓		
		H18.2	Developing Human Resources through University-Industry Cooperation	**F18.2.1**	Specialized programs focused on defense, health, software, and logistics will be launched at universities.	YÖK, Universities, STB,		✓	✓	✓
				F18.2.2	Industrial internships, joint projects, and young engineer scholarship programs will be expanded.	YÖK, Universities, ASO, Ankara Development Agency, KOSGEB	✓	✓	✓	✓

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F18.2.3	On-the-job training and rapid adaptation programs will be implemented for university students.	Universities, İŞKUR, Industrial Organizations, Ankara Development Agency	✓	✓	✓	✓
		H18.3	Increasing Women's and Youth Employment	**F18.3.1**	Vocational training programs will be implemented to increase women's participation in industry.	Ministry of National Education, Ministry of Family and Social Services, Turkish Employment Agency (İŞKUR), Small and Medium Enterprises Development Organization (KOSGEB), Women's Cooperatives, Ankara Development Agency	✓	✓	✓	✓
				F18.3.2	Support for entrepreneurship and innovation will be provided to young people.	KOSGEB, TÜBİTAK, Universities, Technology Parks, Ankara Development Agency	✓	✓	✓	✓
				F18.3.3	Remote work and flexible employment models will be encouraged.	Ministry of Labor and Social Security, İŞKUR, Private Sector Employers, and Trade Unions		✓	✓	✓
				F18.3.4	Mentoring and role model networks will be established for women and young people.	Universities, NGOs, Ankara Development Agency, Women Entrepreneurs Associations	✓	✓	✓	

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A19	Creating a Fast Talent Channel for High Technology	**H19.1**	Developing a Workforce Ready for High-Tech Sectors	**F19.1.1**	Talent Academies will be established in OSBs (on-the-job training, wage support, employment monitoring).	STB, MEB, İŞKUR, OSBÜK, ASO		✓	✓	
				F19.1.2	Accelerated vocational programs (software, electronic assembly, robotic maintenance, etc.) will be implemented.	MEB, İŞKUR, Universities, KOSGEB, MYK	✓	✓	✓	✓
				F19.1.3	The Technology Talent Support Package will be implemented (fast-track permits, housing, and living accommodations).	STB, Ministry of Labor and Social Security, Directorate General of Migration Management		✓	✓	
				F19.1.4	A pool of job-ready individuals will be created for companies, reducing hiring time and costs.	İŞKUR, MEB, ASO,		✓	✓	
A20	Strengthening the Livability and Production Capacity of Rural Areas	**H20.1**	Improving Rural Infrastructure and Quality of Life	**F20.1.1**	Social, cultural, and technological infrastructure (internet, youth centers, cultural centers) will be established in districts.	ABB, District Municipalities, GSB, KTB, STB	✓	✓	✓	✓
				F20.1.2	Accessibility of health and education services in rural areas will be improved.	Ministry of Health, Ministry of National Education, District Municipalities, Ankara Metropolitan Municipality	✓	✓		

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F20.1.3	A study will be conducted on the implementation of social housing projects in rural areas.	Presidency of the Housing Development Administration (TOKİ), Ministry of Environment, Urbanization and Climate Change (ÇŞB), District Municipalities	✓	✓		
		H20.2	Promoting Smart and Value-Added Agriculture	**F20.2.1**	Agricultural technologies (drones, sensors, smart irrigation) will be supported.	Ministry of Agriculture and Forestry, TAGEM, TÜBİTAK, Universities, Agricultural Cooperatives		✓	✓	✓
				F20.2.2	Seed sorting, packaging, and cold storage facilities will be established.	Ministry of Agriculture and Forestry, Agricultural Credit Cooperatives, District Municipalities	✓	✓	✓	
				F20.2.3	Geographically indicated production for value-added products will be encouraged.	TÜRKPATENT, Ministry of Agriculture and Forestry, TOBB, Cooperatives	✓	✓	✓	✓
				F20.2.4	Agricultural education programs and applied agricultural high schools will be expanded.	Ministry of National Education, Universities, Ministry of Agriculture and Forestry, Chambers of Agriculture	✓	✓	✓	✓
		H20.3	Establishing Pilot Ecosystems in Smart Agriculture	**F20.3.1**	An "AgriTech Pilot Ecosystem" will be established; smart irrigation sensors and drone monitoring systems will be put into operation.	Ministry of Agriculture and Forestry, TÜBİTAK, Universities, Technology Companies, Ankara Development Agency		✓	✓	

