

TÜRKİYE ELECTRONIC COMMUNICATION SECTOR

Quarterly Market Data Report



INFORMATION AND
COMMUNICATION
TECHNOLOGIES
AUTHORITY

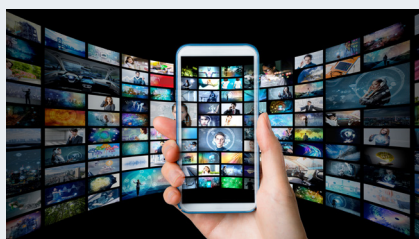
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PREFACE

In the world, which is almost shrinking with developing communication and transportation opportunities, the importance of global collaborations is increasing. In May, BTK hosted important international organizations. Doreen Bogdan-Martin, Secretary General of the International Telecommunication Union (ITU), the specialized organization of the United Nations in the field of information and communication technologies, of which our country is among the founding members, paid an official visit to our country. During the meetings held on the visit, many strategic topics regarding the present and future of information and communication technologies, especially telecommunications, artificial intelligence, cyber security, 5G/6G technologies and digital transformation, were discussed. Later, the 15th International Electronic Communications and Postal Regulators Conference was held in the BTK building with the theme of “Digital Future: Transformation of the Electronic Communications and Postal Sectors.” More than 250 participants from 22 different countries came together at the conference. We hope that the conference was beneficial for our postal and electronic communication sector.

As an institution, we occasionally introduce innovations in our reports in order to diversify the data we share about the sector over the years. In this context, starting from this period, we are beginning to share various information with the public regarding Internet usage habits in our country.

The summary of this report, which includes market data in the electronic communications sector as of first quarter of 2025, is as follows:

- The total net sales revenues of the operators in the sector exceeded ₺127,2 billion in the first quarter of 2025.
- During this period, the number of fixed telephony subscribers was 8.9 million and the number of mobile subscribers was

approximately 95 million. While the mobile penetration rate was 110.9%, when we exclude the number of machine-to-machine communication (M2M) subscribers and the population aged 0-9, the mobile penetration rate is 113.5%. In the first quarter of 2025, Türkiye ranked first among the European countries that could be examined, as in the previous period, with an average monthly mobile usage time of 455 minutes. During this period, approximately 3 million mobile subscribers transferred their numbers, and the total number of mobile numbers transferred until March 31, 2025 was approximately 193 million.

- When broadband data is examined, a total of 96 million broadband internet subscribers have been reached, 20.7 million of which are fixed subscribers and 75.3 million are mobile subscribers, and the number of internet subscribers has increased by 1.9% compared to the same period of the previous year. The highest increase was in the number of “Wireless Internet (Fixed)” subscribers with a rate of 44.8%, followed by the number of “Fiber to the Home” subscribers with a rate of 23.1%. The average monthly data usage of fixed broadband subscribers in this quarter was 288.3 GBytes.
- The number of subscribers to the 4.5G service, which started to be used in our country on April 1, 2016, was approximately 88.2 million by the end of March 2025. However, due to the fact that the devices or SIM cards of some of our citizens are not compatible with the 4.5G service, the number of those who can actively use this service was approximately 74.6 million. The average monthly usage of mobile broadband internet subscribers was 16.7 GBytes.
- Length of fiber infrastructure, which was approximately 568 thousand km in the same period of the previous year, is approximately 618 thousand km in the first quarter of 2025, an increase of 8.8%.

I present this Report, which includes the developments in our electronic communications sector and sectoral data, to the public, and I wish the new year to be successful for our sector and our country.

Kind Regards

Ömer Abdullah KARAGÖZOĞLU
Chairman of the Board



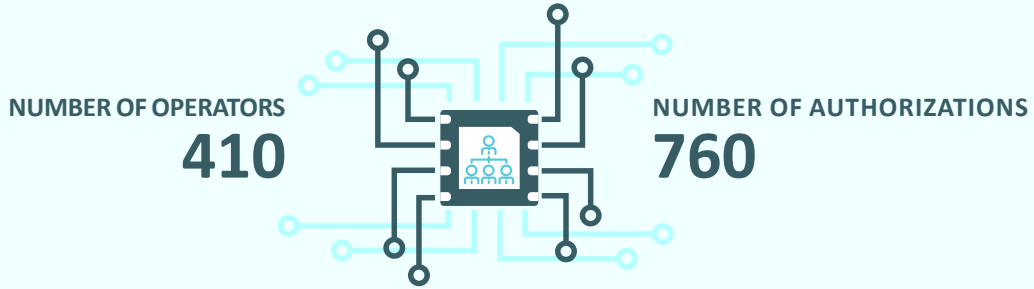
EXECUTIVE SUMMARY 2025-1. KEY FINDINGS

The developments in the Turkish electronic communications market as of the end of the first quarter (January-February-March) of 2025 are summarized below. ¹

¹ The figures in this report have been rounded to one digit after the decimal point. Due to rounding, some graphs in the report, such as market share information, may not add up to exactly 100%. The data and statistical analyses in this report, prepared for statistical purposes, may be revised periodically due to method changes and corrections originating from operators.

General Market Data

By the end of the Q1 of 2025, the number of operators operating in the electronic communications sector was **410** and the number of authorizations granted to these operators was **760**



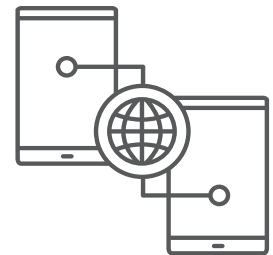
In Q1 2025, the total net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were approximately **₺98 billion**, while the total net sales revenues of other operators in the same period were **₺29.3 billion**.



In Q1 2025, the total investment amount of TT Mobil, Turkcell, Türk Telekom and Vodafone was **₺15.7 billion**,

while other operators invested **₺3 billion** in the same period.

In Q1 2025, the total amount of mobile traffic was **73.9 billion minutes**, while the amount of fixed traffic was approximately **1.2 billion minutes**. Compared to the previous quarter, the amount of mobile traffic decreased by **5.1%** and the amount of fixed traffic decreased by **14.7%**. The majority of the traffic (**95.6%**) was mobile to mobile.



In Q1 2025, a total of **45,211** complaints were received by BTK from consumers, and approximately **48.7%** of these complaints were related to internet service providers. When the number of consumer complaints per million subscribers is examined, the top three complaints are internet service providers, satellite platform services and cable TV services.

Fixed Market

In Q1 2025, Türkiye had approximately **8.90 million** fixed telephony subscribers, corresponding to a penetration rate of around **10.4%**.

In the first quarter of 2025, the share of on-net traffic within the total traffic volume The share of traffic directed to mobile within the total traffic volume in the first quarter of 2025.

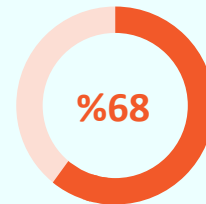
Türk Telekom's fixed telephony revenues amounted to approximately **₺2.508 billion** in Q1 2025, marking an increase of **39.2%** compared to the same period of the previous year and a **0.9%** increase compared to the preceding quarter.

Approximately **5.7 million** subscribers received fixed telephony services from alternative operators, with these operators generating revenues of about **₺2.8 billion** from all fixed telephony services in the first quarter of 2025.

Analyzing Türk Telekom's traffic distribution reveals that the share of on-network traffic, which was **23.6%** in the same period of the previous year, stood at **19.1%** in Q1 2025. Meanwhile, mobile-terminated traffic, which accounted for **68%** of total traffic in the previous year's same period, rose to **72.8%** in Q1 2025.



In the first quarter of 2025, the share of on-net traffic within the total traffic volume



The share of traffic directed to mobile within the total traffic volume in the first quarter of 2025

Türk Telekom's voice traffic, declined from approximately **425 million** minutes in Q1 2024 to **389 million** minutes in Q1 2025.

In local call traffic, alternative fixed telephony operators held a share of 29.3% share, while Turk Telekom accounted for 70.7%.

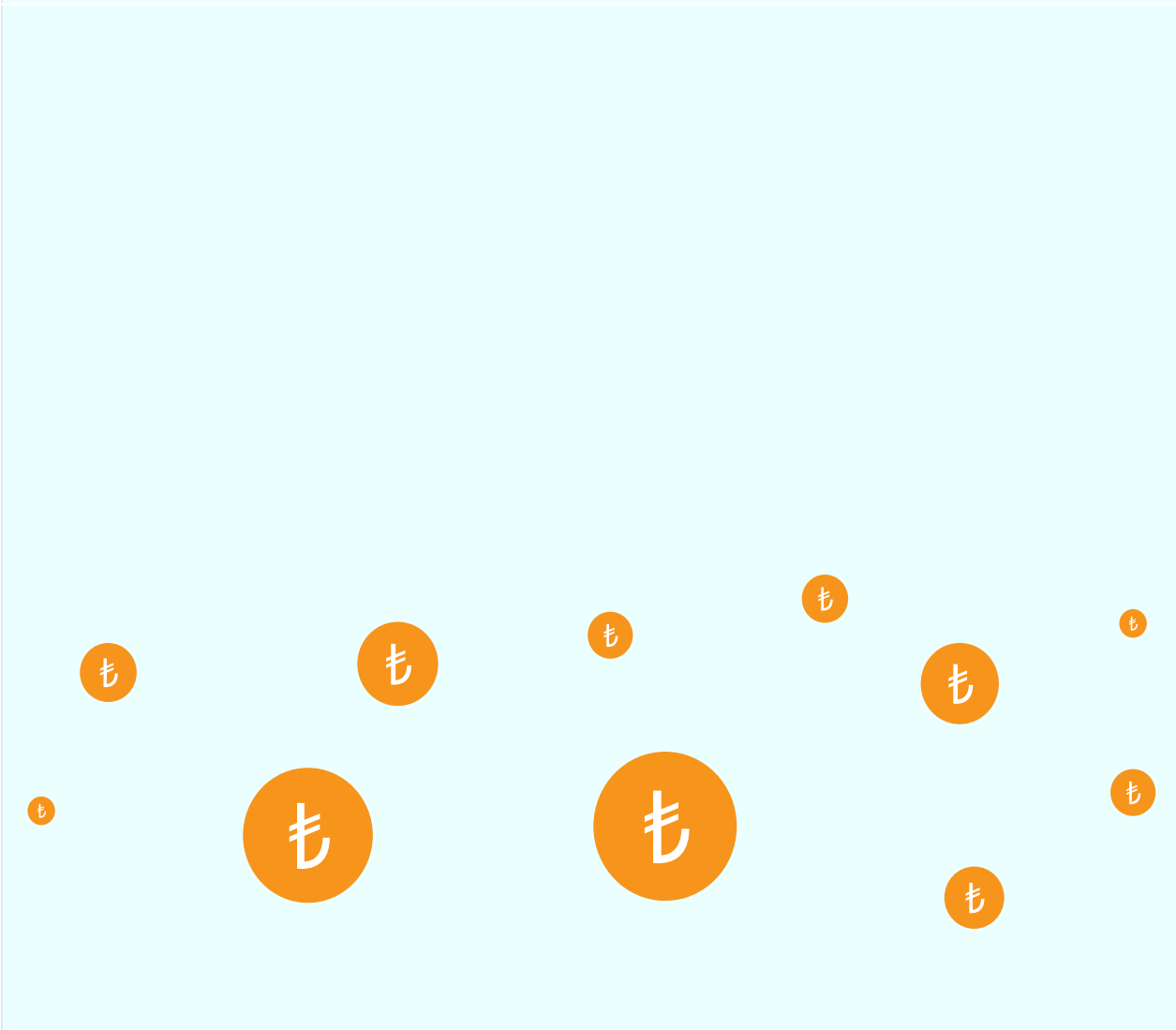
For long-distance call traffic, alternative fixed telephony operators had a market share of 84.6%, while Turk Telekom's share was 15.4%.

