



TELEKOMS MARKET DEVELOPMENT EXPERIENCES of TURKEY

**İhsan KULALI, PhD.
Board Member**

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Agenda

- About ICTA
- Electronic communications market indicators
- Some important regulatory developments

The duties of the Authority– 1

- Creation and maintaining the competition in the sector
- Protecting the rights of consumers
- Carrying out dispute resolution procedures between operators
- Tracking the developments and stimulating the development of the electronic communications sector
- Detection and elimination of electromagnetic interference
- Approval and supervision of the tariffs

The duties of the Authority– 2

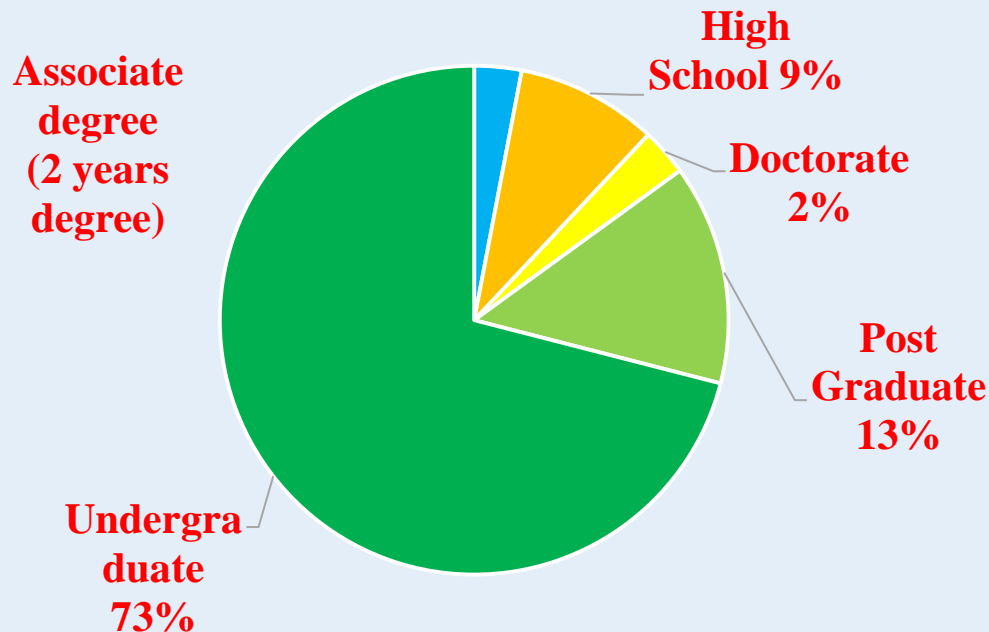
- Approve the reference access offers submitted by the operators
- Ensuring publication and implementation of the harmonized national standards for all kinds of systems and equipment
- Conducting frequency planning, allocation and registration procedures.
- Carrying out the duties related to the Electronic Signature
- Regulating the postal sector

Human Resources

As of March, 2015; 812 personnel in total;

- Headquarter: 637
- Regional Directorates (7 Regional Directorates): 175

Distribution of the Personnel due to Their Graduation Levels



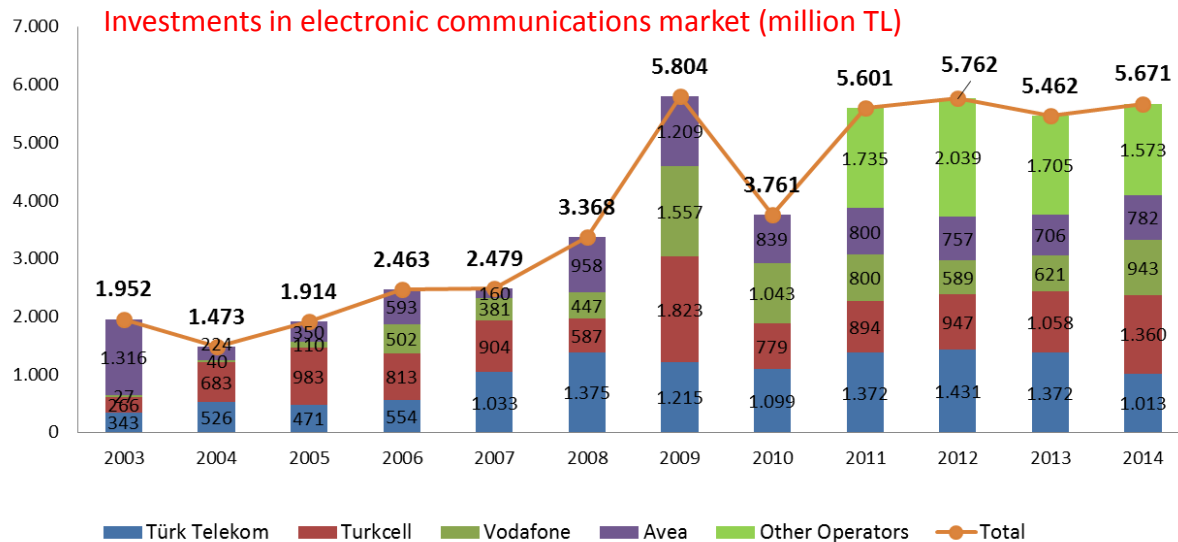
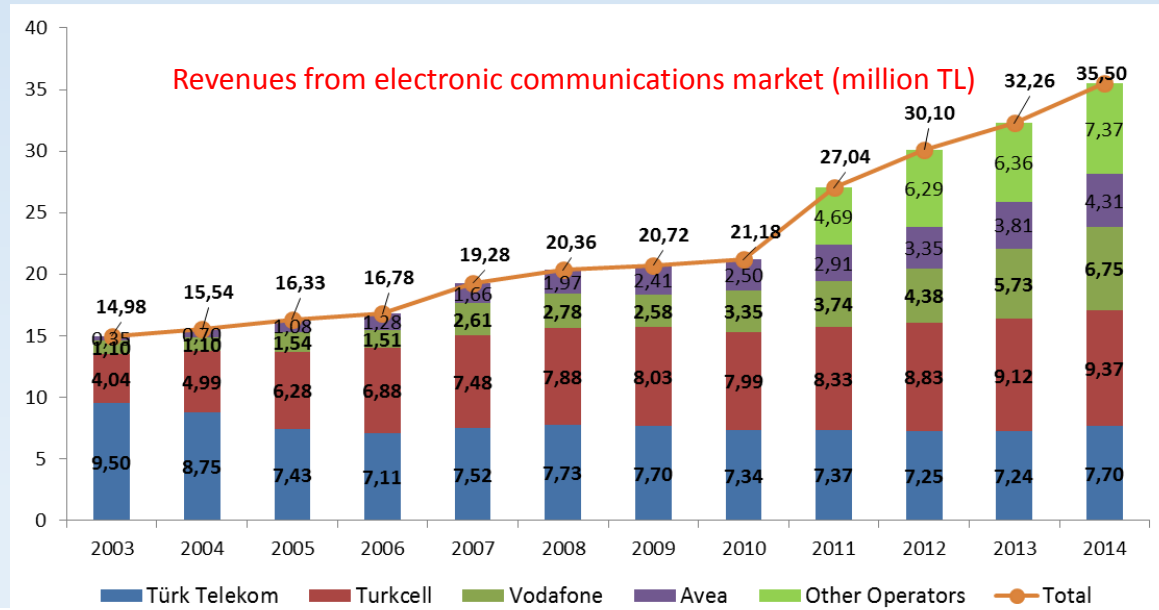
MARKET INDICATORS

