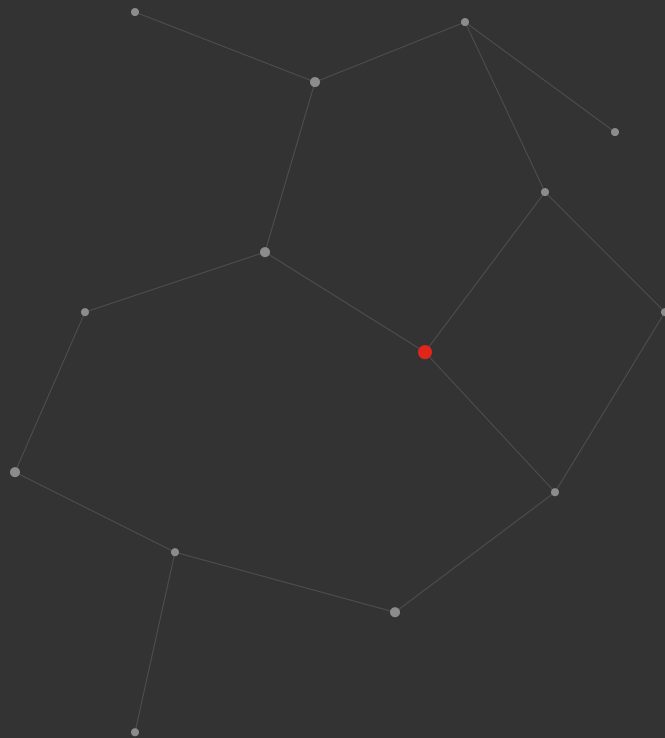


E-BOOK • 2026

DACH Nearshore Guide 2026

Istanbul as a nearshore destination for German-speaking enterprises — evaluated on data, not promises.





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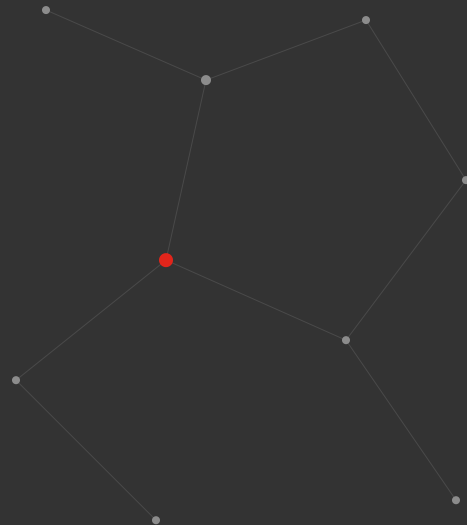
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Engagement models, vendor red flags and a three-phase start

01

The DACH Talent Equation

Before comparing destinations, it is worth quantifying the problem in German numbers.



The gap has narrowed — the shortage has not

Germany's count of unfilled IT positions came down from its 2023 peak, but not because supply improved. Hiring slowed with the economy. The structural shortage underneath is unchanged — and companies expect it to sharpen.