In call traffic directed to mobile networks, fixed telephony operators accounted for 71.4%, and Turk Telekom held 28.6%.

For outbound international call traffic, Turk Telekom's market share was 66.6%, whereas fixed voice operators' share was 33.4%.

In international call traffic terminated on fixed networks, Turk Telekom's share was 31.9%, with fixed telephony operators holding 68.1%.

In international call traffic terminated on mobile networks, fixed telephony operators' share was 83%, while Turk Telekom's share was 17%.



Broadband Market

- Broadband internet subscribers, which were around 6 million in 2008, reached 96 million as of the first quarter of 2025.
- In the first quarter of 2025, there was a slight decrease in total internet subscriptions compared to the previous three-month period, but increased by 3.3% annually.
- In the first quarter of 2025, the number of xDSL subscribers was approximately 9.99 million, while the number of fiber subscribers reached 8.32 million.
- The number of cable internet subscribers remained unchanged from the previous three-month period at 1.47 million.
- In the first quarter of 2025, the total revenue of internet service providers reached ₺21.2 billion.
- In the first quarter of 2025, the average monthly usage of fixed broadband internet subscribers was 288.3 GBytes, while the average monthly usage of mobile broadband internet subscribers was 16.7 GBytes.



Mobile Market



- As of the end of March 2025, there are a total of 95,027,885 mobile subscribers in Türkiye, including machine-to-machine (M2M) subscribers, corresponding to a penetration rate of approximately 110.9%. Excluding machine-to-machine (M2M) and the 0-9 age group, the mobile penetration rate was 113.5%.
- In the first quarter of 2025, the number of 3G subscribers decreased to 4,546,099, while the number of 4.5G subscribers was 88,184,767. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones with 3G and 4.5G services was 75,284,037. The total amount of mobile internet usage in the first quarter of 2025 was 3,690,971 TBytes.
- As of the first quarter of 2025, the number of M2M subscribers was approximately 10.8 million.
- As of the first quarter of 2025, the number of prepaid mobile broadband subscribers was 13,508,022 and the number of postpaid mobile broadband subscribers was 60,428,970.
- In the first three months of 2025, the number of mobile number portability decreased by 30.1% compared to the previous three-month period and was 3,030,737. A total of 193,031,155 number portability transactions were carried out until March 31, 2025.
- As of the first quarter of 2025, Turkcell has a share of 40.3%, Vodafone 30.4% and TT Mobil 29.3% in terms of subscriber numbers.
- Approximately 82% of total mobile subscribers are individual subscribers and 18% are corporate subscribers.
- Total mobile traffic volume in the first quarter of 2025 was 73.9 billion minutes. When traffic information for the first quarter of 2025 is compared to the previous three-month period, it is seen that total mobile traffic decreased by 5.1% and by 3.7% compared to the same period of the previous year.
- When examined on an operator basis, Turkcell's traffic decreased by 6.3%, Vodafone's traffic by 5.3% and TT Mobil's traffic by 3.4% compared to the previous period.
- In the first three months of 2025, it is seen that the total number of SMS was approximately 5,330 million and the number of MMS was approximately 8.5 million.
- When market shares by revenue are examined as of the first quarter of 2025, it is seen that Turkcell's market share is 39.9%, Vodafone's market share is 35.3% and TT Mobil's market share is 24.8%.

- When market shares by revenue are compared with the previous period in the first quarter of 2025, it is seen that TT Mobil's market share increased by 1.9 points, Vodafone's market share increased by 1.1 points and Turkcell's market share decreased by 3 points.
- According to the revenue obtained from subscribers as of the first quarter of 2025, Turkcell's market share is 43.1%, while Vodafone and TT Mobil's market shares are 30.6% and 26.4%, respectively.
- Call revenues constitute 6.1% of TT Mobil's revenues, 8.7% of Vodafone's revenues, and 7% of Turkcell's revenues. SMS and MMS revenues constitute 22.9% of TT Mobil's revenues, 5.5% of Vodafone's revenues, and 1.9% of Turkcell's revenues. Data revenues have a share of 68.4% in TT Mobil, 84.8% in Vodafone, and 89.9% in Turkcell.
- As of the first quarter of 2025, the monthly revenue per subscriber is ₺273.9 for Turkcell, ₺257.4 for Vodafone, and ₺230.2 for TT Mobil.
- As of March 2025, Turkcell's MoU value is 405 minutes, Vodafone's is 523 minutes, and TT Mobil's is 484 minutes.
- Türkiye has become the country that makes the most calls on mobile phones compared to the European countries in the first quarter of 2025, with an average monthly mobile usage time of 455 minutes.



Other Services

As of the first quarter of 2025, the total fiber length of operators is 618 thousand kilometers. Of this, 238 thousand kilometers are used for backbone purposes, while the remaining portion is used for access. The total revenue generated by alternative infrastructure operators in the first quarter of 2025 is approximately ₺2,974 million.

In Q1 2025, the total number of cable TV subscribers of Turksat reached 1,502,786. The number of IPTV service subscribers offered by TNet and Superonline are 1,098,969 and 1,456,302 respectively.

As of the end of the first quarter of 2025, operators authorized to provide Satellite Communication Services served 15,508 subscribers and the total revenue generated from this service during the same period was approximately ₺1,107 million.

The total number of users of Satellite Platform Services reached approximately 4 million as of the first quarter of 2025. The total revenue from this service was approximately ₺256,8 million.

As of the first quarter of 2025, the total number of subscribers to GMPCS Services was 6,027 and the revenue generated from GMPCS services was approximately ₺42 million.

Within the scope of directory services, the total number of calls in Q1 2025 was 242,588, with a cumulative call duration of 387,390 minutes. The quarterly revenue generated by directory service providers amounted to approximately ₺25.7 million.

During this period, the total number of subscribers of operators offering Public Access Mobile Radio (PAMR) Services was 2,558 and the number of users was 125,636. The revenue from these services in the first quarter of 2025 was ₺90.3 million.



ABBREVIATIONS

The operators mentioned in this report and their corresponding abbreviations are listed below:

ALFA İLETİŞİM HİZMETLERİ PAZARLAMA TİCARET AŞ	Alfa İletişim
ANDROMEDA TV DİJİTAL PLATFORM İŞLETMECİLİĞİ A.Ş.	Andromeda TV
ASELNET HABERLEŞME SİSTEMLERİ İŞLETMECİLİĞİ VE TİC. LTD. ŞTİ.	Aselnet
AT&T GLOBAL İLETİŞİM SERVİSLERİ LTD. ŞTİ.	AT&T Global
BN TELEKOM HABERLEŞME TİCARET AŞ	BN Telekom
BT BİLİŞİM HİZM. AŞ	BT Bilişim
BT TELEKOM HİZM. AŞ	BT Telekom
CALLTÜRK TELEKOMÜNİKASYON HİZMETLERİ AŞ	Callturk
CLİCKNET TELEKOMÜNİKASYON UYDU TEKNOLOJİLERİ AŞ	Clicknet
COMPATEL TELEKOMÜNİKASYON HİZMETLERİ LİMİTED ŞİRKETİ	Compatel
DEUTSCHE TELEKOM GLOBAL BUSINESS SOLUTIONS TELEKOMÜNİKASYON LTD ŞTİ	Deutsche Telekom
DİGİTAL PLATFORM TEKNOLOJİ HİZMETLERİ AŞ	Digital Platform
ESER TELEKOMÜNİKASYON SAN. VE TİC. AŞ	Eser Telekom
EVYAPAN BİLGİ TEKNOLOJİLERİ TİCARET LİMİTED ŞİRKETİ	Evyapan
GRİD TELEKOMÜNİKASYON HİZMETLERİ AŞ	Grid
ICOM UYDU HABERLEŞME AŞ	Icom
ICT TELEKOMÜNİKASYON SANAYİ TİCARET AŞ	ICT Telekom
İŞ NET ELEKTRONİK BİLGİ ÜRETİM DAĞITIM TİC. VE İLETİŞİM HİZM. AŞ	İş Net
HATNET BİLGİ İLETİŞİM TEKNOLOJİLERİ VE TİCARET LTD ŞTİ	Hatnet
KULE HİZMET VE İŞLETMECİLİK AŞ	Kule
MİLLENİCOM TELEKOMÜNİKASYON HİZM. AŞ	Millenicom
MOBİLKOM ELEKTRONİK SANAYİ VE TİC. LTD. ŞTİ.	Mobilkom
MOBİLİŞİM İLETİŞİM ANONİM ŞİRKETİ	Mobilışim
NETGSM İLETİŞİM VE BİLGİ TEKNOLOJİLERİ AŞ	Netgsm
ORANGE BUSINESS TURKEY BİLİŞİM ANONİM ŞİRKETİ	Orange
PLUSS TELEKOM İLETİŞİM TİCARET AŞ	Pluss Telekom
REHBERLİK HİZMETLERİ SERVİSİ AŞ	Rehberlik Hizmetleri
SOCAR TURKEY FİBER OPTİK AŞ	Socar
SUPERONLINE İLETİŞİM HİZMETLERİ AŞ	Superonline
TEKNOMOBİL UYDU HABERLEŞME AŞ	Teknomobil
TEKNOTEL TELEKOMÜNİKASYON SAN. Ve Tic. AŞ	Teknotel
TELSAM TELEKOMÜNİKASYON YAZ. SAN. Ve TİC. LTD. ŞTİ.	Telsam Telekom
TT MOBİL İLETİŞİM HİZMETLERİ AŞ	TT Mobil
TT INTERNATIONAL TELEKOMÜNİKASYON SAN. ve TİC. LTD. ŞTİ.	TT Int (MTCTR Memorex)
TTM TEL. VE İLETİŞİM HİZM. AŞ	TTM Telekom
TTNET A.Ş.	TTNet
TURKCELL İLETİŞİM HİZMETLERİ AŞ	Turkcell
TURKNET İLETİŞİM HİZMETLERİ AŞ	Turknet
TÜRK TELEKOMÜNİKASYON AŞ	Türk Telekom
TÜRKSAT UYDU HABERLEŞME KABLO TV VE İŞLETME AŞ	Türksat
VODAFONE NET İLETİŞİM HİZMETLERİ AŞ	Vodafone Net
VODAFONE TELEKOMÜNİKASYON AŞ	Vodafone
VOİCE TELEKOMÜNİKASYON HİZMETLERİ	Voice Telekom
VOİP TELEKOMÜNİKASYON HİZM. LTD. ŞTİ.	Voip



PART 1

**GENERAL
MARKET DATA**

1. GENERAL MARKET DATA

This report has been prepared based on the data submitted to our Authority by the operators in the Turkish electronic communications sector, and within the scope of the report, the data for the first quarter (January-February-March) of 2025 are analyzed in comparison with the previous periods.

1.1 NUMBER OF OPERATORS ACCORDING TO AUTHORIZATION AND SERVICE TYPES

As of March 31, 2025, the number of operators operating in the electronic communications sector is 410 and the number of authorizations granted to these operators is 760. Table 1-1 shows the number of authorizations according to service types.