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F20.3.2	Farmers' access to technology will be facilitated through a hardware-as-a-service (Hardware-SaaS) model.	Ministry of Agriculture and Forestry, Private Technology Companies, Universities, Technology Parks		✓	✓	
				F20.3.3	A farmer-technology company revenue sharing model will be implemented through data cooperatives.	Ministry of Agriculture and Forestry, Cooperatives, Universities, Technology Companies		✓	✓	
		H20.4	Creating Thematic Production Regions	**F20.4.1**	Specialized production regions based on products such as carrots, cherries, and potatoes will be established in districts.	Ministry of Agriculture and Forestry, District Municipalities, Cooperatives	✓	✓	✓	
				F20.4.2	Agricultural industrial zones and cooperatives in rural areas will be supported.	STB, OSBÜK, Ministry of Agriculture and Forestry	✓	✓	✓	✓
				F20.4.3	Biogas and waste facilities will be established for the conversion of animal waste.	ÇŞB, Ministry of Agriculture and Forestry, Private Investors		✓	✓	
		H20.5	Enabling Learning Cities and Inclusive Learning	**F20.5.1**	Recognition of prior learning (RPL), micro-certificates, and digital skills mobilization will be implemented.	MEB, YÖK, Universities, Ankara Development Agency	✓	✓	✓	
				F20.5.2	Digital inclusion programs (rural broadband and device support) will be implemented.	UAB, BTK, ABB, District Municipalities		✓	✓	
A21	Supporting Social Development and	**H21.1**	Increasing the Diversity of Social Infrastructure	**F21.1.1**	Social centers, youth centers, and cultural and artistic spaces will be opened in districts.	ABB, District Municipalities, GSB, KTB	✓	✓	✓	✓

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
	Inclusive Urbanization			**F21.1.2**	The capacity of elderly and disabled care centers will be increased.	Ministry of Family and Social Services, Ministry of Health, District Municipalities, ABB	✓	✓	✓	✓
				F21.1.3	Immigrant integration centers will be established.	Directorate General of Migration Management, Ministry of Family and Social Services, NGOs, ABB		✓	✓	✓
				F21.1.4	A monitoring system for urban quality of life indicators will be established.	ABB, ÇŞB, Universities		✓	✓	✓
		H21.2	Increasing Social Participation and Volunteering	**F21.2.1**	Volunteer programs for university students and young people will be expanded.	GSB, Universities, NGOs	✓	✓	✓	✓
				F21.2.2	Local communities will be involved in rural development projects.	Ministry of Agriculture and Forestry, District Municipalities, Cooperatives, NGOs, Ankara Development Agency	✓	✓	✓	
				F21.2.3	A platform for cooperation between NGOs, the public sector, and the private sector will be established for social projects.	NGOs, ABB, Ankara Development Agency, Chambers of Commerce	✓	✓		

HUMAN CAPITAL AND SOCIAL DEVELOPMENT										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H21.3	Supporting Social Entrepreneurship and Cooperatives	**F21.3.1**	Financial and educational support will be provided to women's and youth cooperatives.	Ministry of Family and Social Services, KOSGEB, Ministry of Agriculture and Forestry, Women's Cooperatives		✓	✓	✓
				F21.3.2	Social entrepreneurship centers will be established.	Universities, NGOs, KOSGEB	✓	✓	✓	
				F21.3.3	Common marketing platforms will be established for producer cooperatives in rural areas.	Ministry of Agriculture and Forestry, Cooperatives, TOBB		✓	✓	
				F21.3.4	Microcredit and grant programs will be implemented for social entrepreneurs.	KOSGEB, Ministry of Family and Social Services, Development Agencies, NGOs		✓	✓	✓

Table 77: Roadmap for the Health and Life Sciences Ecosystem

HEALTH AND LIFE SCIENCES ECOSYSTEM										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
A22	Strengthening Localization and Innovation in Pharmaceutical and Medical Device Production	**H22.1**	Reducing External Dependence in Medical Devices and Pharmaceuticals	**F22.1.1**	Long-term incentive programs will be implemented for companies engaged in domestic production, and regular updates will be provided.	STB-Local Development Initiative, Ministry of Health, Turkish Medicines and Medical Devices Agency (TİTCK), KOSGEB,	✓	✓	✓	✓
				F22.1.2	Priority will be given to domestic production in public procurement.	Ministry of Health, Turkish Medicines and Medical Devices Agency (TİTCK), Ministry of Treasury and Finance, Social Security Institution (SGK), Defense Industries Directorate (DMO)	✓	✓	✓	
				F22.1.3	Localization programs will be launched for critical inputs.	Ministry of Industry and Technology, TÜBİTAK, Universities, Pharmaceutical and Medical Associations		✓	✓	✓
		H22.2	Accelerating Product Development and Certification	**F22.2.1**	Feasibility studies will be conducted on the establishment of a Pharmaceutical/Medical Testing & Certification Center.	TÜBİTAK, Ministry of Health, Universities, TSE	✓	✓	✓	