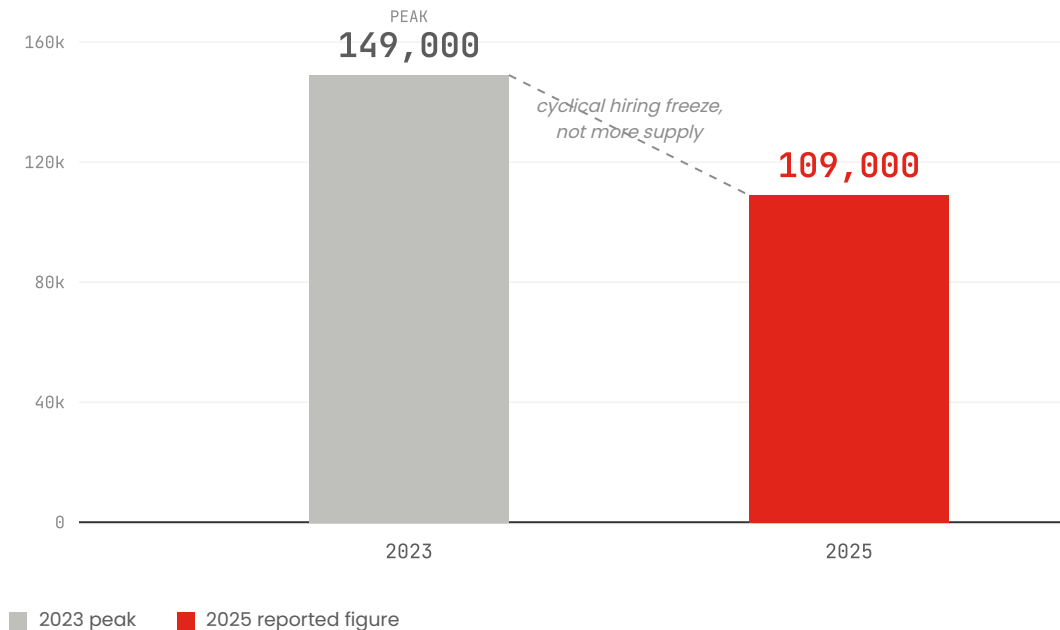
85%

of companies report a shortage of IT specialists

79%

expect the gap to widen further in the years ahead

UNFILLED IT POSITIONS IN GERMANY



What an open seat actually costs

8

Monate

Average time to fill one IT position in Germany. Eight months in which the roadmap slips, the team carries the load, and the cost of not shipping compounds quietly.

THE EMPTY-SEAT CALCULATION

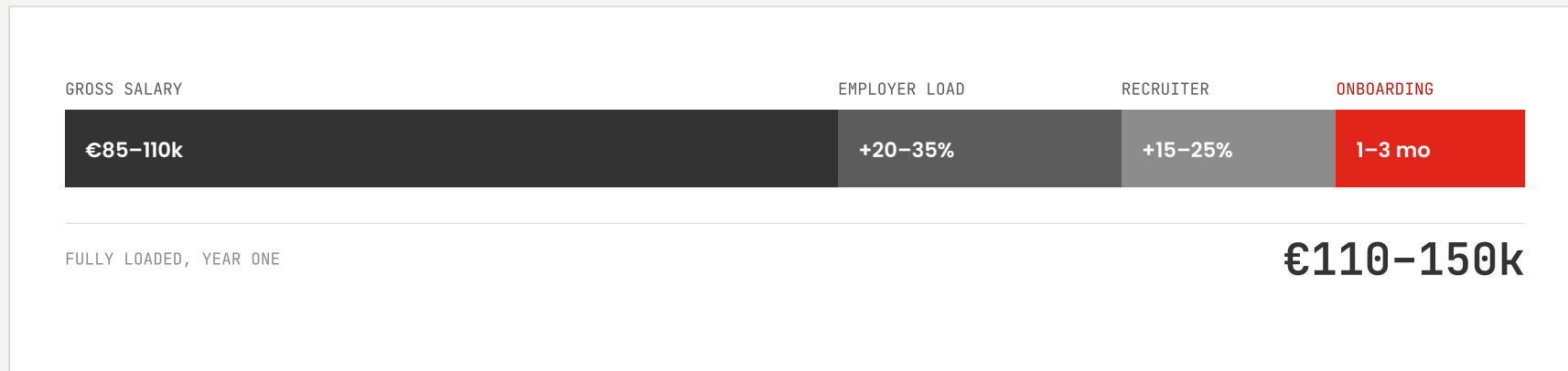
$$\begin{array}{ccccc} 8 \text{ mo} & \times & \text{€10-20k} & = & \text{€80-160k} \\ \text{time to fill} & & \text{lost output / month} & & \text{per unfilled role} \end{array}$$

This is the number rarely on the hiring business case — and it accrues before a single salary is paid.