Table 1-1 Number of Authorizations by Service Types

Services	Number of Authorizations	Yetkilendirme Sayısı
Service Agreement	Satellite and Cable TV Services	1
Concession Agreement	GSM Service	3
	IMT-2000/UMTS Service	3
	Various Telecommunications Services	1
Service Providers under Notification	Satellite Telecommunications Service	24
	Satellite Platform Service	7
	Infrastructure Operation Service	190
	Internet Service Providers	307
	Cable TV Service	13
	GMPCS	6
	GSM 1800 Mobile Phone Service on Aviation	2
	Mobile Virtual Network Operator Service	19
	IMT Service	3
	GMPCS Mobile Telephony Service	2
Service Providers under Right of Use	PMR/PAMR Service	37
	Infrastructure Operating Service	14
	Fixed Telephone Service	102
	Directory Assistance Services	7
	Mobile Virtual Network Operator Service	19
TOTAL		760

1.2 OPERATORS' REVENUES

The annual net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone since 2019 are given in Tables 1-2. In 2024, total net sales revenues exceeded ₺317.6 billion, with an increase of 85.8% compared to the previous year.

Table 1-2 Annual Net Sales Revenues of Türk Telekom and Mobile Operators, ₺

Net Sales (₺)	2019	2020	2021	2022	2023	2024
TT Mobil	8,938,985,623	9,873,044,574	11,465,795,689	16,360,278,627	30,290,242,704	58.830.648.231
Turkcell	16,153,497,422	17,970,014,752	20,852,544,558	30,071,240,620	55,116,671,491	108,114,849,038
Türk Telekom	11,726,372,626	14,576,197,872	17,066,805,703	22,061,735,471	35,894,868,968	61,426,295,751
Vodafone	13,813,476,176	15,133,092,255	17,835,967,775	26,727,065,567	49,689,927,732	89,277,262,807
TOTAL	50,632,331,846	57,552,349,454	67,221,113,725	95,220,320,285	170,991,710,895	317,649,055,827

Table 1-3 shows the quarterly net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone, which are obtained from information reported by the operators to BTK. In Q1 2025, the net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were ₺97.9 billion in total.

Table 1-3 Quarterly Net Sales Revenues of Türk Telekom and Mobile Operators, ₺

	2024-1	2024-2	2024-3	2024-4	2025-1
TT Mobil	11,066,504,908	14,062,419,699	16,035,104,160	17,666,619,463	19,617,594,952
Turkcell	19,184,532,931	25,014,462,331	30,784,643,689	33,131,210,086	31,615,962,867
Türk Telekom	10,403,098,659	12,132,965,843	18,266,007,494	20,624,223,755	18,786,324,477
Vodafone	17,440,406,240	20,800,157,869	24,619,662,226	26,417,036,471	27,929,285,806
TOTAL	58,094,542,739	72,010,005,743	89,705,417,570	97,839,089,775	97,949,168,103

Table 1-4 presents quarterly revenue information of operators other than TT Mobil, Turkcell, Türk Telekom and Vodafone. The revenue information of operators that could not provide revenue breakdown among authorization types is included in the main activity area. In this context, the total revenue of other operators operating in the sector within the scope of the authorization types specified below was ₺29.3 billion in Q1 2025.

Table 1-4 Quarterly Revenues of Other Operators, ₺ *

Authorization Type	2024-1	2024-2	2024-3	2024-4	2025-1
ISP	12,631,213,749	14,304,907,904	17,089,823,374	19,327,143,211	21,151,569,648
FTS	1,484,353,058	1,787,246,559	2,284,538,671	2,485,594,391	2,756,082,957
Infrastructure	2,226,155,196	2,264,671,387	2,790,207,935	2,814,712,300	2,974,185,772
Satellite Communications	773,094,196	903,962,050	945,466,194	1,152,281,266	1,107,037,507
Directory Assistance	15,906,109	19,446,742	25,347,493	27,904,488	25,725,577
Cable TV	1,143,939,361	864,421,272	950,613,387	1,072,651,442	1,162,766,466
GMPCS	32,864,489	33,937,981	32,994,293	49,949,835	41,870,932
PMR/PAMR	56,641,148	59,449,245	66,208,761	92,748,150	90,313,447
TOTAL	18,364,167,306	20,238,043,142	24,185,200,108	27,022,985,083	29,309,552,306

* It has been prepared by taking into account the 3-month income information sent by the operators to our Authority..

Table 1-5 shows the revenue information submitted to the Authority by the operators, other than TT Mobil, Turkcell, Türk Telekom and Vodafone, within the scope of the authorizations they have between 2019 and 2024.

Table 1-5 Annual Revenues of Other Operators, ₺ *

Authorization Type	2019	2020	2021	2022	2023	2024
ISP	9,454,106,646	12,111,887,498	15,208,840,554	21,463,001,302	34,563,506,139	63,353,088,238
FTS	2,058,587,828	2,174,904,731	2,590,269,260	3,920,527,816	5,633,522,862	8,041,732,679
Infrastructure	2,767,979,001	3,199,448,389	4,417,611,951	5,710,342,129	7,037,826,920	10,095,746,818
Satellite Communications	617,601,149	658,831,280	734,722,869	1,409,921,878	2,752,102,254	3,774,803,706
Directory Assistance	33,272,378	35,265,916	32,628,686	35,990,891	63,285,885	88,604,832
Cable TV	988,865,014	1,251,496,703	2,125,536,697	2,374,097,589	3,233,851,339	4,031,625,463
GMPCS	18,411,743	24,308,019	29,521,547	58,730,148	102,226,961	149,746,598
PMR/PAMR	111,470,036	79,517,111	95,008,078	116,658,002	179,174,510	275,047,304
TOTAL	16,050,293,794	19,535,659,649	25,234,139,641	35,089,269,755	53,565,496,871	89,810,395,639

* It has been prepared by taking into account of quarterly revenue information sent by the operators to our Authority.

1.3 OPERATORS' INVESTMENTS

Tables 1-6 and 1-7 provide the quarterly investment information of TT Mobil, Turkcell, Türk Telekom and Vodafone, respectively, and their total annual investment amounts between 2019 and 2024. In Q1 2025, total investment of TT Mobil, Turkcell, Türk Telekom and Vodafone was around ₺15.7 billion.

Table 1-6 Quarterly Investments of Türk Telekom and Mobile Network Operators, ₺

	2024-1	2024-2	2024-3	2024-4	2025-1
TT Mobil	1,369,543,029	2,560,079,456	2,812,307,856	5,733,655,419	2,473,416,889
Turkcell	4,858,470,767	4,979,403,086	4,799,786,002	11,188,434,972	5,927,917,794
Türk Telekom	1,630,832,785	2,817,149,933	4,613,296,297	9,259,225,120	3,435,090,401
Vodafone	2,799,520,122	2,366,888,046	3,540,553,080	3,757,313,645	3,898,411,338
TOTAL	10,658,366,702	12,723.520.521	15,765,943,235	29,938,629,157	15,734,836,422

Table 1-7 Total Annual Investment of Türk Telekom and Mobile Operators, ₺ *

	2019	2020	2021	2022	2023	2024
TT Mobil	1,668,144,899	2,265,801,468	2,474,002,218	3,931,720,163	7,164,169,837	12,475,585,760
Turkcell	4,924,633,216	6,162,326,026	5,791,624,753	7,895,189,534	17,204,981,041	25,826,094,827
Türk Telekom	2,354,748,379	3,286,575,362	4,808,048,542	7,628,594,767	10,705,189,640	18,320,504,135
Vodafone	1,285,298,488	1,313,856,069	1,910,714,976	2,797,515,312	6,116,895,859	12,464,274,892
TOTAL	10,232,824,981	13,028,558,925	14,984,390,489	22,253,019,776	41,191,236,377	69,086,459,615

Table 1-8 provides quarterly investments of other operators in the market. Accordingly, ₺3 billion was invested by other operators in Q1 2025.

Table 1-8 Quarterly Investment of Other Operators, ₺ *

	2024-1	2024-2	2024-3	2024-4	2025-1
Other Operators	1,980,382,714	2,704,085,770	6,168,384,296	14,142,106,278	3,042,033,573

* It has been prepared by taking into account the 3-month income information sent by the operators to our Authority.

The total annual investments of other operators between 2019 and 2024 are given in Table 1-9.

Table 1-9 Total Annual Investment of Other Operators, ₺*

	2019	2020	2021	2022	2023	2024
Other Operators	2,622,761,501	3,654,475,964	6,805,857,759	8,836,728,456	11,218,705,551	24,994,959,059

* It has been prepared by taking into account the 3-month income information sent by the operators to our Authority.

1.4 TOTAL TRAFFIC

Figure 1-1 and Figure 1-2 show the total amount and distribution of traffic generated by fixed and mobile operators in the Turkish electronic communications sector. When the distribution of total traffic is examined, it is seen that the amount of mobile traffic has increased while the amount of fixed traffic has decreased over the years. In 2024, the total amount of traffic increased by 0.5% compared to the previous year and reached 323.1 billion minutes. Mobile traffic accounted for approximately 98.4% of this traffic.

Figure 1-1 Total Annual Telephony Traffic Volumes, Billion Minutes

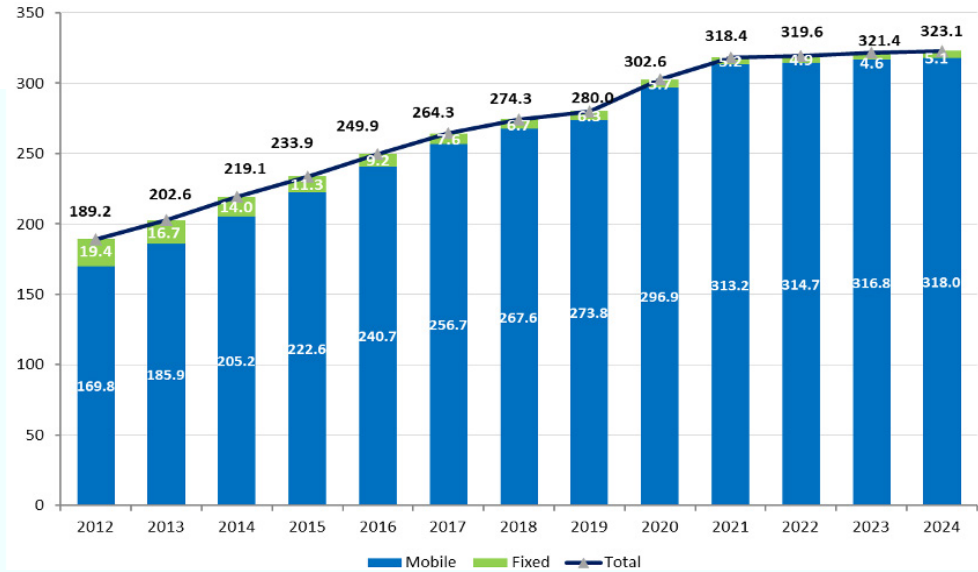
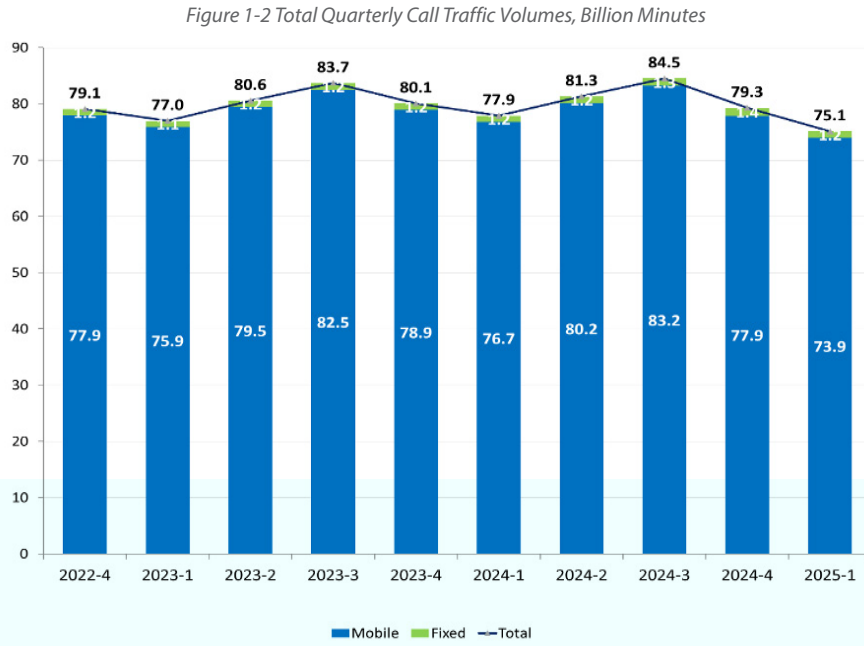
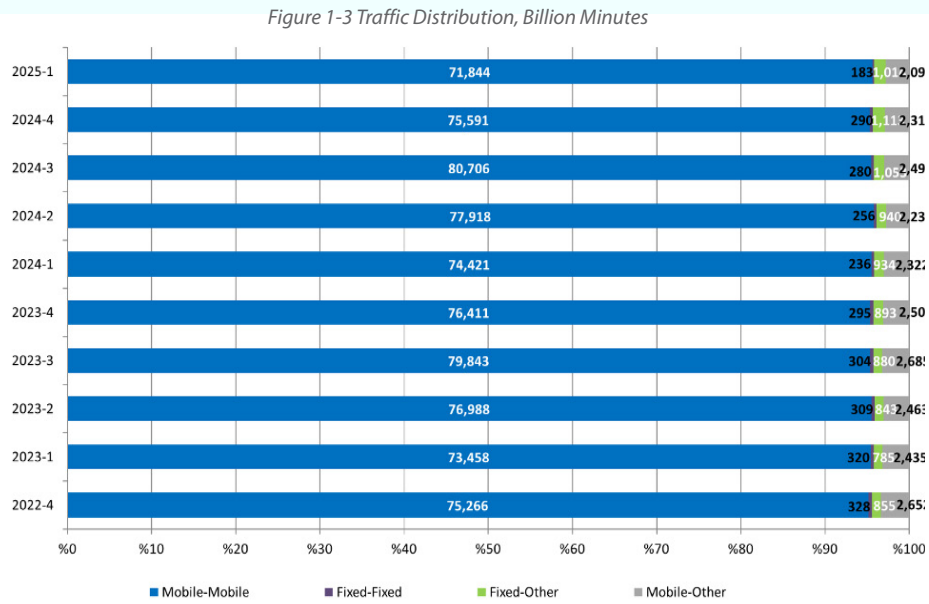