HEALTH AND LIFE SCIENCES ECOSYSTEM										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F22.2.2	The establishment of a Clinical Research Center will be supported; GCP-compliant infrastructure, rapid ethical/approval mechanisms, and a volunteer management system will be operated for Phase I–IV studies.	Ministry of Health, Universities, Ethics Committees, TÜBİTAK,	✓	✓	✓	✓
		H22.3	Increasing Innovation in Health Technologies	**F22.3.1**	Biotechnology, artificial intelligence-based diagnostics, and wearable health technologies will be supported.	TÜBİTAK, Ministry of Health, Universities, Technology Parks, Ankara Development Agency		✓	✓	✓
				F22.3.2	Incubators and accelerators will be established for health initiatives.	Ankara Development Agency, Technology Parks, Universities, KOSGEB	✓	✓	✓	
				F22.3.3	New projects based on defense-health-IT integration will be launched.	Ministry of Health, STB, TÜBİTAK, SSB	✓	✓	✓	
A23	Transforming Health Tourism and Service Ecosystem into Investment Opportunities	**H23.1**	Increasing the Potential of Health Tourism	**F23.1.1**	A current health tourism route for Ankara will be prepared.	KTB, Ministry of Health, Ankara Development Agency	✓	✓		
				F23.1.2	The number of certified hospitals and clinics for health tourism will be increased.	Ministry of Health, Turkish Medicines and Medical Devices Agency (TİTCK), Private Hospitals Association	✓	✓		
				F23.1.3	Ankara will be promoted at international health tourism fairs.	KTB, Ministry of Health, Ankara Development Agency, Ministry of Trade	✓	✓	✓	✓

HEALTH AND LIFE SCIENCES ECOSYSTEM										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F23.1.4	Thermal facilities and cultural/museum route packages will be integrated.	KTB, Ministry of Health, ABB, District Municipalities, Association of Turkish Travel Agencies (TURSAB)	✓	✓		
		H23.2	Digitizing health services, improving care services for the elderly and disabled.	**F23.2.1**	Modern care centers will be established.	Ministry of Health, Ministry of Family and Social Services, Private Investors		✓	✓	
				F23.2.2	Home care services will be expanded.	Ministry of Health, Ministry of Family and Social Services, NGOs	✓	✓	✓	✓
				F23.2.3	Rehabilitation facilities integrated with health tourism will be opened.	Ministry of Health, KTB, Private Investors	✓	✓	✓	
				F23.2.4	Telehealth and remote diagnosis systems will be expanded, and digital patient record systems will be fully integrated.	Ministry of Health, TÜBİTAK, BTK, Universities, Private Health Technology Companies		✓	✓	
				F23.2.5	The Smart/Green Hospital Standard (energy efficiency, water recovery, emergency backup power) will be implemented.	Ministry of Health, Ministry of Environment, Urbanization and Climate Change, University Hospitals	✓	✓	✓	
		H23.4	Digital One-Stop Health Tourism.	**F23.4.1**	A multilingual, one-stop platform (appointment–visa–accommodation–payment) will be planned.	Ministry of Health, KTB, Ministry of Trade, BTK, TURSAB		✓	✓	

HEALTH AND LIFE SCIENCES ECOSYSTEM										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
				F23.4.2	Single-point promotion and guidance will be provided for health and tourism investments.	KTB, Ministry of Health, Ankara Development Agency, Ministry of Trade	✓	✓	✓	✓
A24	Strengthening Research and Collaboration Infrastructure for Health and Life Sciences	**H24.1**	Developing university-industry collaboration.	**F24.1.1**	The establishment of specialized biotechnology and health R&D centers at universities will be encouraged.	YÖK, Universities, TÜBİTAK,		✓	✓	✓
				F24.1.2	Health technology clusters in technology parks will be supported.	STB, Technology Parks,		✓	✓	✓
				F24.1.3	The establishment of joint clinical data/simulation laboratories in the university-hospital-technology park triangle will be encouraged.	Universities, Hospitals, Technology Parks, Ministry of Health		✓	✓	
		H24.2	Increasing international investment and cooperation.	**F24.2.1**	Investment incentive packages (location selection, incentives, talent, supplier map) will be prepared for foreign medical technology companies.	STB, Ministry of Trade, Ministry of Health, Ankara Development Agency, YASED	✓	✓	✓	✓
				F24.2.2	Cooperation agreements will be made with international pharmaceutical and medical clusters.	Ministry of Health, TÜBİTAK, International Pharmaceutical/Medical Associations, YASED	✓	✓	✓	✓
				F24.2.3	The International Health Technologies Summit will be held in Ankara.	Ministry of Health, Ankara Development Agency, TÜBİTAK, Universities, Private Sector		✓	✓	✓

HEALTH AND LIFE SCIENCES ECOSYSTEM										
Code	**Strategic Goal**	**Code**	**Objective**	**Code**	**Activities**	**Institutions to Collaborate With**	**2025**	**2026**	**2027**	**2028**
		H24.3	Convert Health Valley into an investment program.	**F24.3.1**	Health Valley will be established to encompass pharmaceuticals, medical devices, biotechnology, and digital health initiatives.	STB, Ministry of Health, Universities, Technology Parks, Ankara Development Agency		✓	✓	✓
				F24.3.2	A matching office for national and international funds will be established, and private financing services will be put into operation.	STB, Ministry of Treasury and Finance, Development Agencies, International Funds		✓	✓	✓
				F24.3.3	The ecosystem will be scaled by ensuring the integration of OSBs, universities, and technology parks.	OSBÜK, Universities, Technology Parks, STB	✓	✓	✓	