~26% of companies receive no applications at all for their IT postings. For those roles, the recruiting funnel is not slow — it is empty.

The fully-loaded cost of one senior developer

Gross salary is the visible part. Employer contributions, recruiting fees and ramp-up time are what turn a €95k offer into a €130k line item.



Employer contributions add 20–35% on top of gross, before any variable pay.

Recruiter fees of 15–25% of first-year salary are standard for scarce senior profiles.

Onboarding costs one to three months of reduced output — paid at full rate.

Where the market is heading

The reason companies work with distributed teams has changed. A decade ago it was arbitrage. Today the decision is about access to capability that cannot be hired locally at the speed the roadmap requires.

80%

of COOs plan to increase nearshoring over the next three years — up from 63% in 2022.

70% → 34%

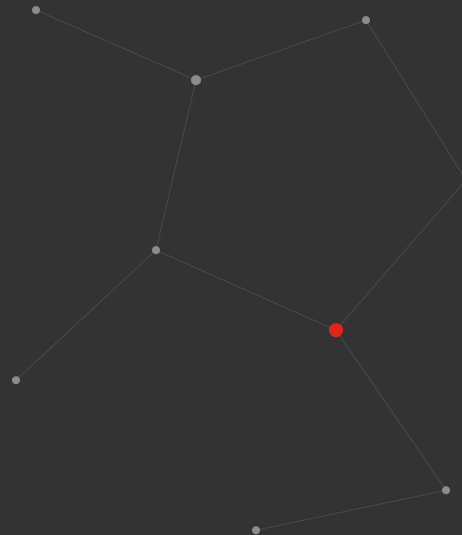
Share of companies naming cost reduction as the primary driver of outsourcing, 2020 to 2024.

Nearshoring is no longer a cost arbitrage play. It is a strategic capability decision — and it should be evaluated like one.

02

Why Istanbul

Not the lowest hourly rate on the market. The highest value per engineering hour a DACH team can coordinate within its own working day.



Five factors that decide the outcome

Each of these is examined with data on the pages that follow. Together they describe coordination cost — the variable that separates a distributed team that works from one that needs managing.

01

Full timezone overlap

UTC+3, one hour from CET.
A shared working day, not a handover window.

02

40–60% cost advantage

Versus fully-loaded German cost — with senior seniority, not junior substitution.

03

Deep talent pool

A large, young engineering supply that global firms already recruit from locally.

04

Cultural proximity

Long-standing German business ties; direct communication is the norm, not a trained skill.