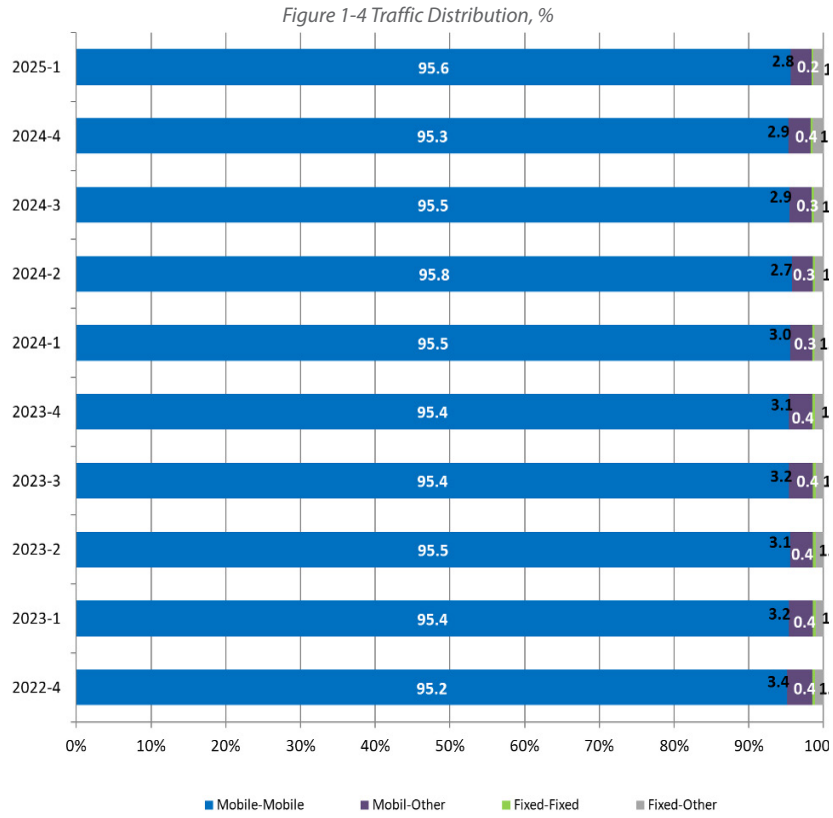
Figure 1-2 shows the total fixed and mobile traffic in Türkiye on a quarterly basis starting from the Q4 2022. In Q1 2025, the total mobile traffic was approximately 73.9 billion minutes, while the fixed traffic was 1.2 billion minutes.



The distribution of traffic generated by fixed and mobile operators in the Turkish electronic communications sector by direction is compared in quarterly as follows.



In the first quarter of the year, the majority of the total traffic (95.6%) was mobile-to-mobile traffic, which consisted of calls made within the mobile operators' own networks as well as to other mobile networks (Figure 1-4).



1.5 CONSUMER COMPLAINTS

Table 1-10 show the number of complaints submitted to the BTK via Online Consumer Complaint System on a quarterly basis by services. In Q1 of 2025, 45,211 complaints were submitted to the BTK.

Table 1-10 Quarterly Number of Consumer Complaints by Sector

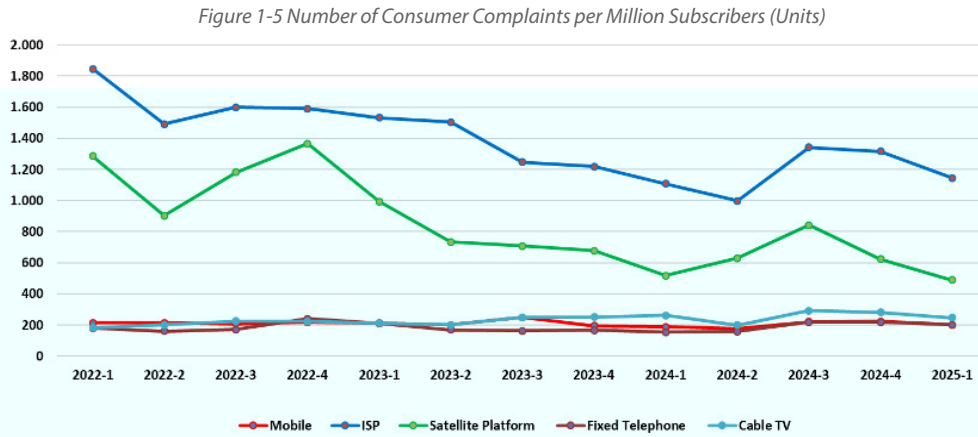
	2023-3	2024-4	2024-1	2024-2	2024-3	2024-4	2025-1
Mobile	23,210	17,994	17,348	16,648	20,960	21,064	19,087
ISP	22,674	22,297	20,444	18,481	25,116	25,065	22,007
Satellite Platform	2,954	2,808	2,118	2,536	3,454	2,521	1,947
Fixed Telephone	1,684	1,659	1,441	1,489	2,010	1,982	1,798
Cable TV	360	371	385	291	433	422	372
TOTAL	50,882	45,129	41,826	39,445	51,973	51,054	45,211

The percentage distribution of the most common complaint topics among the complaints received by services is given in the table below.

Table 1-11 Distribution of Consumer Complaints by Subject

	The Share of the Most Complained Issue in the Relevant Sector within the Total Number of Complaints
Mobile Services	Billing →%25.35
Internet Service Provider Service	Subscription Transactions →%36.09
Satellite Platform Service	Billing →%23.06
Fixed Telephone Service	Subscription Transactions →%34.65
Cable TV Service	Connection/Service Quality →%36.83

Figure 1-5 shows the number of consumer complaints per million subscribers on a service basis. As of the Q1 2025, an average number of consumer complaints per million subscribers was 1,144 for ISPs, 488 for satellite platform service providers, 248 for Cable TV service providers, 202 for fixed telephony service providers and 201 for mobile operators.





PART 2
FIXED
TELEPHONY
MARKET DATA

2. FIXED TELEPHONY MARKET DATA

In Q1 2025, Türkiye had 8,901,562 fixed telephony subscribers with a penetration rate of approximately 10.4% (Figure 2-1). Considering that the average household size in Türkiye is 3.11, it can be said that fixed telephony services reach a significant portion of the population.

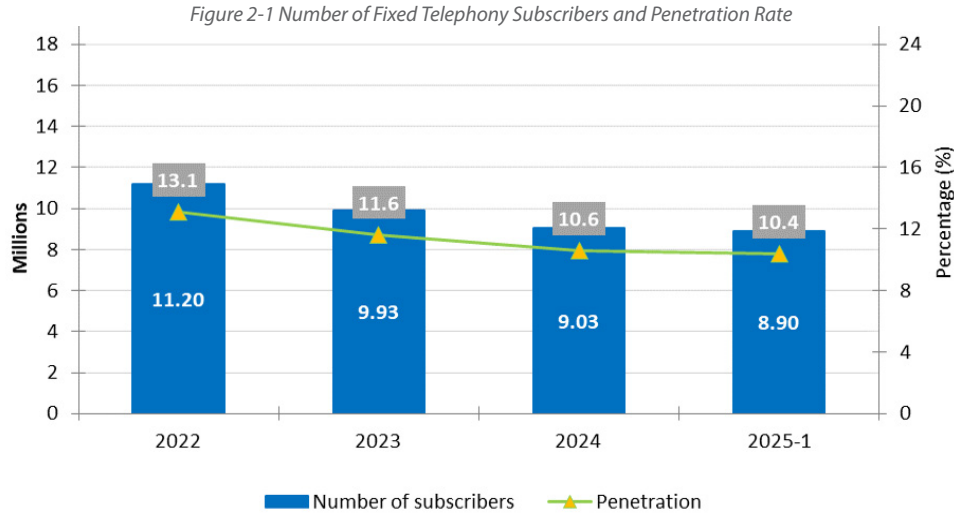


Table 2-1 presents the market shares of alternative fixed telephony operators in terms of subscriber numbers. According to the data, the top three operators are TTNNet, Türksat, and NetGSM.

Table 2-1 Market Shares of Alternative Fixed Telephony Operators by Number of Subscriber

Operator	Market Share (%)
TTNet	73.8
Türksat	3.1
NetGsm	2.8
Is Net	2.8
Voip Telekom	2.6
Türk Net	2.5
Superonline	1.7
Vodafone Net	1.5
Others	9.1

In Q1 2025, the market shares of operators based on their net sales are presented in Table 2-2. In this context, the top three alternative fixed telephony operators with the highest share of net sales in Q1 2025 were Superonline, Vodafone Net, and TTNNet, respectively.