7. MONITORING AND EVALUATION MECHANISM

The monitoring and evaluation mechanism is an important feedback and measurement method that contributes to the updating and evaluation of the targets and activities determined during the implementation of the Ankara Provincial Investment and Promotion Strategy. The monitoring and evaluation phase involves a systematic monitoring method at regular intervals to assess and track the feasibility of the defined goals, targets, and activities, as well as the successes achieved. This phase, carried out at specific intervals, provides motivation for continuous improvement within the framework of the report.

The basis of the monitoring and evaluation mechanism is to track the status of measurable indicators. The main axis of the monitoring and evaluation mechanism in the Ankara Provincial Investment and Promotion Strategy is to be able to track the goals, targets, and activities defined in the roadmap section. The monitoring process is a systematic and repetitive process in which data obtained about activities is provided to those responsible, informing them of the stage of the target. For the process to be efficient and healthy, the responsible units must monitor their performance activities.

Tracking planned activities is a fundamental tool for achieving goals and goals. Monitoring activities reveals the performance of goals and goals and shows the progress made in the strategic focus areas to which the goals and goals are linked. In addition to reporting, surveys can be conducted to measure satisfaction with the progress of activities. Measuring satisfaction levels and feedback provides data on the implementation status of actions. The active participation of stakeholder groups identified in the strategy document, as well as interviews and meetings conducted during the monitoring phase, are also important aspects of this process. In the planning process, where governance is important, obtaining feedback from stakeholder groups will contribute to the development of transparent, equitable, and effective governance and the monitoring of actions.

The evaluation process involves a general assessment based on the measurement results of the data obtained and the progress of activities, conducted with the participation of responsible agency officials at the end of the monitoring periods. The results obtained through evaluation demonstrate the sustainability of the actions and their impact on the target.

The evaluation process is not something that can be done instantly; it must be spread out over time and follow innovative work that is constantly progressing in the world and in Turkey. Stakeholders in the evaluation process must analyze the results according to changes at the global, national, and Ankara levels. The sustainability of the target and the extent to which it meets the need should be considered in the evaluation process. Questions such as "Has there been any change in the defined strategic focus?", "Has there been any change that will alter the current situation of the region?", and "What can be done to take the region to a higher level in terms of production and investment and make it a leading region?" should be asked and evaluated.

Evaluation Criteria

The evaluation is primarily based on five concepts and seeks answers to the following questions:

1. **Relevance:** Is the current work or project a good idea in terms of improving the current situation? Are the priorities of the target groups taken into account?
2. **Effectiveness:** Have the plans (goals, outputs, and activities) been achieved? Is the intervention logic correct? Is what is being done the best way to increase impact?
3. **Efficiency:** Were resources used in the best possible way? What else could have been done to improve the implementation in order to maximize impact at an acceptable and sustainable cost?

4. **Impact:** To what extent can the project contribute to long-term goals? What unexpected results, positive or negative, could the project produce?
5. **Sustainability:** Will the positive impact of the project continue once the funds provided for the project are exhausted?

Analysis Process

The success of the Ankara Provincial Investment and Promotion Strategy depends not only on the implementation of activities but also on the regular measurement, evaluation, and inclusion of these activities in the learning cycle. The analysis process will be carried out to monitor the progress of the strategy, identify problems at an early stage, and reveal new opportunities. The analysis is based on a systematic comparison of the targeted data with the current situation data. In this context:

- **Current Situation Data:** Key indicators will be established before activities begin.
- **Progress Data:** The progress of activities will be recorded regularly during the implementation process.
- **Performance Data:** Deviations between targets and actual results will be evaluated based on success criteria.
- **Risk and Issue Data:** Risks and issues arising during the implementation of activities will be reported regularly.

This multi-layered data structure will enable the strategy to track not only outputs but also outcomes and impacts.

Key Analysis Questions

The following questions must be systematically answered during the analysis process:

- **Achievement of Outcomes:** Were the desired outcomes achieved? Do the outputs produced match those planned, and to what extent do these outputs contribute to the targeted outcomes?
- **Achievement of Goals:** Have the defined goals been achieved? What changes have occurred in the project environment, and how have these changes affected the strategy?
- **Status of Risks:** What are the risks associated with the goals? Is there a risk of non-achievement? How can these risks be managed?
- **Organizational Structure:** Have there been any changes in the project organization or in the mechanisms for collaboration with target groups? How do these changes affect implementation?