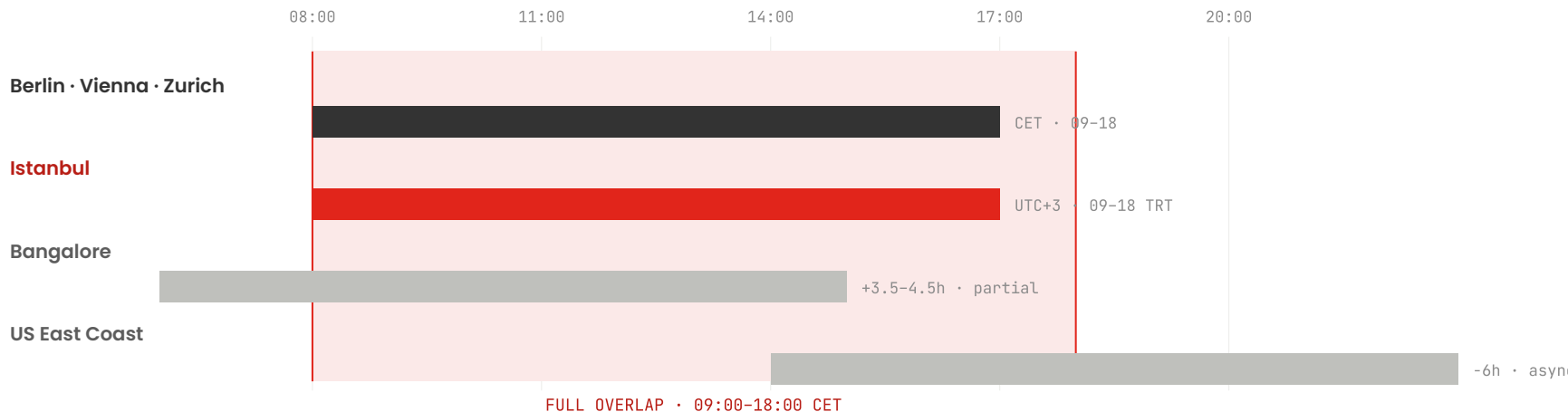
05

Three-hour flight

A workshop in Istanbul or Frankfurt is a day trip, not a travel project.

A shared working day, not a handover

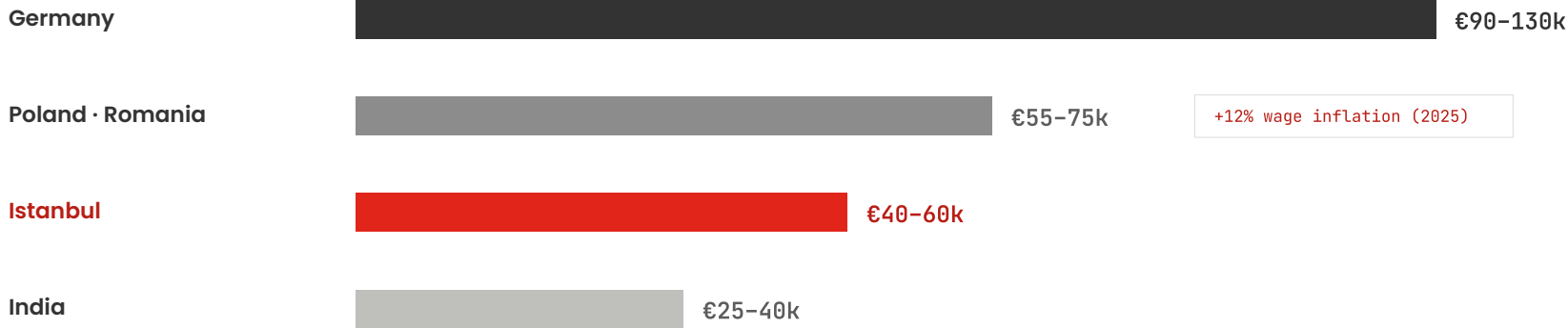
Overlap determines how a distributed team actually works. With full overlap, a blocked task is resolved in minutes. With four hours, it waits until tomorrow.



Istanbul sits one hour ahead of CET, so the standard working day maps almost exactly onto a German one — including the daily stand-up, the afternoon review and the release window.

Cost per engineer, compared honestly

Every destination on this chart delivers good engineering. They differ in price trajectory and in how much coordination each hour requires. Central Europe's advantage is narrowing under double-digit wage inflation.



FULLY-LOADED ANNUAL COST PER SENIOR ENGINEER

Senior contractor rates run €40–70/hour across Central and Eastern Europe, against €80–150/hour in Germany and the UK. The gap is real — and closing at roughly 10–12% per year in the leading CEE markets.

Offshore destinations offer the lowest base cost. What they add back is coordination: some segments report 15–20% annual attrition and 8–12% wage inflation, both of which show up as rework, not as line items.