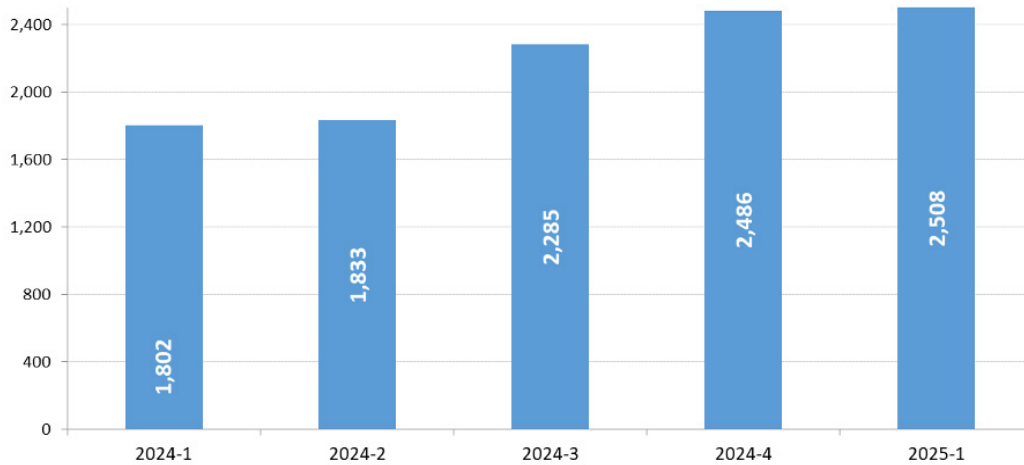
Table 2-2 Market Shares of Alternative Fixed Telephony Operators by Net Sales Revenue

Operator	Market Share (%)
Superonline	50.4
Vodafone Net	24.1
TTNet	10.8
Eser Telekom	1.9
NetGsm İletişim	1.9
Posta Guvercini	1.5
Compatel Telekom	1.2
Verimor	0.8
Others	7.3

2.1 CALL REVENUES FROM FIXED VOICES

In Q1 2025, Turk Telekom’s fixed telephony revenues reached approximately ₺2,508 billion, representing an increase of 39.2% compared to the same period of the previous year, and a 0.9% increase compared to the previous quarter (Figure 2-2).

Figure 2-2 Turk Telekom Call Revenues, Million ₺



Calculated based on gross sales.

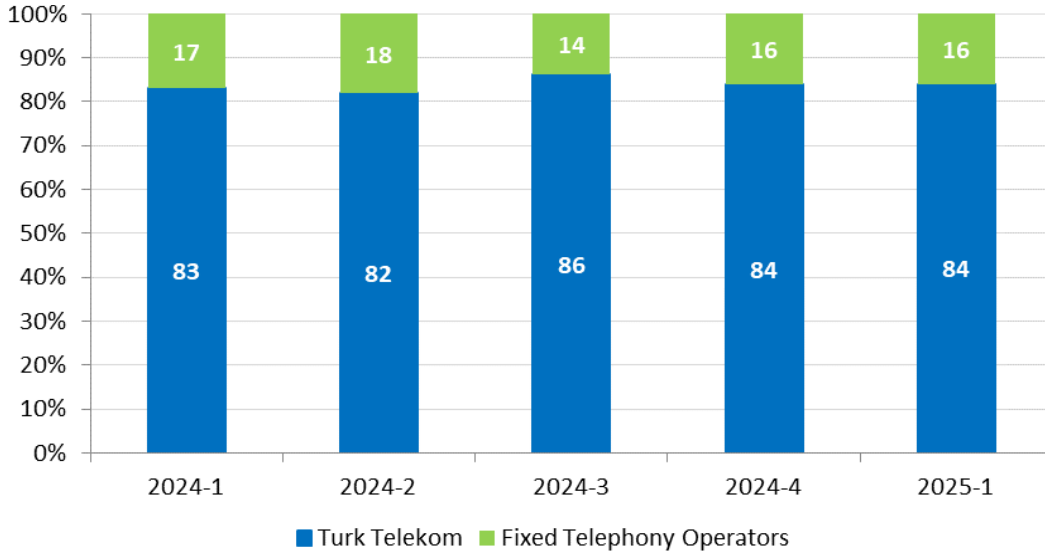
Table 2-3 presents the total net sales revenues of alternative fixed telephony operators starting from Q1 2024. Approximately 5.7 million subscribers received fixed telephony services from alternative operators. For Q1 2025, the total revenue generated by these operators from all fixed telephony services amounted to approximately ₺2,756 billion.

Table 2-3 Net Sales Revenues of Alternative Fixed Telephone Operators (₺)

Quarter	Net Sales Revenue (₺)
2024-1	1,484,353,058
2024-2	1,787,246,559
2024-3	2,284,538,671
2024-4	2,485,594,391
2025-1	2,756,082,957

Figure 2-3 illustrates the market shares of alternative fixed telephony operators and Turk Telekom based on their revenues from telephone services. In Q1 2025 the market shares of alternative fixed telephony operators and Turk Telekom were 16% and 84%, respectively.

Figure 2-3 Market Shares of Turk Telekom and Alternative Fixed Telephone Operators by Telephone Service Revenues (%)



* It includes Turk Telekom's revenues from local, long-distance, international, and mobile calls, as well as fixed fees and connection/transfer charges.

2.2 TRAFFIC VOLUME IN FIXED TELEPHONY MARKET

Figure 2-4 compares the shares of alternative fixed telephony operators and Turk Telekom in local call traffic. While fixed telephony operators accounted for 31.4% of this traffic in the previous quarter, their share declined to 29.3% in Q1 2025.

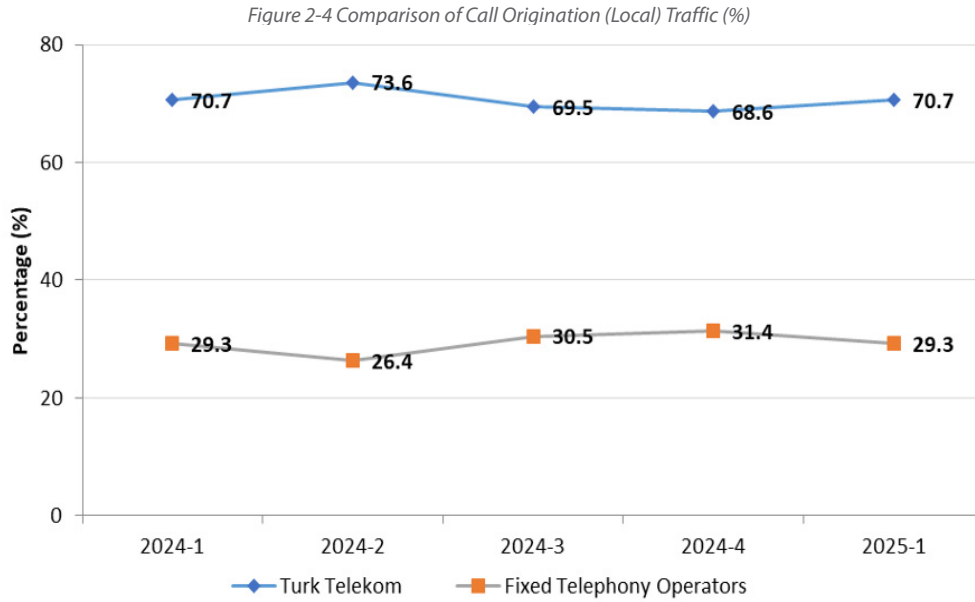


Figure 2-5 compares the shares of alternative fixed telephony operators and Turk Telekom in long-distance traffic starting from the Q1 2024. Accordingly, in Q1 2025, operators held a market share of 84.6% in long-distance traffic, while Turk Telekom's share was 15.4%.

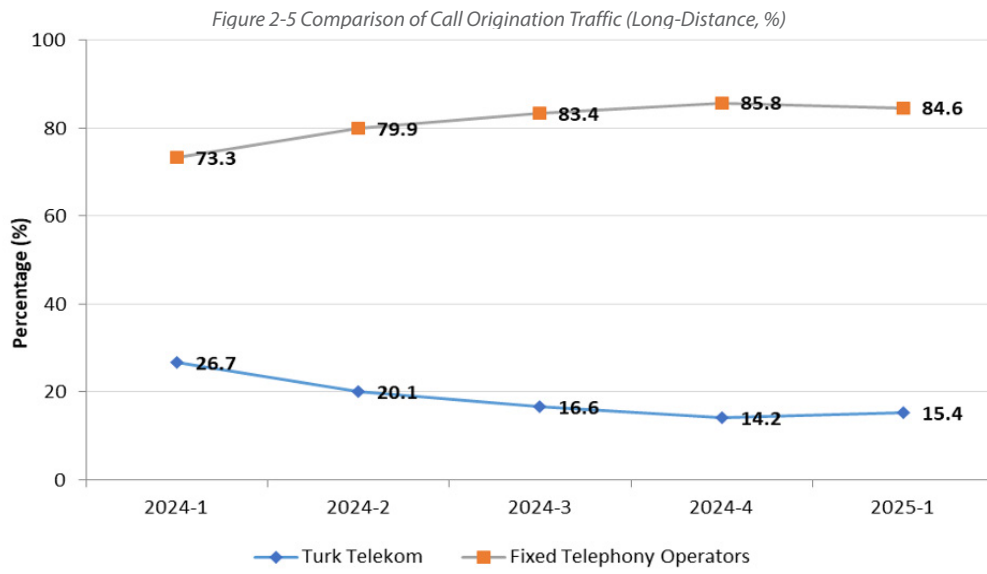
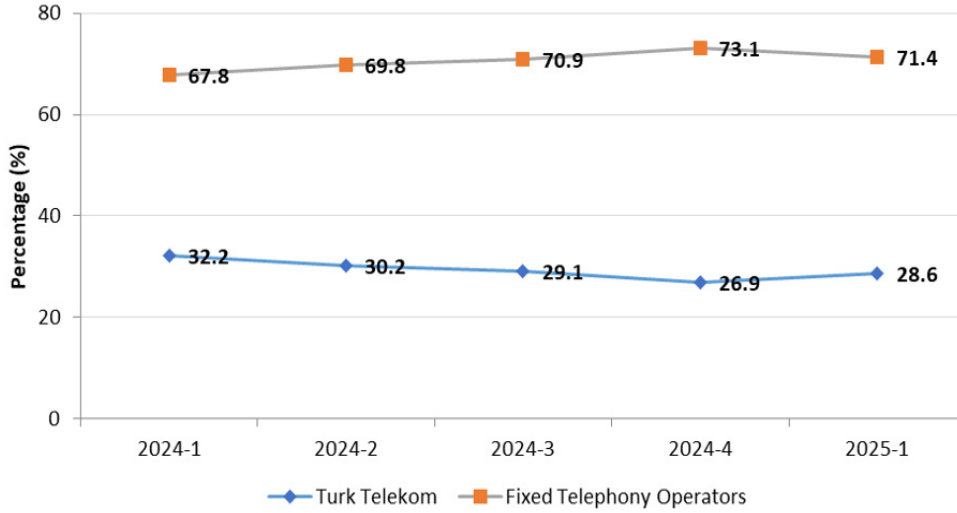


Figure 2-6 compares the market shares of alternative fixed telephony operators and Turk Telekom in call traffic directed to mobile networks. While fixed telephony operators held a market share of 67.8% in Q1 2024, their share increased to 71.4% in Q1 2025. Turk Telekom’s market share for the same period was 28.6%.

Figure 2-6 Comparison of Call Origination Traffic (Mobile, %)



When comparing the market shares of alternative fixed telephony operators and Turk Telekom in outbound international call traffic, Turk Telekom’s share declined from 52.2% in Q1 2024 to 33.4% by the end of the first quarter of 2025. During the same period, the market share of fixed telephony operators increased from 47.8% to 66.6% (Figure 2-7).