Number of Authorizations



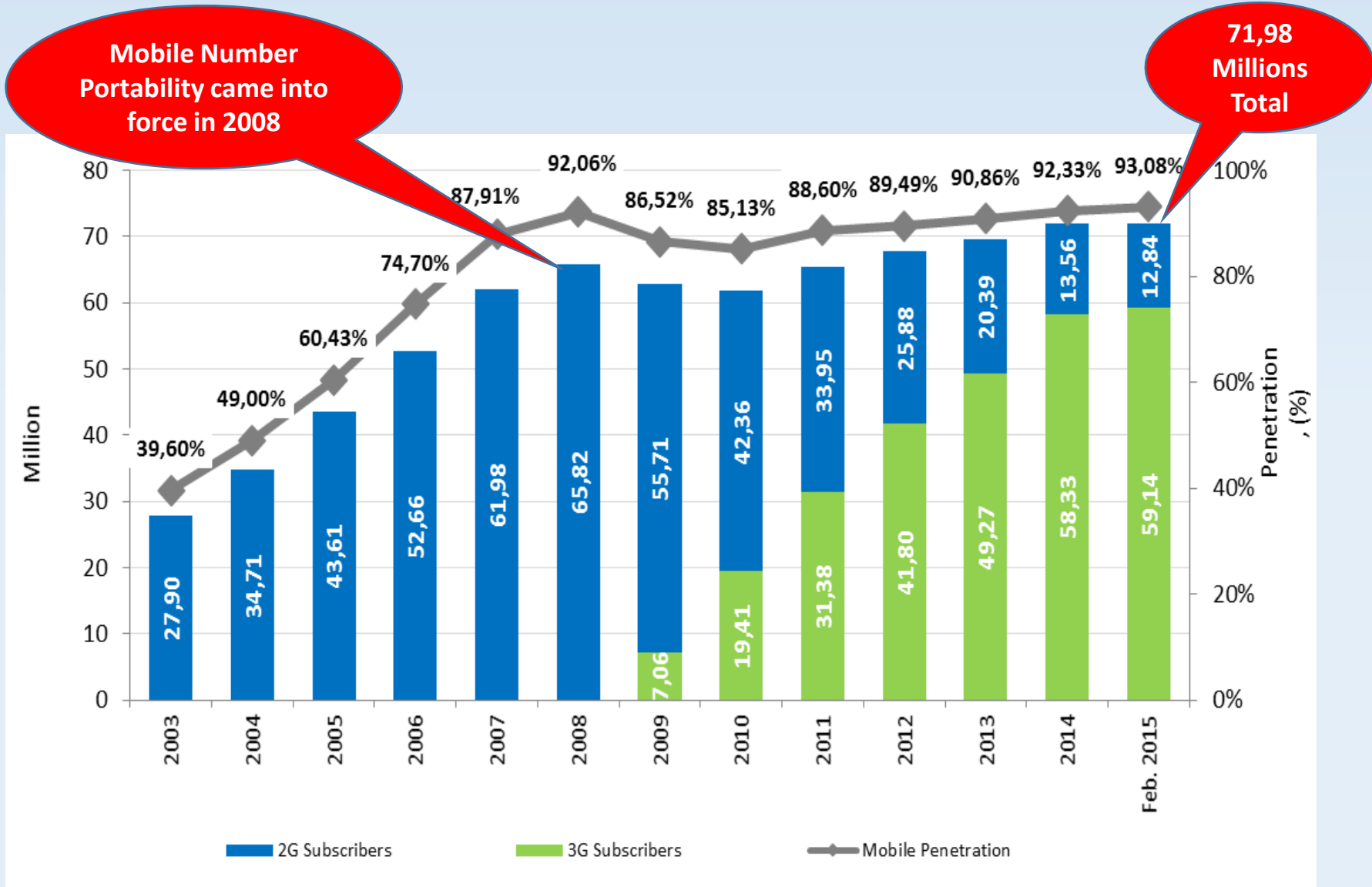
Type of Authorizations	Number of Authorizations
Various Telecommunications Services (Concession Agreement)	1
GSM and UMTS Operators	3 GSM and 3 UMTS
Infrastructure Operating Services	159
GMPCS Mobile Telephony Services	13
GSM 1800 Mobile Telephony Services on Board Aircraft	4
Internet Service Providers	371
Cable Broadcasting Services	25
Public Access Mobile Radio Services	82
Directory Enquiry Services	10
Fixed Telephony Services	198
Mobile Virtual Network Operators	90
Satellite Communication Services	39
Satellite Platform Services	19
Satellite and Cable TV Services	1