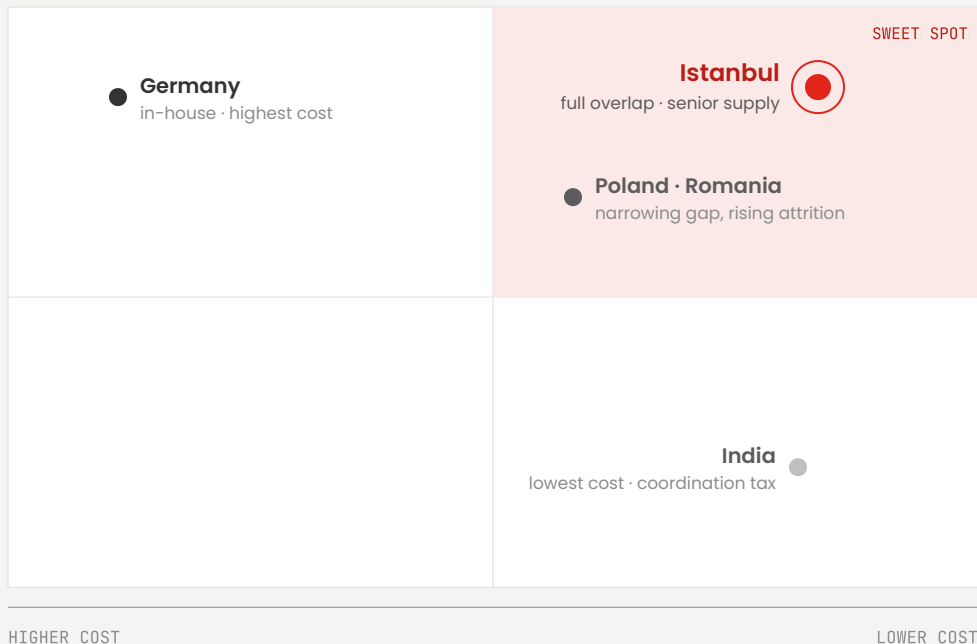
Value per hour, not price per hour

Two axes decide the outcome of a distributed team: what an hour costs, and how much effort it takes to coordinate. Optimising only the first is how outsourcing programmes disappoint.

Coordination ease here is the combined effect of timezone overlap, cultural and communication distance, and team stability. It is the axis that rarely appears in a rate card.

The objective is not the cheapest hour. It is the most delivered work per euro, inside your own working day.

COORDINATION EASE ↑



The supply side

A nearshore location is only durable if the local market can keep replacing and growing the team. Istanbul's supply is large, young and already competed for by global engineering employers.

80,000+

STEM graduates entering the market each year in Turkey.

~33

Median age — the youngest of any large European market.

50+

Universities in Istanbul feeding the local engineering market.

\$22B

Estimated value of the Istanbul startup ecosystem, 2025.

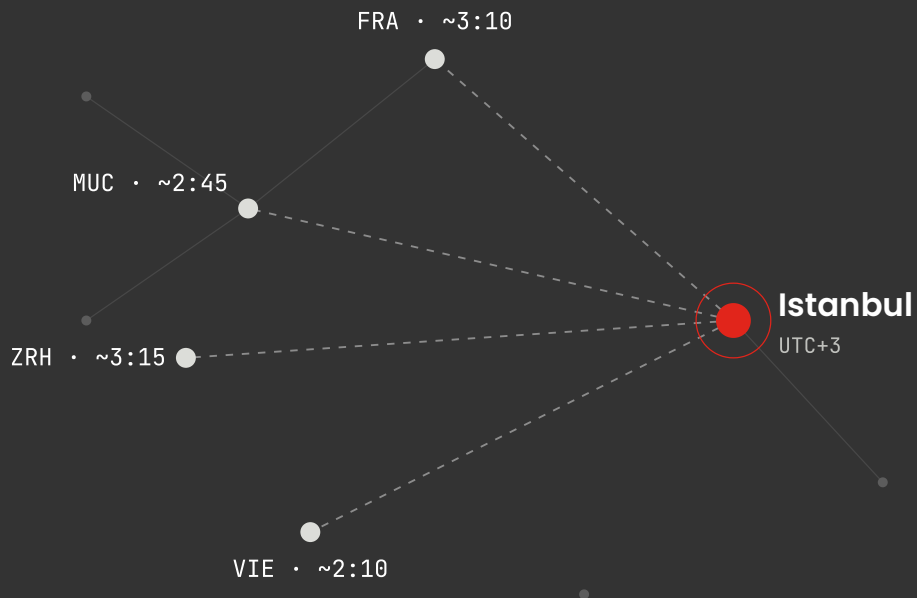
Amazon, Google and Microsoft are all growing engineering teams in Istanbul. That matters for two reasons: it validates the seniority available locally, and it sets the salary benchmark a serious nearshore partner has to meet to retain people.