Identification of Corrective Actions

When the desired progress is not achieved, corrective actions determined by the risk management mechanism are defined and the most appropriate ones must be implemented. If necessary, it is recommended to make adjustments in resources, activity timing, targets, indicators, and the mechanisms and procedures used for collaboration.

Table 78: Monitoring and Evaluation Table

No	Activity	Timing (According to the project plan)	Participants
1	Pre-information letters to stakeholders regarding monitoring and evaluation	At the start of the work and two weeks before monitoring and evaluation meetings	Project Manager Stakeholders Beneficiaries
2	Project group meeting	6-month cycles	Project Manager
3	Evaluation meetings	At the beginning of the year	Project Manager Stakeholders Beneficiaries
4	Survey studies	If necessary	Stakeholders Target Audience
5	Face-to-face interviews	At the end of the year	Stakeholders Target Audience
6	Online or telephone meetings	When additional information is required	Stakeholders Target Audience
7	On-site monitoring	During the work (construction, activities, implementation, etc.)	Project Manager
8	Preparation of the monitoring report	At the end of the year	Project Manager

Interim Evaluation Report Notes

Table 79: Mİd-Term Evaluation Report Table

No	Monitoring Heading	R	V	E	I	S	General

R: Relevance, V: Efficiency, E: Effectiveness, I: Impact, S: Sustainability

Mid-Term Evaluation Score Explanations

Table 80: Notes for the Mid-Term Evaluation

Unacceptable	Poor	Adequate	Good	Excellent
-2	-1	0	1	2
Very Unsuccessful	Fail	Adequate/Cannot Be Evaluated	Successful	Very Successful
HU	U	A or N/A	S	HS

8. RISK MANAGEMENT MECHANISM

Risk management is the process of identifying, assessing, and controlling threats to the gains of the Ankara Provincial Investment and Promotion Strategy (2025-2028). The risk management program should be integrated with the organizational strategy. Risks identified through the evaluation of data following monitoring meetings on the targets and activities of the Ankara Provincial Investment and Promotion Strategy (2025-2028) will be determined with the participation of project managers and stakeholders.

Table 81: Risk Identification Table

Risk Type	Reason(s)	Potential Impacts	Management Approach
Macroeconomic Risks	Global fluctuations, currency/interest rate volatility	Postponement of investment decisions, increased costs	Scenario analyses, alternative financing, green/technology funds
Regulatory and Bureaucratic Risks	Complex permit procedures, lengthy approval processes	Prolonged investment process, loss of investors	One-stop office mechanism, digital processes, regulatory consulting
Infrastructure and Logistics Risks	Industrial zone infrastructure deficiencies, logistics costs	Project delays, reduced competitiveness	Acceleration of infrastructure investments, strengthening of logistics centers
Human Resource Risks	Shortage of skilled labor, brain drain	Inability to find labor, increased costs	University-industry cooperation, vocational training, talent pools
International Competition Risks	Competition with rival provinces/countries	Investors turning to different locations	Targeted promotional campaigns, brand value enhancement
Environmental and Social Risks	Climate change, energy costs, social expectations	Sustainability issues, social reactions	Green transformation investments, consultation with social stakeholders
Corporate Coordination Risks	Lack of inter-organizational communication and cooperation	Delays, waste of resources, conflicts of authority	Strengthening the coordination committee, clarifying responsibility matrices
Risk of changing priorities	Differentiation of national/regional policies	Disruption of activities, diversion of resources to other areas	Flexible implementation, scenario planning, long-term roadmap

After the risk identification phase, the risks determined by incorporating concrete and abstract factors will be assessed and calculated. Following the risk assessment, the calculation phase will be carried out according to the benefit/cost and profit/loss ratios of the targets or activities.

The stage following the identification and assessment of risk is to decide on the approach to be used in combating the risk and the technique to be used for each one. At this stage of the risk management process, it is quite difficult to decide which technique to use to combat each risk. These decisions vary depending on the institution and organization. To determine the suitability of the risk and technique, the risk manager must calculate the extent of potential loss, probabilities, and compensation sources (in case of loss). The benefit/cost and profit/loss ratios of each approach are evaluated. The following criteria will be decisive in selecting alternative risk mitigation tools.

- **Risk Level:** The level of expected gains and losses,
- **Cost-Effectiveness:** The feasibility of tools in terms of cost and labor,
- **Timing:** The urgency of the risk and the response time,
- **Resource Utilization:** Effective evaluation of human resources and existing capacity

Once these stages are completed, the alternative decision made by the project manager and stakeholders will be implemented.