Figure 2-7 Comparison of Call Origination Traffic (International Outbound, %)

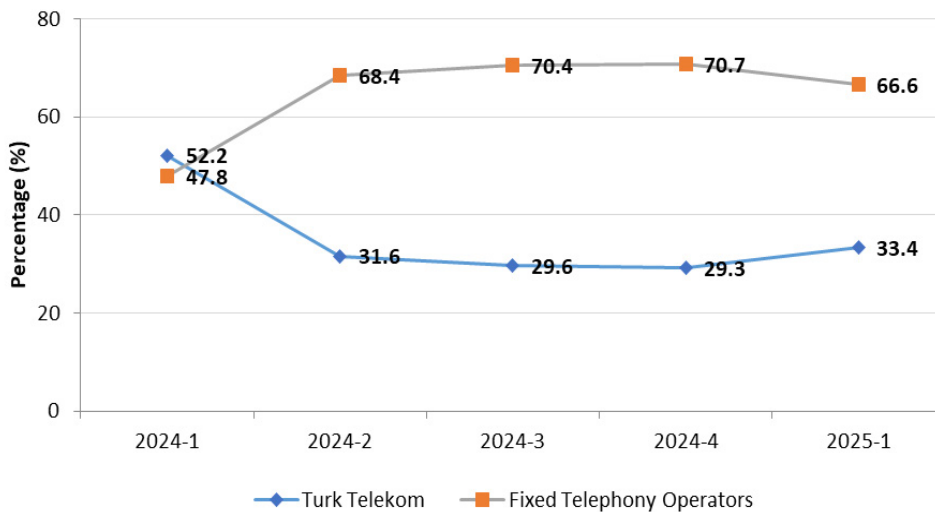


Figure 2-8 shows the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on the fixed network. Compared to the same period in 2024, Turk Telekom’s share increased from 15.5% to 31.9% in Q1 2025, while the share of fixed telephony operators declined from 84.5% to 68.1%.

Figure 2-8 Comparison of International Call Traffic Terminated on Fixed Networks – %

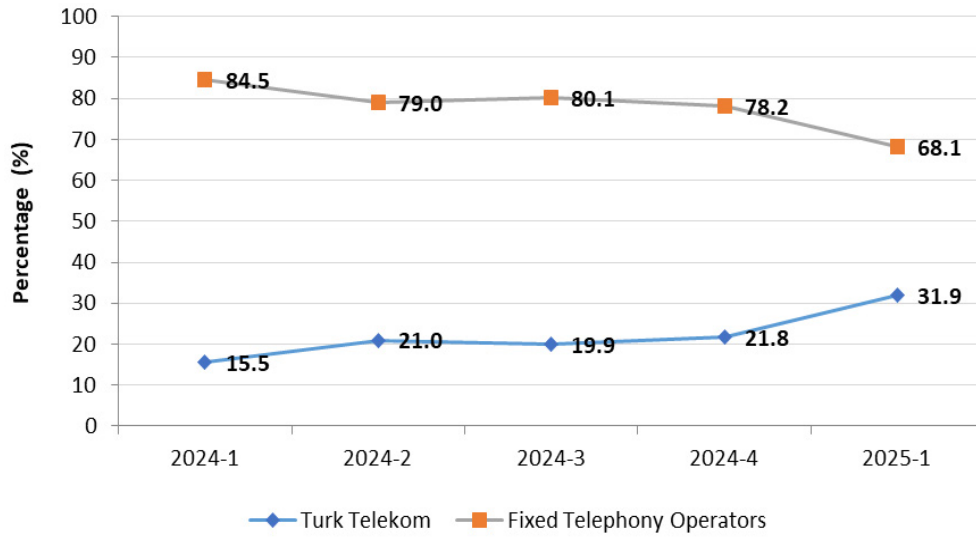


Figure 2-9 compares the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on mobile networks. In Q1 2024, alternative fixed telephony operators held a market share of 91.2% in this segment, which declined to 83% in Q1 2025. Meanwhile, Turk Telekom’s market share increased from 8.8% to 17% during the same period.

Figure 2-9 Comparison of International Call Traffic Terminated on Mobile Networks – %

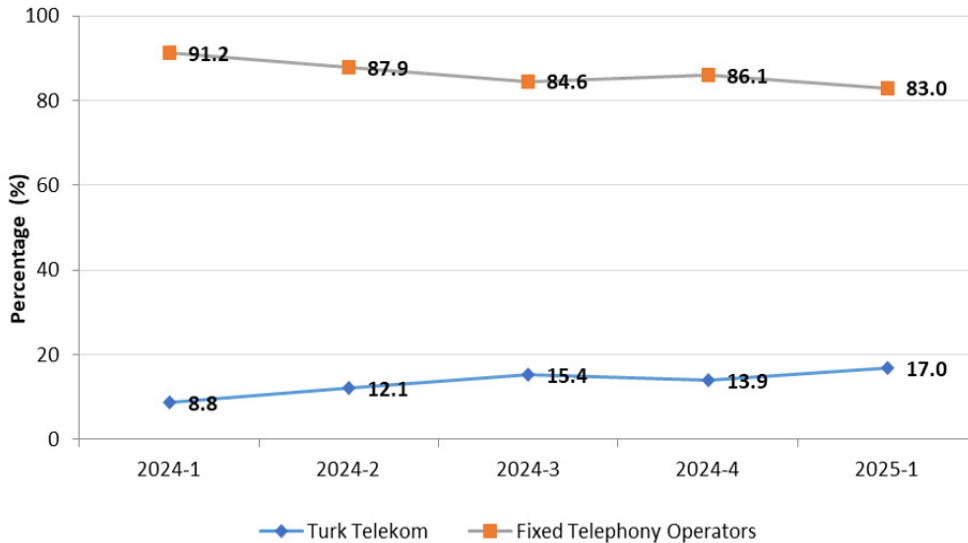
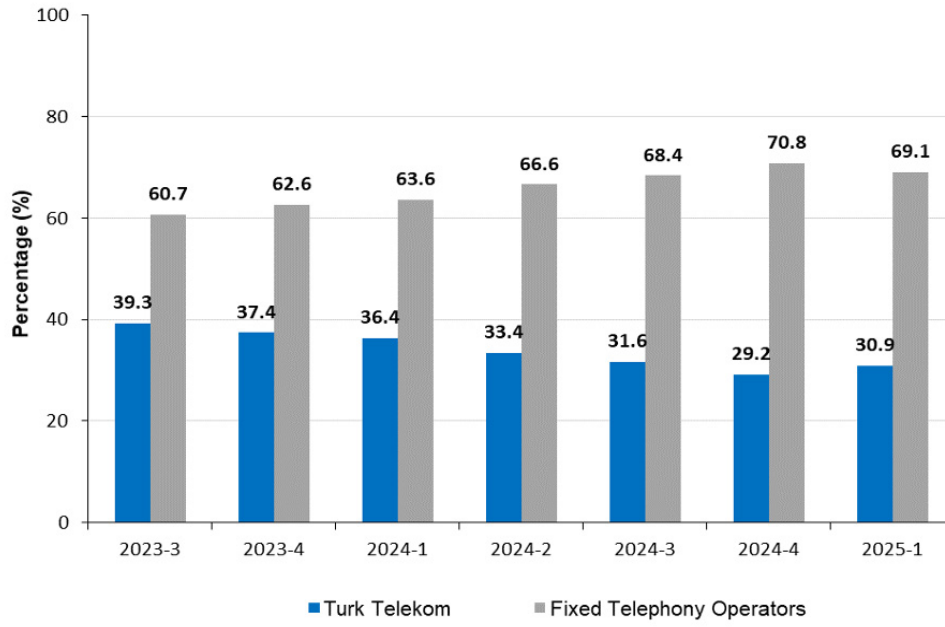


Figure 2-10 illustrates the shares of alternative fixed telephony operators and Turk Telekom in the total traffic originated on the fixed network. While alternative fixed telephony operators accounted for 63.6% share in this traffic in Q1 2024, their share increased to 69.1% in Q1 2025. During the same period, Turk Telekom’s share declined from 36.4% to 30.9%.



Figure 2-10 Market Shares of Fixed Telephony Operators and Turk Telekom in Total Fixed-Originated Traffic (%)





PART 3

**BROADBAND
MARKET DATA**

3. BROADBAND MARKET DATA

3.1 NUMBER OF SUBSCRIBERS

It is observed that the number of broadband internet subscribers reached 96 million in the first quarter of 2025, representing a 0.4% decrease compared to the previous quarter. In the fixed broadband segment, the number of fiber subscribers increased by 3.1%. Figure 3-1 presents the total number of broadband internet subscribers in Türkiye since 2008, broken down into fixed and mobile categories.

Figure 3 1 Number of Broadband Internet Subscribers

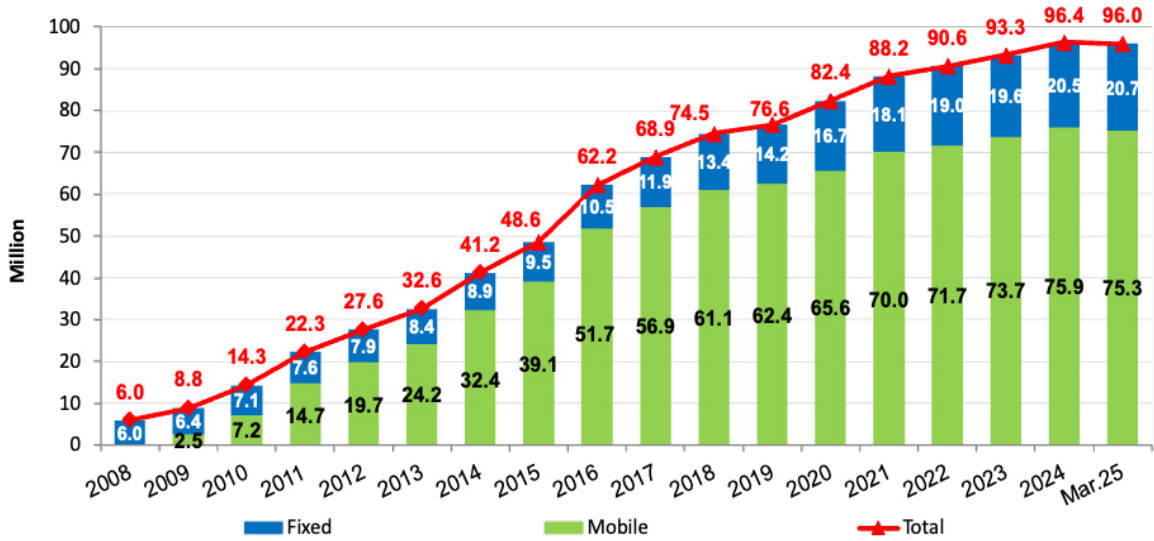


Table 3-1 presents the number of internet subscribers in Türkiye by type of connection, along with quarterly and annual growth rates. As of the first quarter of 2025, there was a slight decline in total internet subscriptions compared to the previous three-month period. However, in fixed internet subscriptions, the upward trend continued, particularly due to the increase in fiber subscribers. The annual growth rate in the number of internet subscribers was recorded at 1.9%.