Close enough to meet in person

Quarterly on-site time is what keeps a distributed team from drifting into a vendor relationship. From Istanbul, every DACH hub is a short direct flight — a workshop can be a same-day trip.

Vienna (VIE)	~2:10
Munich (MUC)	~2:45
Frankfurt (FRA)	~3:10
Zurich (ZRH)	~3:15

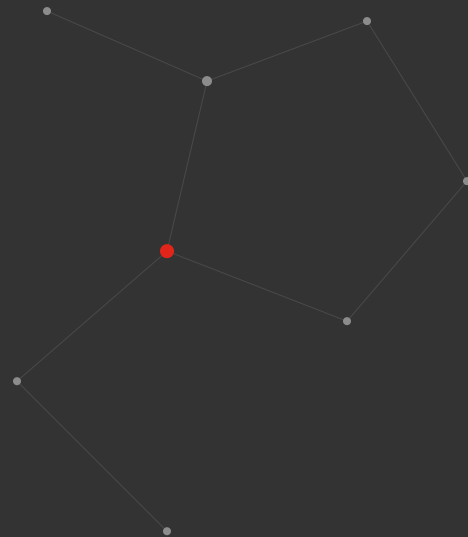
A same-day workshop is practical.



03

Compliance & Legal

Since June 2024, cross-border data transfer to Turkey follows a framework that will look familiar to any DSGVO-trained legal team.



KVKK after the 2024 reform

Law No. 7499 rewrote Article 9 of the Turkish data protection act along the structure of GDPR Chapter V. Transfers now rest on the same three tiers your legal team already applies elsewhere — the previously used route of explicit consent for routine transfers ended on 1 September 2024.

TIER 01

Adequacy decision

Transfer permitted where the destination country or sector is recognised as adequate.

TIER 02 • THE ROUTE IN PRACTICE

Appropriate safeguards

Turkish standard contractual clauses or binding corporate rules — the mechanism used for ongoing engineering engagements.

TIER 03

Exceptional cases

Narrow, case-by-case derogations — not a basis for continuous operations.

TIMELINE

Law 7499



enacted

1 Jun 2024

in force

1 Sep 2024

consent route ends

5 working days

Notification to the authority after signing standard contractual clauses. The template text is used unmodified — a predictable, documented process.

One caution worth stating plainly: GDPR compliance does not automatically produce KVKK compliance. Both regimes apply, and the right partner administers both rather than leaving the second to your legal department.

The safeguards to require in writing

Four items settle most of the risk conversation. Each belongs in the contract, not in a capability deck.

01

ISO 27001 — check the scope

A certificate is only as meaningful as its scope statement. Confirm that it covers the delivery locations, the teams and the systems your project will actually run on — not just corporate IT.

02

EU data residency

Production data can remain in the EU — Azure West Europe or AWS Frankfurt — while the engineering team works from Istanbul. Residency and location of work are separate decisions.

03

IP assignment, NDA and escrow

Full assignment of work product on payment, mutual NDAs covering named personnel, and source escrow where business continuity requires it.