Table 82: Risk Description Table

Target/Activity Code	Subject Analysis	Hazards	Hazard Causes

Table 83: Risk Assessment and Calculation Table

Target/ Activity Code	Risk Level (-2, -1, 0, 1, 2)	Economic Viability (-2, -1, 0, 1, 2)	Timing (-2, -1, 0, 1, 2)	Resource Constraints (-2, -1, 0, 1, 2)
Description	**Risk Level:** Performs profit-loss analysis • -2, Loss exceeding 50% of the budget • -1, Loss of less than 50% of your budget • 0, Break-even point • 1, Less than 50% of the budget in profit • 2, Profit greater than 50% of the budget		**Economic Viability:** Determines changes during the phase of reaching operational activity. • -2, Too much • -1, Excessive • 0, No change • 1, Low • 2, Very little	
	Timing: Determines the change in the process. • -2, 50% longer than the normal process • -1, 25% longer than the normal process • 0, Process does not extend • 1, 25% less than the normal process • 2, 50% less than the normal process		**Resource Constraints:** Evaluates the efficiency of the target audience affected by the activity. • -2, 50% less efficiency for the target audience • -1, 25% less efficiency for the target audience • 0, Productivity remains unchanged • 1, 25% higher efficiency for the target audience • 2, 50% more efficiency for the target audience	

The process flow for the implementation of strategy activities and the monitoring, evaluation, and risk management mechanism is provided below.

- The Ankara Provincial Investment and Promotion Strategy (2025-2028) study identifies the Ankara Development Agency as the responsible institution for monitoring and coordinating the implementation of the identified activities.

- The responsible institution and organization official will be determined for the preparation, implementation, and completion of each activity.

- The Ankara Development Agency will establish a tracking system for determining, renewing, and finalizing project activities.

- A Periodic Monitoring and Evaluation Meeting will be held once a year with the institutions or organizations responsible for the activities, and risks regarding the activities to be carried out will be identified. Coordination will be ensured between interactive activities during the implementation phase of the activities.

- In addition to regular monitoring meetings, extraordinary meetings will be held in the event of unexpected risks, and the most appropriate alternative risk management tool will be selected. The tools to be evaluated include alternative financing models, temporary infrastructure solutions, one-stop office applications, coordination meetings, scenario planning, and environmental/social impact mitigation methods.

9. CONCLUSION

Ankara's investment and promotion capacity rests on a strong foundation for high value-added growth, underpinned by its role as the nation's capital and decision-making hub, the concentration of universities and R&D infrastructure, and the maturity of its defense and aerospace ecosystem. A highly qualified engineering talent pool, advanced healthcare services, and medical production capacity further reinforce this structure as complementary components to the technopark and organized industrial zone (OIZ) networks.

Evidence gathered during the strategy development process indicates that, when its structural advantages are properly positioned, Ankara has the potential to compete not only at the regional but also at the global level. Nevertheless, a number of structural weaknesses continue to constrain the city's visibility and accessibility. These include limited international recognition, lagging behind Istanbul and İzmir in attracting foreign direct investment, the absence of free zones, insufficient diversity in long-haul international flights, and shortcomings in airport connectivity. Gaps in logistics and rail–port integration, the perception of bureaucratic processes as slow and unpredictable, inadequate green and digital transformation capacity among SMEs, and certain deficiencies in quality-of-life indicators further amplify investor hesitation.

Evidence derived from stakeholder consultations and survey findings clearly indicates that access to and allocation processes for investment land constitute the primary bottleneck. The limited availability of suitably qualified plots, combined with delays in permitting and compliance procedures, increases both time and cost risks for investors. Frequent regulatory changes, uncertainty in coordination between central and local administrations, and the insufficient institutionalization of investor-friendly practices further complicate decision-making. In addition, a short-term, fragmented, and regionally imbalanced structure in financing and incentive schemes—together with the lack of sustainable financing instruments at the commercialization stage and constrained access to risk capital—acts as a significant deterrent, particularly for technology-based investments.

Despite its strong university infrastructure and human capital base, Ankara faces pronounced gaps in the intermediate workforce profiles and next- generation skills demanded by industry. The insufficient alignment of vocational education programs with green and digital transformation dynamics creates a structural gap that affects productivity and quality in manufacturing. The limited availability of "green-collar" skills poses risks for compliance with carbon regulations and sustainability standards, while skills mismatches in blue-collar employment constitute a critical challenge for enterprises.

The Employment Workshop Program implemented by the Ankara Development Agency introduces a practical and accelerated mechanism to reduce shortages in the blue-collar workforce required by industry. In parallel, the Green-Collar Program aims to systematically strengthen skill acquisition that supports firms' adaptation to green transformation processes.

The combined capacity generated by these programs establishes a concrete intervention area to address structural deficiencies in human capital, while also indirectly contributing to overcoming the challenges SMEs face in branding, marketing, exports, and integration into value chains.

The proposed strategy adopts an integrated approach that aligns livability and sustainability with investment attractiveness. Connecting organized industrial zones (OIZs) and the airport to the city through metro and suburban rail lines, expanding intelligent transport systems, and developing dedicated ring solutions for industrial areas will enhance both labor mobility and logistics efficiency. The introduction of new direct international routes from Esenboğa Airport, the implementation of a flight development program, and the completion of the city–airport rail connection will strengthen Ankara's international accessibility and generate a step-change effect on investor perception.