Table 3-1 Total Number of Internet Subscribers

	2024-1	2024-4	2025-1	Çeyrek Dönem Büyüme Oranı (2024-4..2025-1)	Yıllık Büyüme Oranı (2024-1...2025-1)
xDSL	10,725,834	10,124,256	9,988,534	-1.3%	-6.9%
Mobil Bilgisayardan İnternet	666,345	706,492	757,744	7.3%	13.7%
Mobil Cepten İnternet	73,727,551	75,180,553	74,526,293	-0.9%	1.1%
Kablo İnternet	1,455,057	1,471,221	1,464,834	-0.4%	0.7%
Eve Kadar Fiber (FTTH)	5,755,937	6,845,641	7,083,425	3.5%	23.1%
Binaya Kadar Fiber (FTTB)	1,230,086	1,226,988	1,237,429	0.9%	0.6%
Fiber (Toplam)	6,986,023	8,072,629	8,320,854	3.1%	19.1%
Kablosuz-Telsiz İnternet (Sabit)	485,819	637,560	703,307	10.3%	44.8%
Diğer	161,840	190,964	204,637	7.2%	26.4%
TOPLAM	94,208,469	96,383,675	95,966,203	-0.4%	1.9%

Among total mobile broadband subscribers, 883,000 are Fixed Wireless (mobile). In the "Other" category, there are 58,000 Metro Ethernet subscribers.

Table 3-2 presents the revenue data for fixed broadband services over the past six years. In

2024, the revenues of the relevant operators reached ₺63.4 billion, marking an 83% increase compared to the previous year.

Table 3-2 Annual Fixed Broadband Service Revenues, ₺

Revenues	2019	2020	2021	2022	2023	2024
	9,691,336,036	12,334,386,474	15,406,066,019	21,463,001,301	34,563,506,139	63,353,088,238

Table 3-3 presents the quarterly revenue data for fixed broadband services. In the first quarter of 2025, the total revenue from fixed internet service provision amounted to ₺21.2 billion. Accordingly, there was an approximate 67% increase in the revenues of fixed broadband service providers compared to the same quarter of 2024.

Table 3-3 Periodic Fixed Broadband Service Revenues, ₺

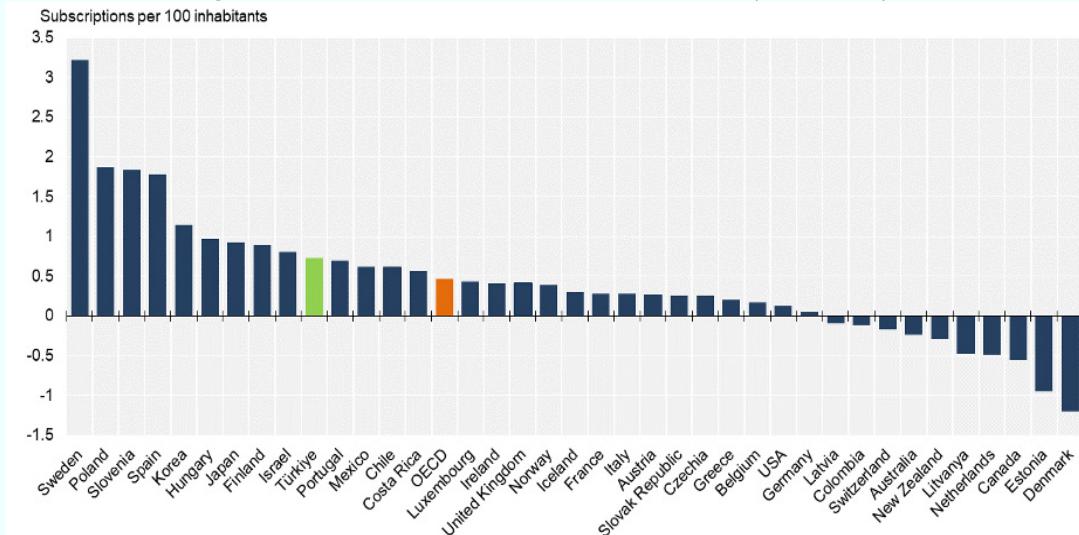
Revenues	2024-1	2024-2	2024-3	2024-4	2025-1
	12,631,213,749	14,304,907,904	17,089,823,374	19,327,143,211	21,151,569,648

3.2 PENETRATION RATES IN OECD COUNTRIES ²

Figure 3-2 illustrates the growth in fixed broadband penetration in Türkiye and OECD countries. Türkiye is among the countries with the highest increase in fixed internet penetration within the OECD over the past year. During this period, the average annual increase in penetration across OECD countries was 0.46%, whereas in Türkiye it was 0.73%.

Furthermore, when examining fixed and mobile broadband penetration rates by population, Türkiye’s fixed broadband penetration rate stood at 24.1%, compared to the OECD average of 36.3%. For mobile broadband, the penetration rate in Türkiye was 87.9%, while the OECD average was 137.8%.

Figure 3-2 Annual Growth Rates of Fixed Broadband Penetration by OECD Country, %



Source: OECD Broadband Portal, BTK

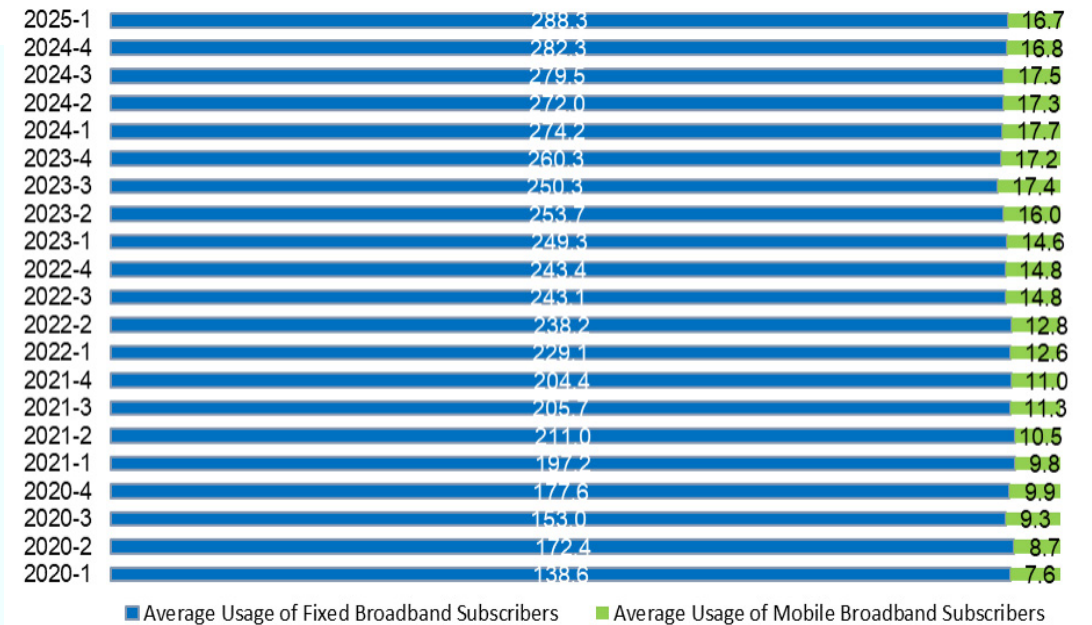
² Data for OECD countries are as of June 2024, and data for Türkiye are as of March 2025.

3.3 USAGE AMOUNTS

Mobile broadband service, which was introduced in July 2009, saw a 0.8% decrease in the number of mobile internet subscribers via computer and mobile phone compared to the previous quarter, reaching 75.3 million. During this period, the total volume of mobile internet usage declined by 1.4% compared to the previous quarter, amounting to 3.69 million TBytes. In the first quarter of 2025, the total fixed broadband internet usage (including cable internet), comprising both downloads and uploads, increased by 3.1% and reached 17.47 million TBytes.

Figure 3-3 presents the average monthly data usage per subscriber for fixed broadband (including cable internet) and mobile broadband via computer and mobile phone. In the first quarter of 2025, the average monthly usage of fixed broadband internet subscribers was 288.3 GBytes, while that of mobile broadband internet subscribers was 16.7 GBytes. Compared to the previous quarter, the average monthly usage per fixed broadband subscriber increased by 2.1%, whereas the average monthly usage per mobile broadband subscriber decreased by 0.6%.

Şekil 3-3 Average Monthly Usage per Subscriber, GByte



3.4 DISTRIBUTION OF SUBSCRIBERS BY SPEED AND USAGE

Figure 3-4 presents the distribution of fixed broadband internet subscribers by connection speed. In the first quarter of 2025, approximately 12.1% of fixed broadband subscribers in Türkiye preferred packages offering speeds between 10–16 Mbps, while 13.3% opted for speeds between 16–24 Mbps. Additionally, 40.5% of subscribers chose connections with speeds between 24–50 Mbps, and 32.0% preferred connections offering speeds above 50 Mbps.

Figure 3-4 Distribution of Fixed Broadband Internet Subscribers by Connection Speed, %

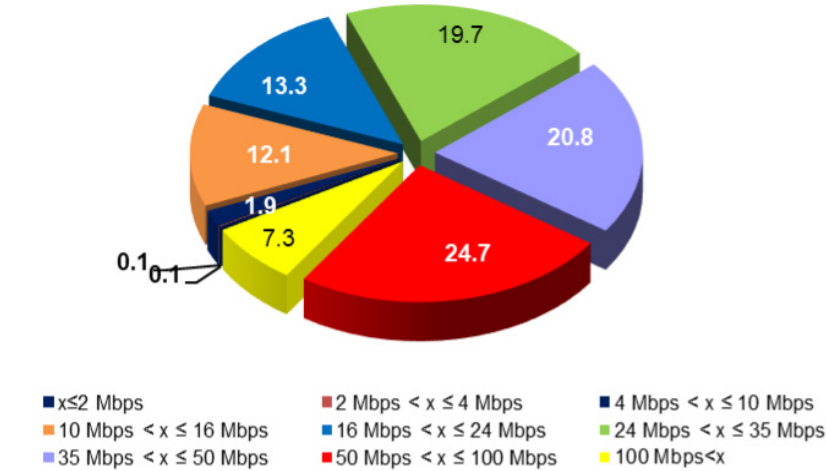


Figure 3-5 shows the distribution of mobile internet subscribers (via computer) based on their data usage. The figure indicates that 72% of subscribers used more than 100 MBytes. In contrast, 25% of subscribers fall within the 0–50 MByte range, representing the lowest usage group.

Figure 3-5 Distribution of Mobile Internet Subscribers (via Computer) by Usage, %

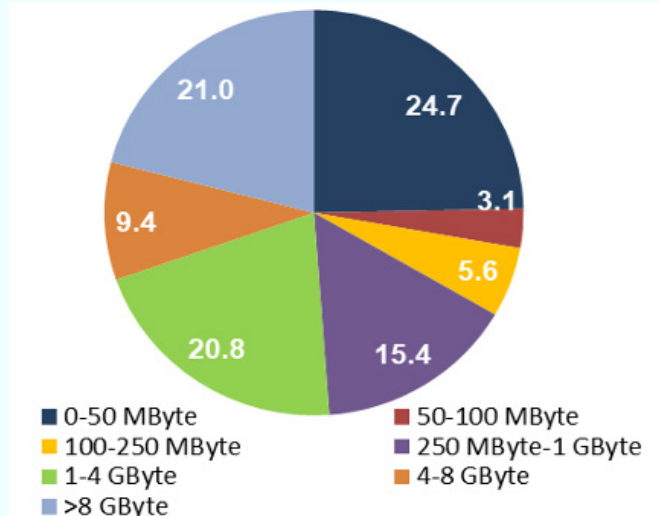
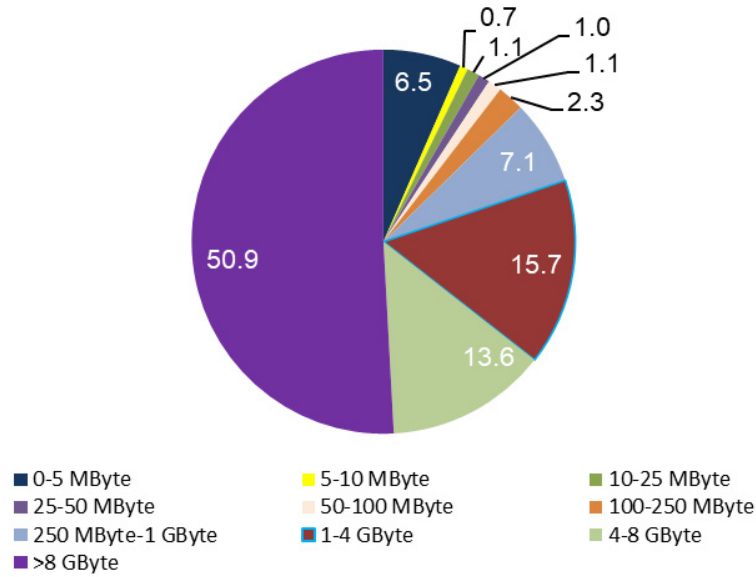


Figure 3-6 presents the distribution of mobile internet subscribers (via mobile phone) based on their data usage. Among these subscribers, 90% have a usage exceeding 100 MBytes. The distribution also shows a concentration in the usage segment above 8 GBytes, which accounts for 51% of subscribers.