Revenues from and Investments in Telecommunication Services

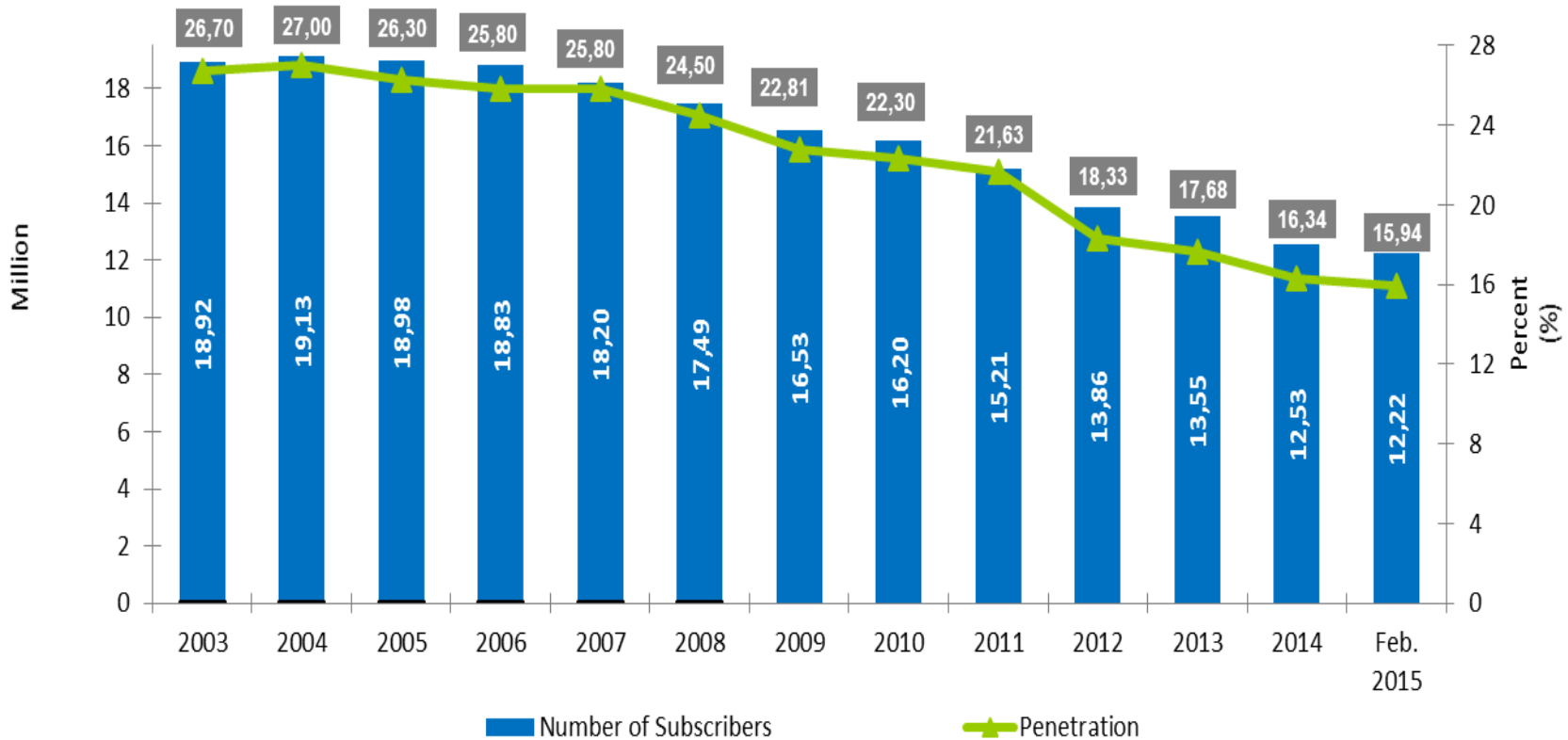


* Other: Operators other than Türk Telekom and Mobile Operators

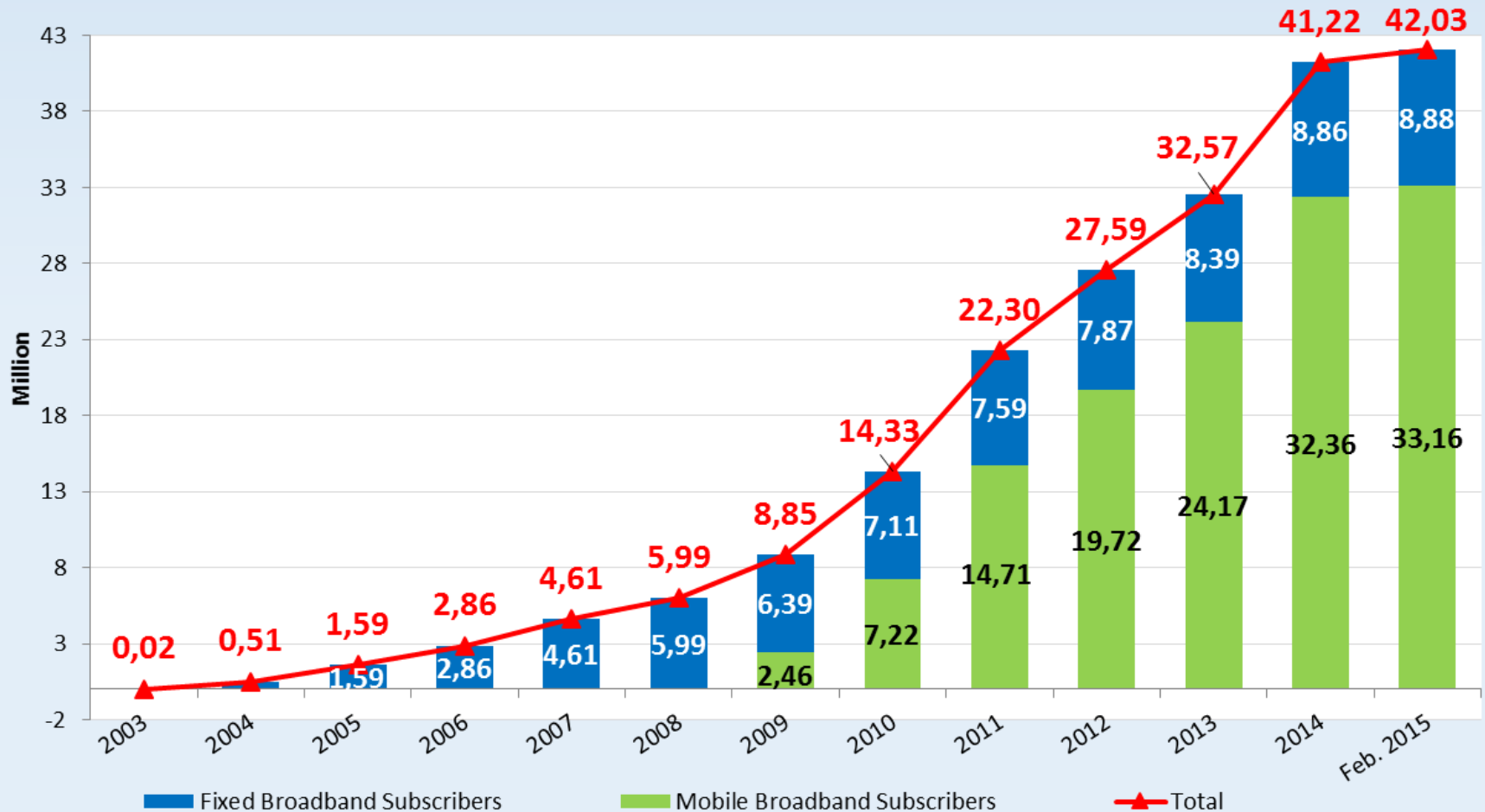
Number of Mobile Subscribers and Penetration Rate



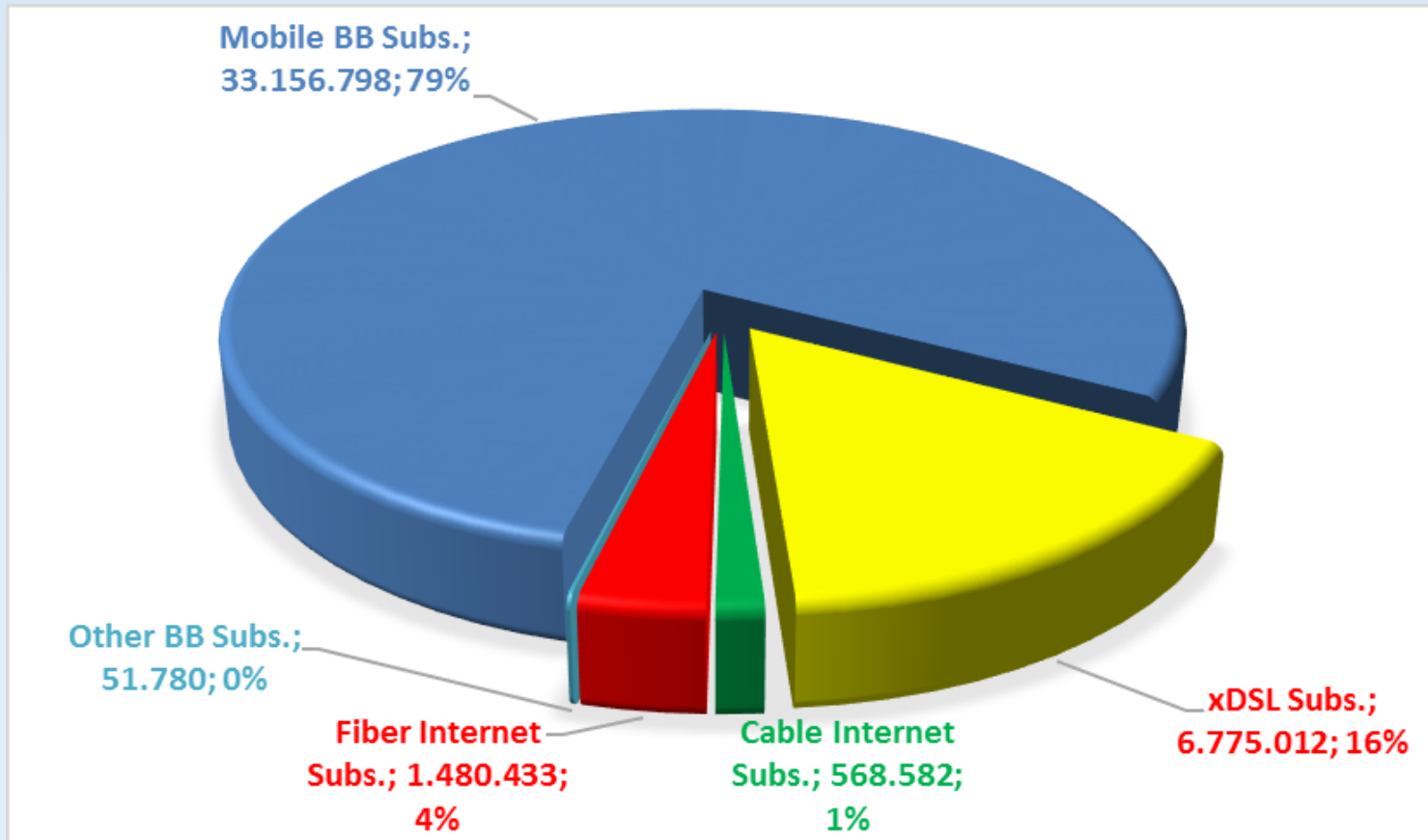
Fixed-Line Subscribers and Penetration Rate