04

Sub-processor transparency

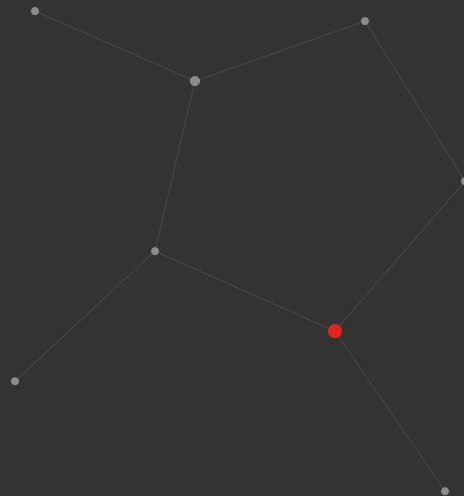
A current list of sub-processors, notice before changes, and the right to object. If a provider cannot produce the list quickly, that is the answer.

German legal entity available — contracts under German law, if preferred. For many DACH legal teams this removes the largest single objection before the technical evaluation even begins.

04

Operating Model & Next Steps

How the engagement is structured, what to screen every provider for, and a first step small enough to reverse.



Two engagement models

The choice follows the work, not the budget line. Continuous product development and a bounded delivery need different governance.

DIMENSION	Dedicated Team	Project-Based
Shape	4–12 engineers embedded in your organisation, working to your backlog	A defined scope with agreed acceptance criteria and a delivery date
Horizon	12 months and beyond — the team is an extension of yours	Weeks to months, ending at handover
Governance	Your rituals, your roadmap; we supply engineering management and architecture oversight	We own delivery management against the agreed scope and report against milestones
Best fit when	The work is continuous and domain knowledge compounds — platform, product, long-lived systems	The outcome is well specified and self-contained — a migration, an integration, a rebuild

Ask every provider these questions — including us.

Five signals separate an engineering partner from a staffing intermediary. Use this list on your whole shortlist; a provider confident in its answers will not mind.

☐

What was your engineer attrition rate last year?

Above 25% means you will be re-onboarding continuously, and paying for it in context loss.

☐

Do you operate your own engineering centre?

Without one, the "team" may be assembled per contract from freelancers you never meet twice.

☐

Can we speak to a reference client in our sector?

Reluctance here is rarely about confidentiality.

☐

Will you commit to anything beyond time and materials?

A partner that never accepts outcome accountability is selling capacity, not delivery.

☐

Who owns architectural governance?

If the answer is "your architects", you have bought hands — and inherited the technical debt.

A first step small enough to reverse

No full outsourcing decision is required to start. Three phases, each with its own exit point — the pilot either earns the next phase or it does not.

Discovery

PHASE 01

2–3 weeks

Architecture and backlog review;
a written assessment and a scoped pilot

Pilot

PHASE 02

3 months

A real, shippable slice of work with
your rituals and measurable output

Scale

PHASE 03

ongoing

Team grows against the roadmap;
governance and architecture ownership stay explicit

THE HIDDEN COSTS THIS AVOIDS — COMPARE AGAINST YOUR LOCAL HIRING CASE

15–25%

recruiter fee on first-year salary

20–35%

employer contributions on gross

1–3 mo

onboarding at reduced output

€10–20k

lost output per month of empty seat

Ready to see where you stand?

Book a 30-minute nearshore readiness assessment — structured, specific, no sales pitch. We review your current constraints and tell you plainly whether a nearshore team helps.

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engineers

300+

projects

5×

Deloitte Fast 50

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SOURCES

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2. Bain & Company, CIO nearshoring survey, via 2024-2026 coverage
3. Deloitte, Global Outsourcing Survey — cost-driver trend 2020-2024
4. HighCircl, "Cost to hire a senior developer in Europe", 2026
5. SearchQualify / Poland Insight, EU developer salary benchmarks 2026 (PL +12% YoY)
6. KVKK Law No. 7499 amendment & Cross-Border Transfer Regulation, Jul 2024; IAPP analysis
7. Turkish Investment Office ICT data; Istanbul ecosystem valuation 2025
8. Bitkom Research 2025 — vacancy duration ~8 months, n=855

All third-party findings are summarised in our own words; every chart in this document was drawn from the cited figures.