In the field of environmental sustainability, water management, renewable energy, and climate resilience have been directly linked to investment attractiveness. Smart metering and digital water management systems, the transition to electric public transport and logistics vehicles, green corridors, and microgrid applications will reduce urban risks while increasing cost predictability for businesses. Early warning systems and climate risk maps for flood and extreme weather events, together with backup power and storage solutions for critical facilities, will safeguard both production continuity and urban resilience.

An investment package designed to enhance Ankara's visibility in the creative economy and cultural industries has been developed. Investment programs targeting design, media, gaming, and new media ventures, alongside a reimbursable intellectual property fund, will accelerate the commercialization of creative output. Enhancing visitor experiences at locations such as Ankara Castle, Republic-era museums, and Gordion through digital culture and experience centers—combined with the city's capacity to attract international festivals and events—will create a strong leverage effect for both tourism and city branding.

Ankara's distinctive strength in defense, space, and dual-use technologies will be scaled through supply chain deepening and civilian commercialization. Accelerating SME compliance with certification and traceability standards will be supported by shared testing and quality centers, inter-cluster cooperation, and diversified sourcing strategies. Accelerator programs are planned to adapt defense-origin technologies—such as imaging, sensors, robotics, and artificial intelligence—to civilian applications in healthcare, agriculture, energy, and disaster management, alongside streamlined patent and licensing processes and pilot deployments.

In the areas of digitalization, innovation, and high technology, a comprehensive support structure has been established covering the entire product development cycle—from design and testing to certification and commercialization. The strategy aims to expand R&D and design centers, strengthen product testing and certification infrastructure, and increase the share of high-tech production through strategic platforms in technology development, data analytics, green transformation, and hydrogen technologies. Corporate venture capital funds, advisory services for access to international finance, and accelerator programs will further enhance Ankara's integration into global innovation networks.

In logistics and international accessibility, Esenboğa-centered flight development initiatives, logistics free zones, dry ports, and intermodal freight hubs will complete missing links between production and external markets. Rail–port integration, freight rail modernization, and corridors connected to port cities—supported by specialized logistics centers for high value-added and sensitive products—will reinforce Ankara's competitiveness. Micro-hubs for e-commerce logistics, electric delivery fleets, and digital customs solutions will reduce the carbon footprint while improving delivery efficiency.

In human capital and social development, the establishment of practical vocational training centers within OIZs, accelerated skills programs, and talent academies is planned to create job-ready workforce pools. University– industry cooperation projects, internship and scholarship schemes, and on- the-job training programs will accelerate talent supply. Programs aimed at increasing women's and young people's participation in production will be supported through flexible working arrangements and mentoring networks, while quality-of-life investments in rural districts—together with smart agriculture pilots and thematic production zones—will promote inclusive growth.

In healthcare and life sciences, localization and innovation are positioned as a new growth pillar for Ankara. Prioritizing domestic production in public procurement, localizing critical inputs, and establishing pharmaceutical and medical testing-certification as well as clinical research centers will shorten product development cycles and time-to-market. Health tourism routes, rehabilitation and care ecosystems, telehealth and digital patient record integration, and "Smart/Green Hospital" standards will enhance service quality and strengthen international demand. The "Health Valley" approach, supported by fund-matching mechanisms and OIZ–university–technopark integration, will scale the ecosystem.

Value-added production, smart agriculture applications, and cooperative structures in Ankara's rural districts constitute a key complementary pillar of the strategy. The AgriTech ecosystem, geographical indication products, and agricultural OIZ initiatives will strengthen rural development while increasing the province's investment diversity.

In the next phase, horizontal measures that improve process efficiency and reinforce international visibility should be prioritized. A one-stop, time- bound, and transparent parcel guidance system for investment land allocation; modular compliance checklists tailored to different investment types; parallel approval workflows; and silent-consent pilots with defined service levels for critical permits will reduce uncertainties at the investor's initial point of contact. These steps will significantly shorten investment decision timelines and enhance Ankara's competitiveness.

In financing, long-term, performance-based incentive packages aligned with the twin green and digital transformation should replace short-term and fragmented schemes. Commercialization-focused credit and guarantee instruments, the expansion of domestic venture capital pools, and the activation of corporate venture capital funds will enable scaling—particularly in high-technology and creative production sectors. Advisory and project offices facilitating access to international funds and matching mechanisms will increase success rates in EU and multilateral programs.

In human capital development, the mapping of sector–skill needs in collaboration with OIZs and technoparks, the co-design of accelerated programs with industry, and systematic employment tracking will strengthen supply–demand alignment. Micro-credentials for green and digital skills, recognition of prior learning, and lifelong learning pathways— combined with targeted programs for women and young people—will enhance Ankara's capacity to attract and retain talent. Investments in digital inclusion, social infrastructure, and production facilities in rural districts will help reduce regional disparities.