Number of Broadband Subscribers

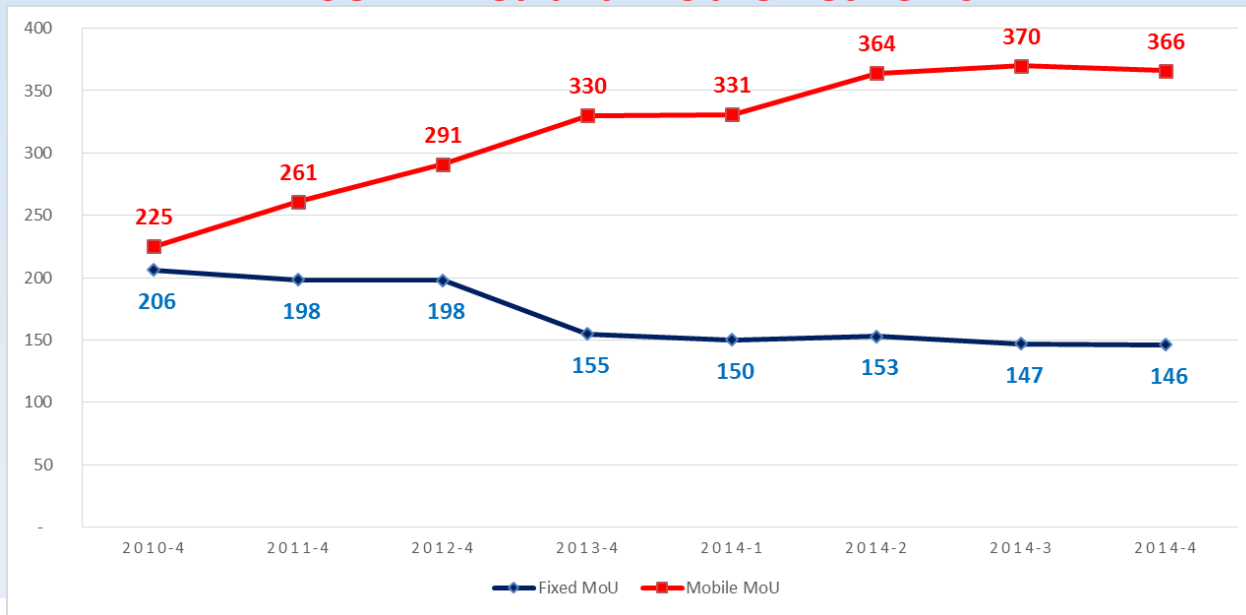


Broadband Subscriptions by Technology

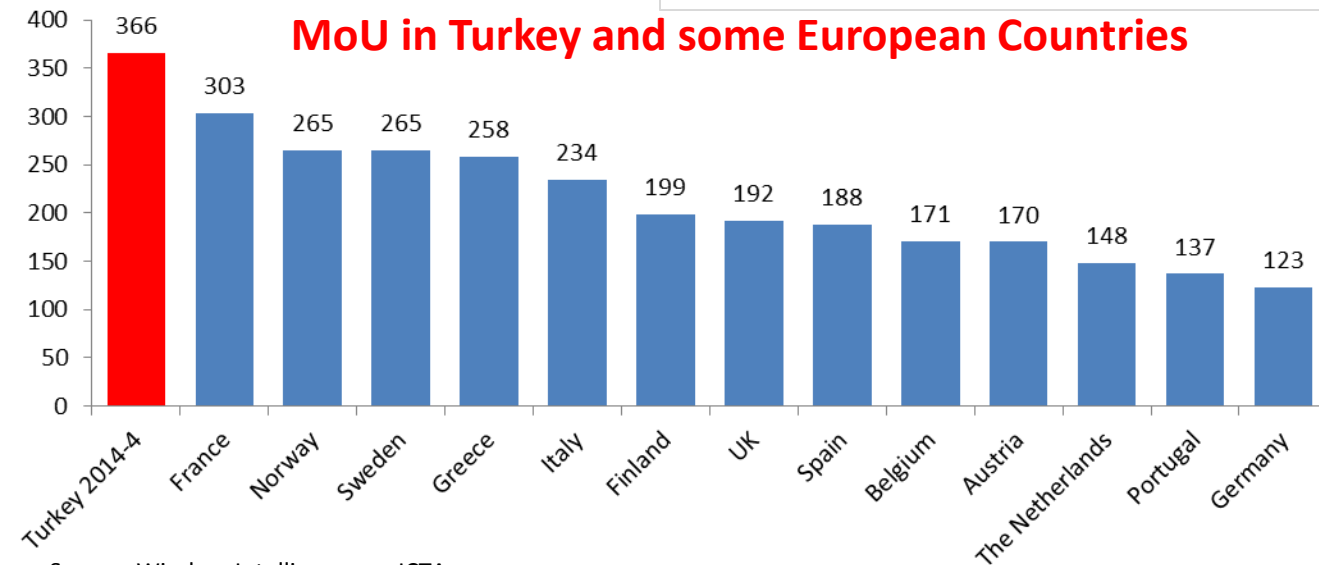


Fixed and Mobile MoU (Minutes per User/Month)

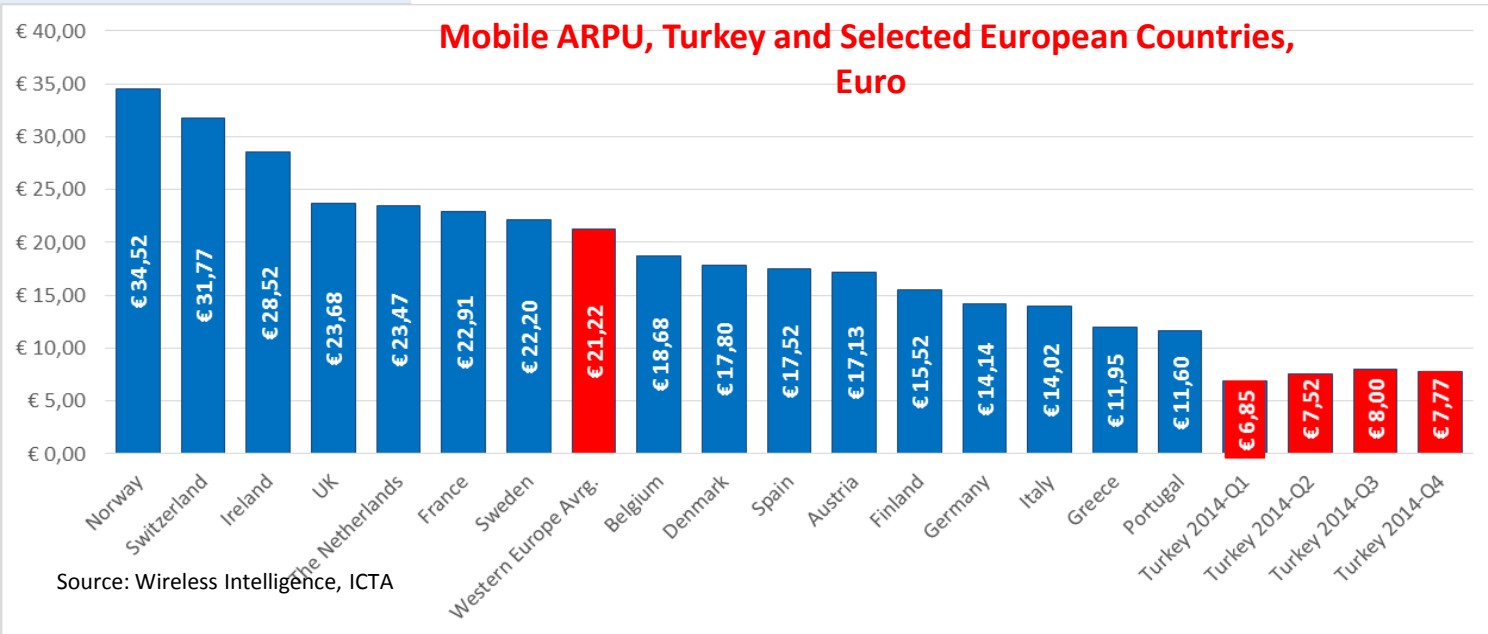
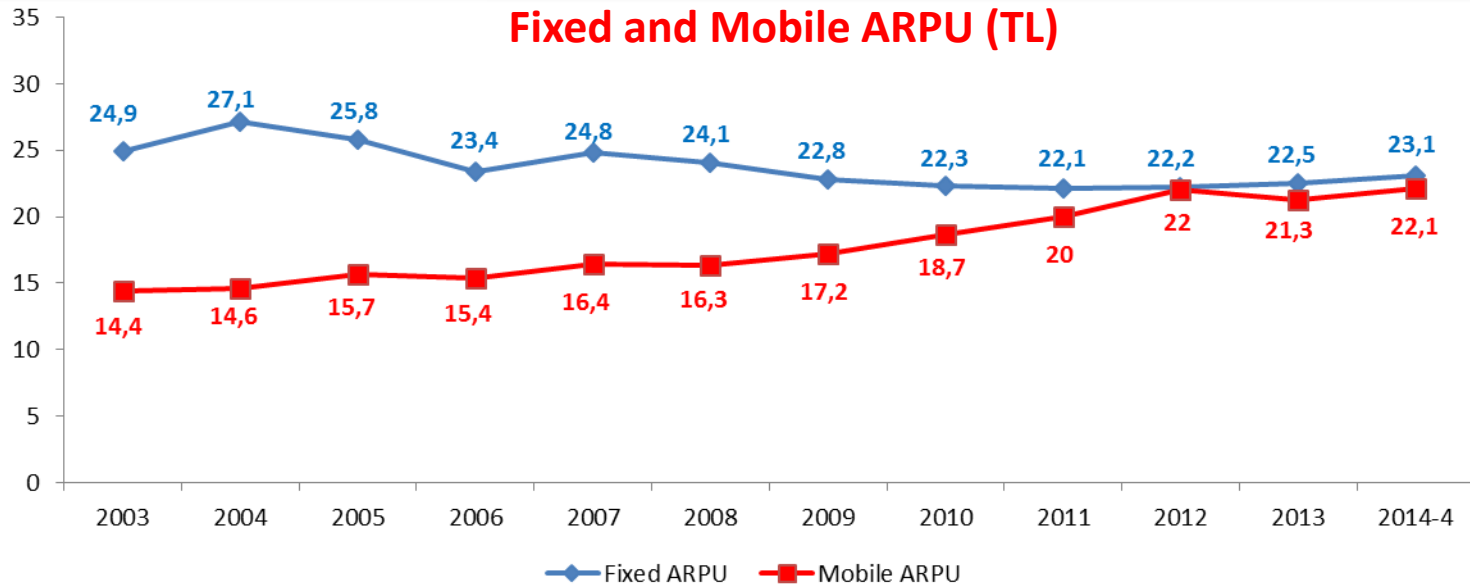
MoU in Fixed and Mobile Networks