In terms of international visibility, flagship initiatives such as the "Ankara High Technology and Investment Summit", the "Global Innovation Summit", and international events focused on defense and space will serve as powerful narrative tools to position the city on investors' radar. The Esenboğa Flight Development Program, opening direct routes to selected markets, combined with targeted promotion of Ankara's logistics capacity and technological strengths and supported by an "International Investor Relations Office" and priority market analyses, will establish a sustainable pipeline for foreign direct investment.

When Ankara integrates its strong technology base, institutional know-how, and capital city advantages with accessible investment locations, accelerated processes, international visibility, and twin-transformation-oriented investments, it holds significant potential for a marked leap in high value- added production, sustainable growth, and quality employment during the 2025–2028 period. The success of the strategy depends on the decisive implementation of defined actions, continuous collaboration among stakeholders, and the full operation of a robust monitoring and evaluation framework with measurable indicators. When the proposed roadmap is consistently implemented, Ankara will emerge not only as Turkey's but also the region's reference capital for innovation, investment, and quality of life.

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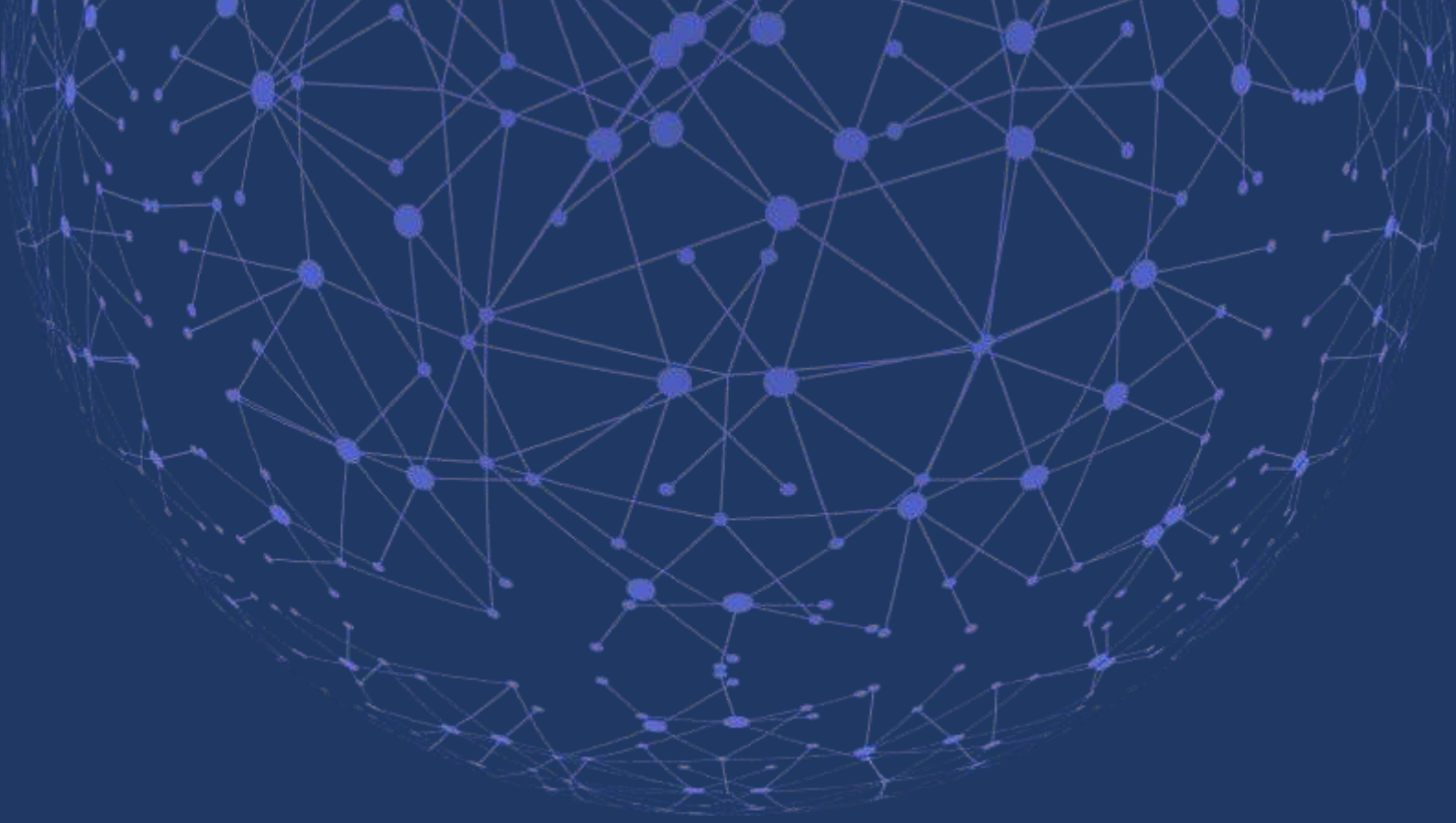

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