MoU in Turkey and some European Countries

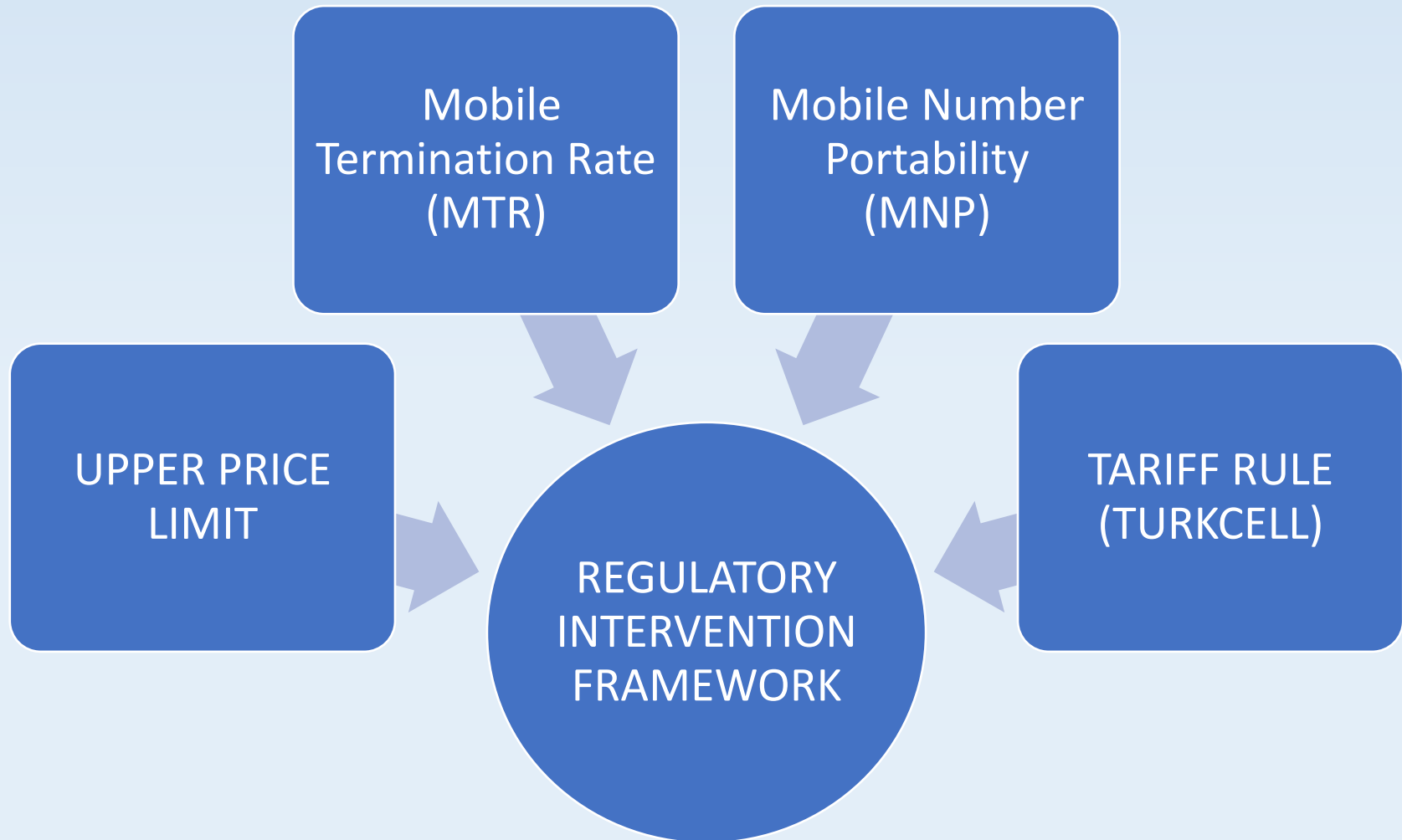


Fixed and Mobile ARPU (Average Revenue per User)



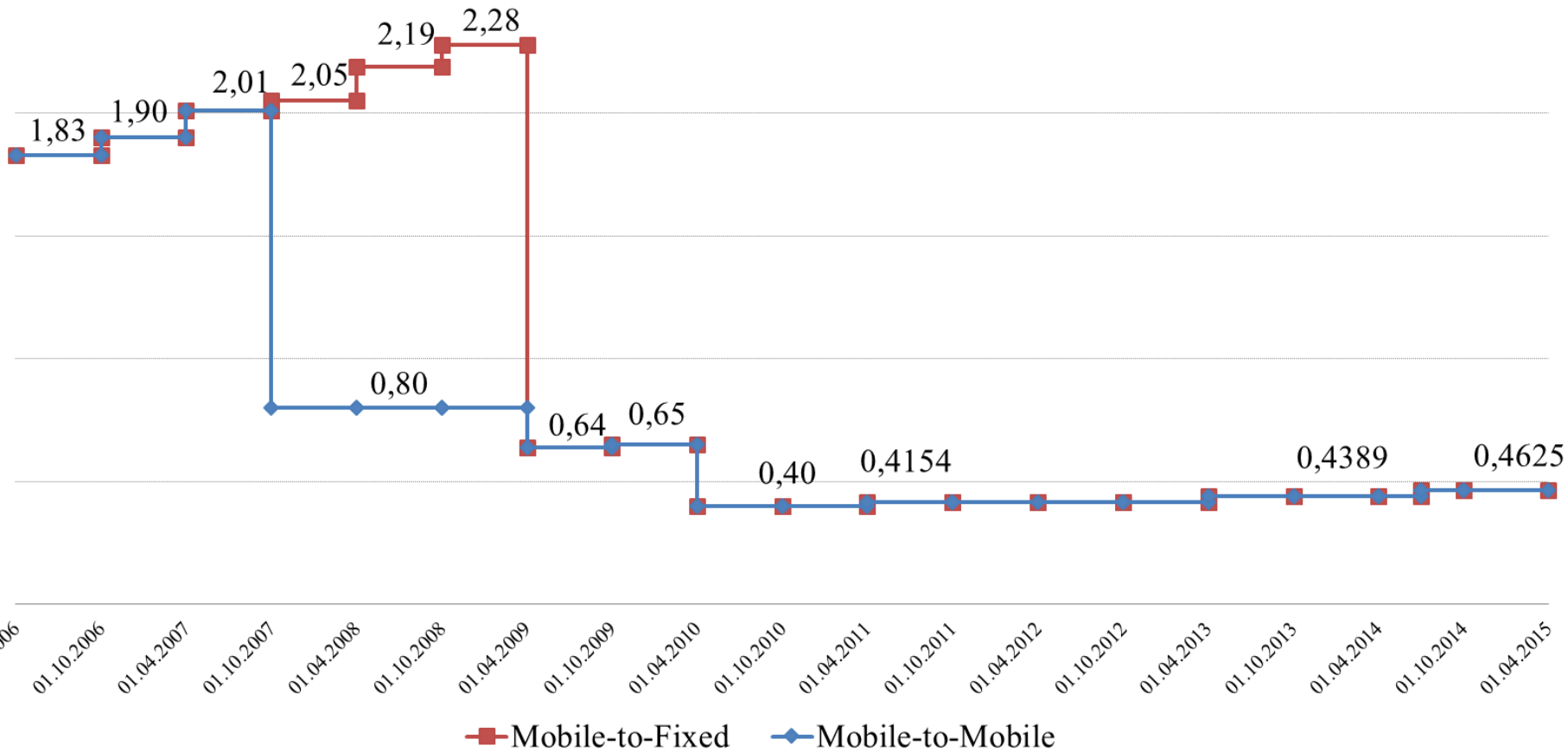
IMPORTANT REGULATORY DEVELOPMENTS

Mobile Regulatory Intervention Framework (2007-...)



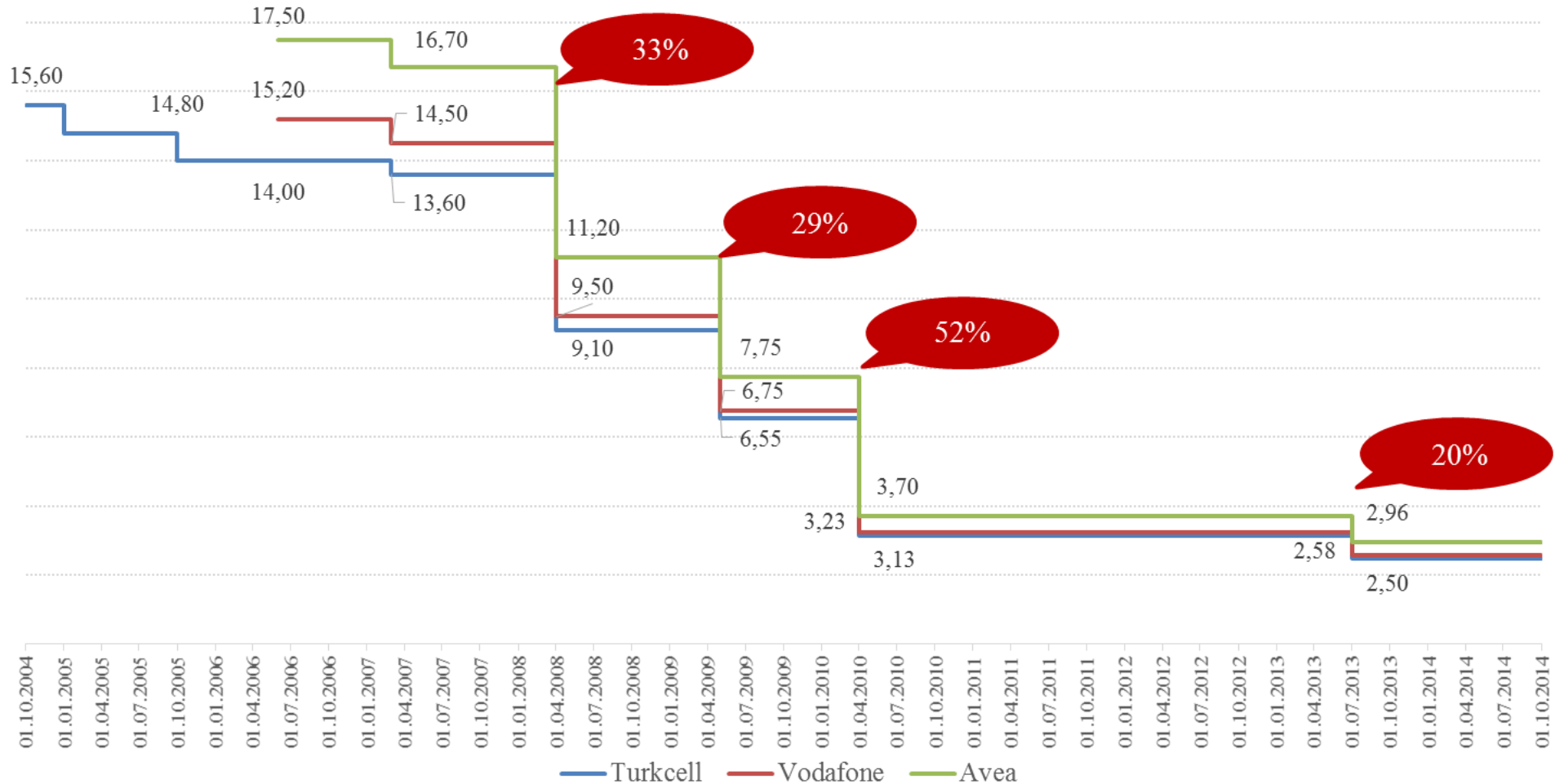
Mobile Regulatory Intervention Framework (2007-...)

Upper Price Limit (TL/min)



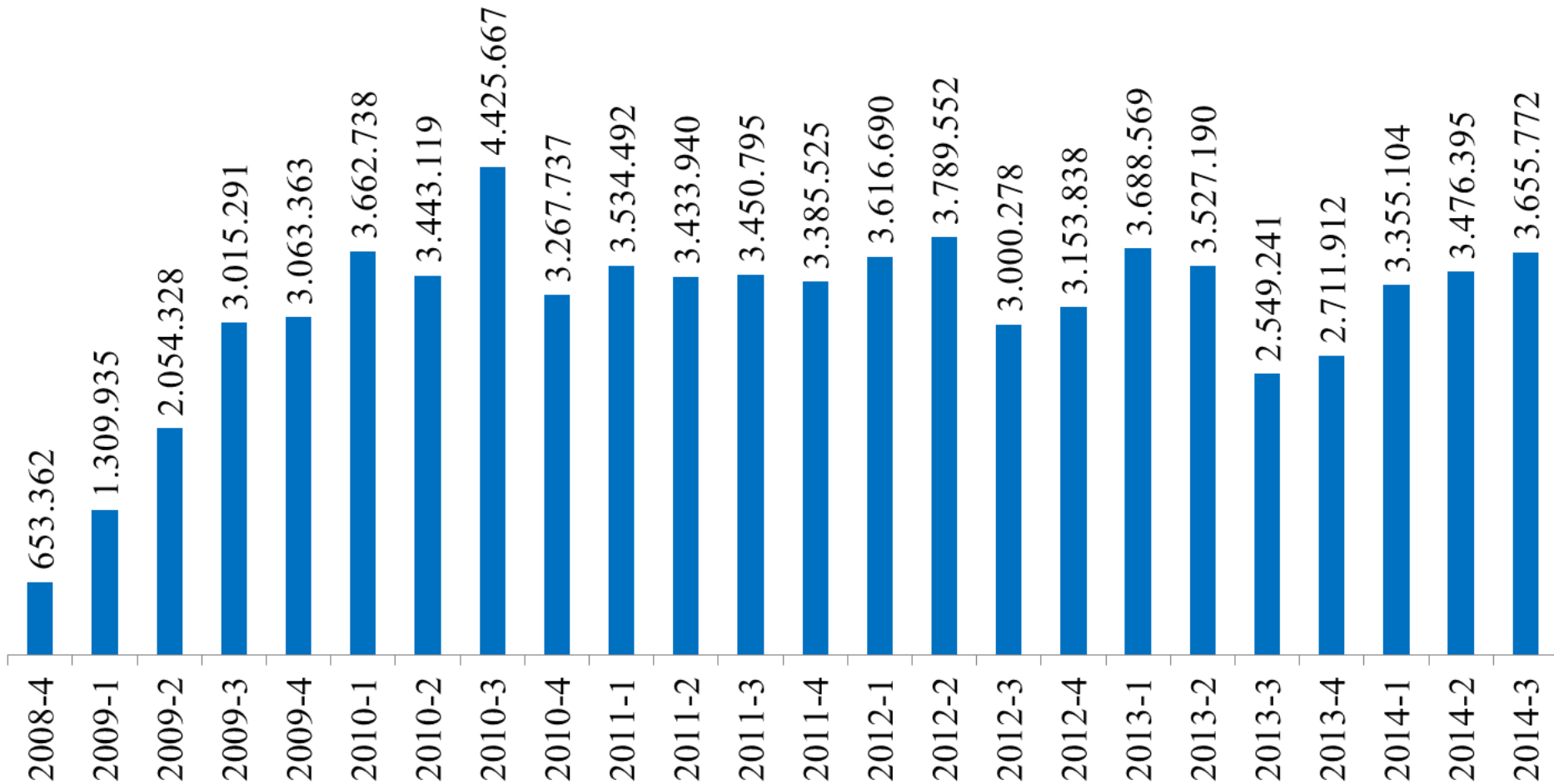
Mobile Regulatory Intervention Framework (2007-...)

Mobile Termination Rate (Kr/min)



Mobile Regulatory Intervention Framework (2007-...)

Mobile Number Portability Transactions per quarter



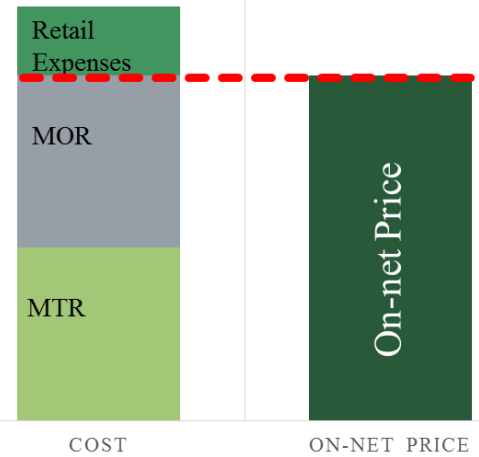
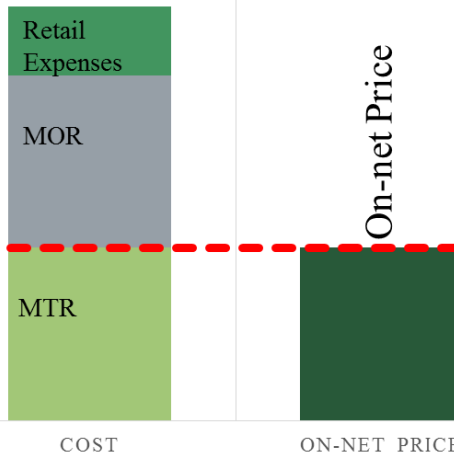
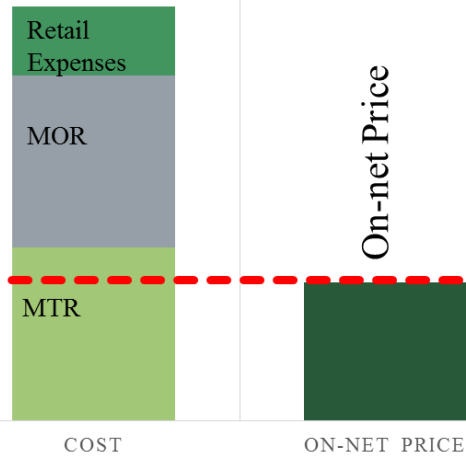
Mobile Regulatory Intervention Framework (2007-...)

Tariff Rule (Turkcell)

Competition Issue

2009 Rule

2013 Rule



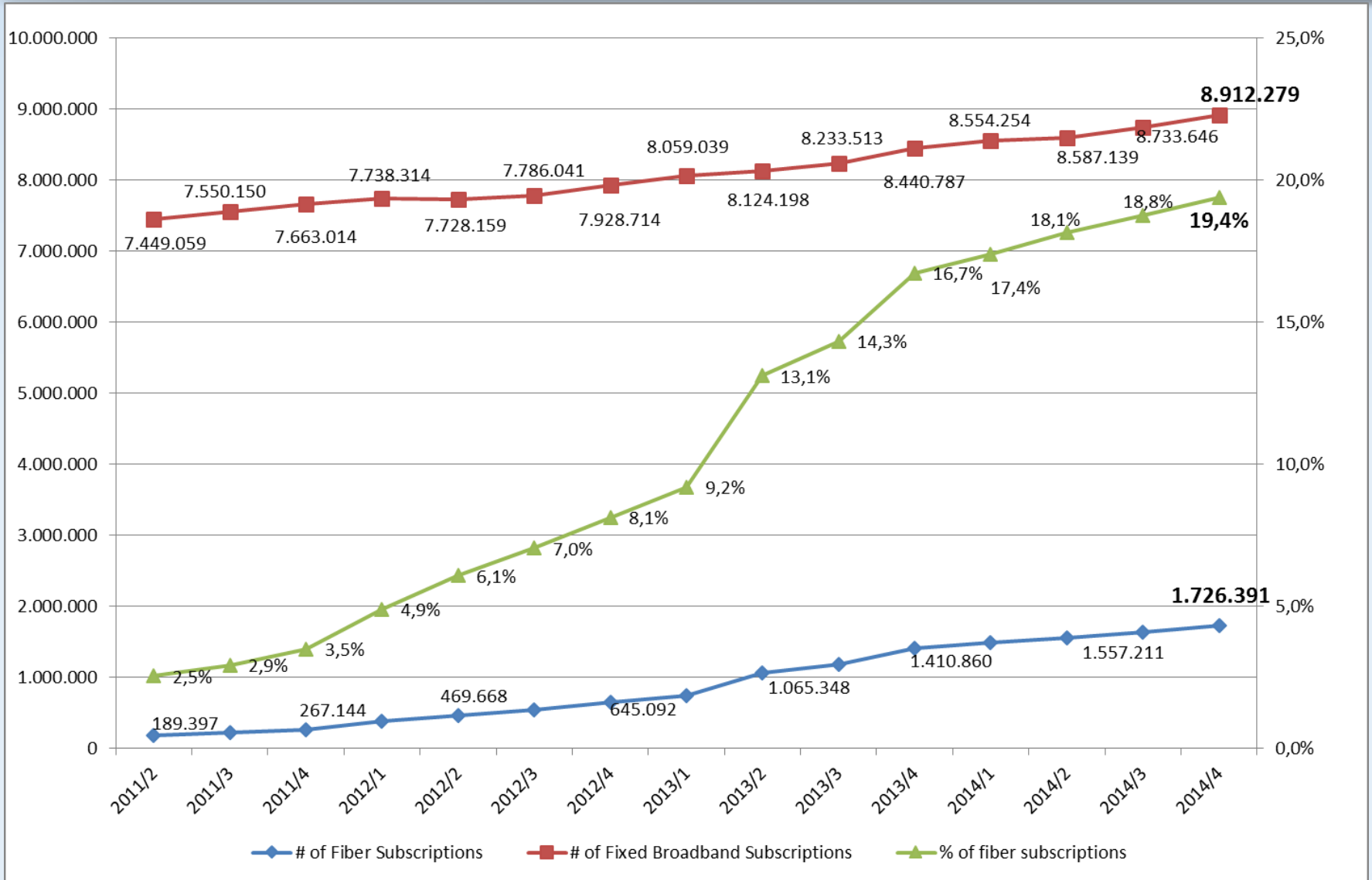
Fiber Access Exemption Decision

Fiber Access Exemption Decision in 2011;

- Fibre access (FTTH/FTTB) is excluded from market analyses process for the five year period or until the percentage of fibre internet subscribers reaches the 25% of the whole fixed broadband subscribers, and



Fiber Access Exemption Decision



4G Authorizations

- **4G auctions scheduled to be held on May 26, 2015.**
- The frequencies will be auctioned in 800 MHz, 900 MHz, 1800 MHz, 2100 MHz and 2600 MHz frequency bands.
- **A total of 390 MHz frequency band will be auctioned to 3 mobile operators and a new entrant.**
- One of the 10 MHz in 2600 MHz frequency band reserved for a new entrant.
- **The minimum value of the total frequencies is 2,3 billion Euros**
- The services are envisaged to be operational from the first day of 2016.



Frequency band (20 Blocks)	Bandwidth (MHz)	Min. Value (Euro)
800 MHz FDD	2x10	372.926.013
800 MHz FDD	2x10	372.926.013
800 MHz FDD	2x10	372.926.013
900 MHz FDD	2x7,6	216.819.184
900 MHz FDD	2x1,4	39.940.376
900 MHz FDD	2x1,4	39.940.376
1800 MHz FDD	2x29,8	283.411.778
1800 MHz FDD	2x20	190.209.247
1800 MHz FDD	2x10	95.104.623
2100 MHz FDD	2x5	35.664.234
2100 MHz FDD	2x5	35.664.234
2100 MHz TDD	1x10	35.664.234
2600 MHz FDD	2x25	64.647.293
2600 MHz FDD	2x15	38.788.376
2600 MHz FDD	2x10	25.858.917
2600 MHz FDD	2x10	25.858.917
2600 MHz TDD	1x15	19.394.188
2600 MHz TDD	1x10	12.929.459
2600 MHz TDD	1x10	12.929.459
2600 MHz TDD	1x5	6.464.729

A decorative graphic consisting of a blue rectangular bar on top and a red rectangular bar on the bottom, both with a slight shadow. The blue bar contains the text "Thank you for your attention." in white. The red bar is empty. To the left of the blue bar, there is a dark blue L-shaped graphic element.

Thank you for your attention.