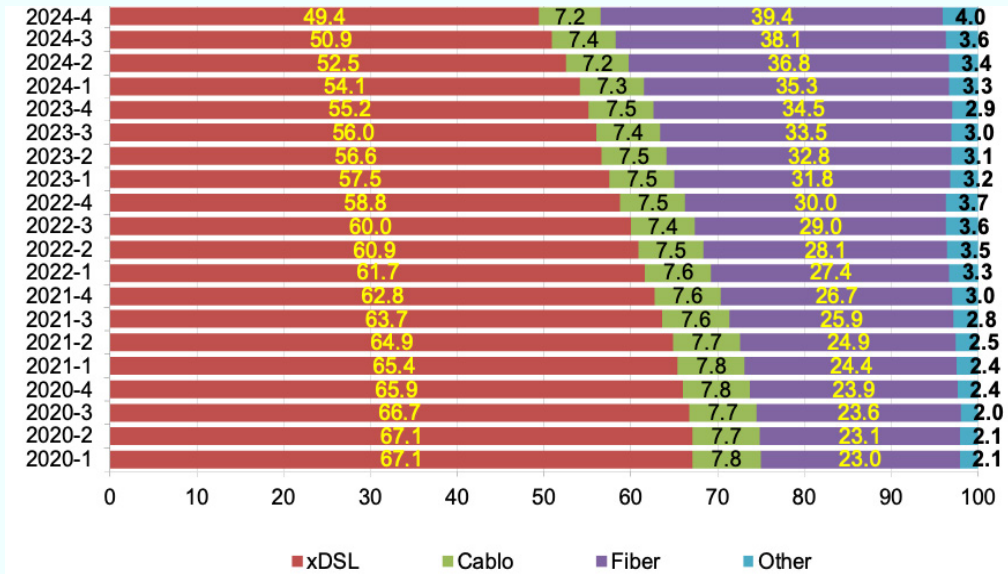
Figure 3-6 Distribution of Mobile Internet Subscribers (via Mobile Phone) by Usage, %



3.5 DISTRIBUTION OF SUBSCRIBERS BASED ON TECHNOLOGY

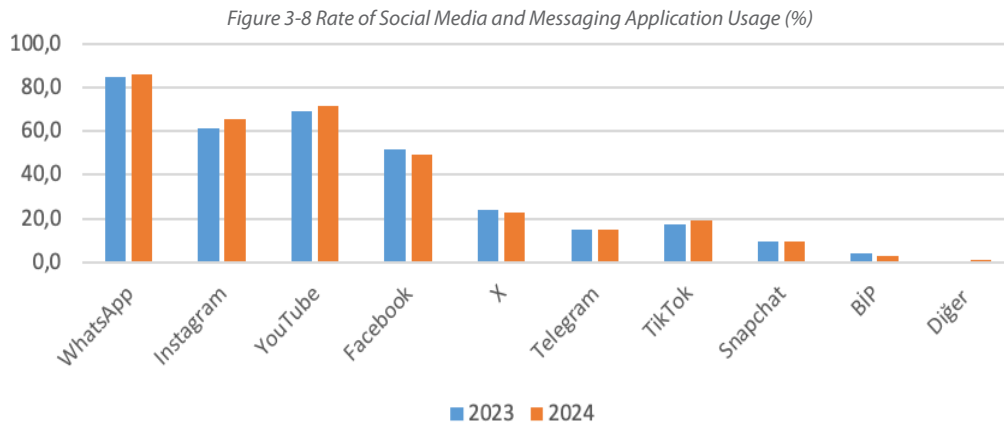
Figure 3-7 shows the distribution of fixed broadband subscribers in Türkiye by technology. The share of subscribers receiving service with xDSL technology in the total fixed broadband market continued to decline as of the fourth quarter of 2024, falling to 49.4%. While the market share of subscribers receiving cable internet service was 7.2%, the share of subscribers receiving fiber internet service in the total fixed broadband market continued to increase, reaching 39.4%.

Figure 3-7 Distribution of Fixed Broadband Subscribers by Technology, %



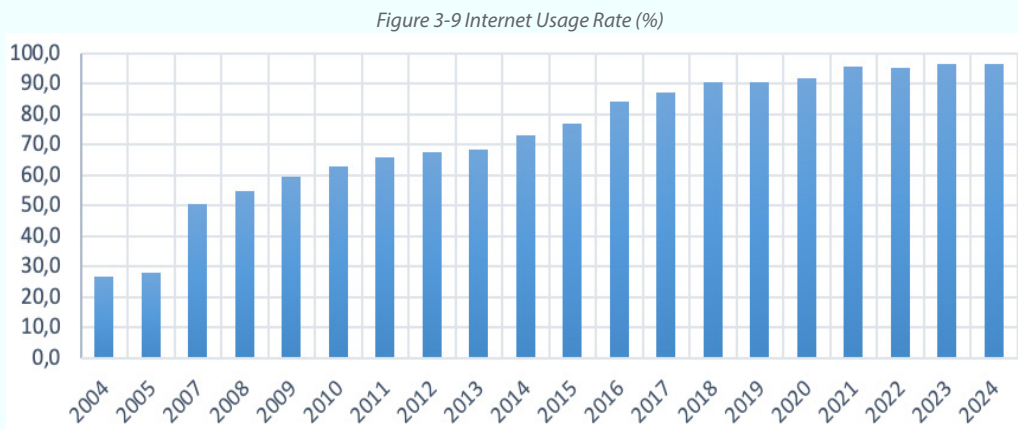
3.6 INTERNET USAGE HABITS

The Turkish Statistical Institute (TÜİK) conducts the Household Information Technologies Usage Survey on an annual basis and publishes the results each year in August. This survey is conducted using a questionnaire method. Figure 3-8 presents the rates of social media usage among internet users within the last three months, based on data published in August 2024. According to the survey results, the top three platforms used for social media are WhatsApp, Instagram, and YouTube, respectively.



TÜİK, Household Information Technologies (IT) Usage Survey, 2024

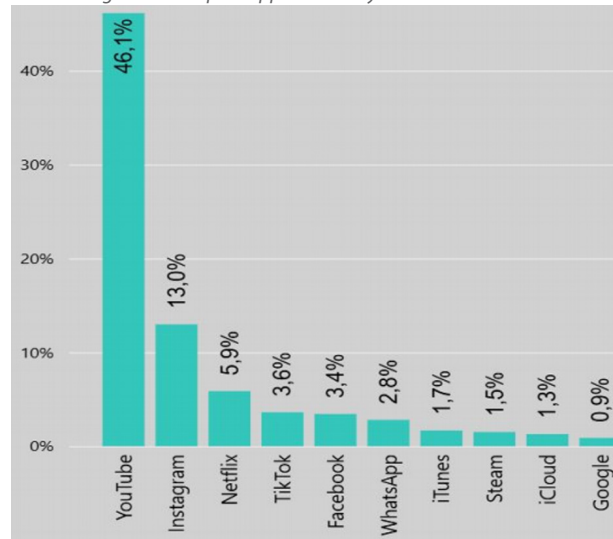
According to the results of the Household Information Technologies Usage Survey conducted by TÜİK, the internet usage rate was 27% in 2004. Over the course of approximately twenty years, this rate has increased by 3.6 times, reaching 97%, as shown in Figure 3-9.



TÜİK, Household Information Technologies (IT) Usage Survey, 2004-2024

Figure 3.10 presents the top 10 applications across all categories based on total internet traffic. As shown in the chart, YouTube stands out by a wide margin as the application with the highest share of total internet traffic. With a traffic share of 46.1%, YouTube leads in user data consumption, followed by Instagram with 13.0% and Netflix with 5.9%. Other popular social media and communication applications such as TikTok (3.6%), Facebook (3.4%), and WhatsApp (2.8%) also generate significant amounts of traffic. These figures indicate that user behavior is largely driven by video content consumption and that social media platforms account for a substantial share of internet traffic.

Figure 3-10 Top 10 Applications by Total Internet Traffic



According to the data presented in Figure 3-11, the most widely used applications in the Streaming Media category by users are shown. The chart indicates that YouTube is by far the most preferred application. YouTube holds a 60.1% share of total traffic, followed by Instagram with 13.0% and Netflix with 7.6%. Other platforms such as TikTok (4.7%), HTTP media streaming services (2.7%), Facebook (2.6%), and iTunes (2.2%) also have notable shares. These figures highlight the dominant role of video content platforms in digital media consumption and reveal that user preferences are largely oriented toward audiovisual content.

Figure 3-11 Applications Used in the Streaming Media Category

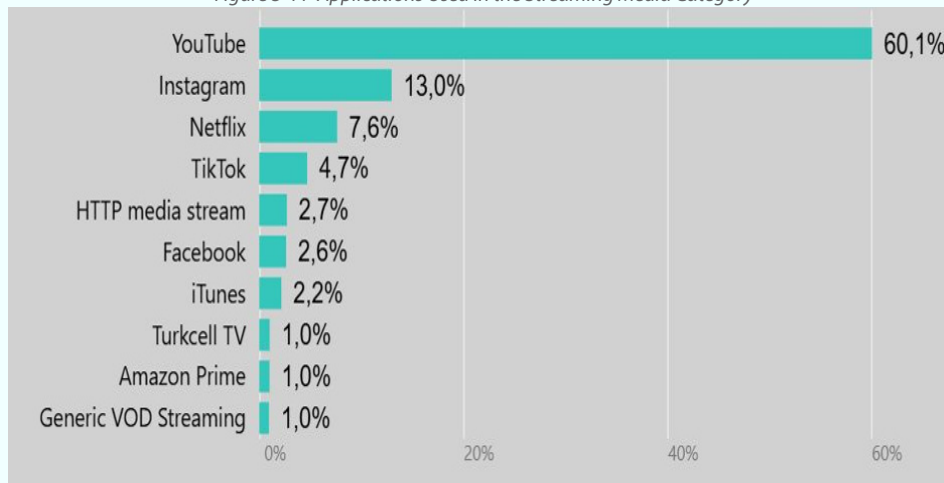


Figure 3-12 displays the most commonly used applications in the Instant Messaging category. According to the data presented in the chart, Instagram is the most widely used application in this category, with a 55.0% share. It is followed by WhatsApp (14.8%), Facebook (13.0%), and Telegram (11.0%), respectively. These four applications account for the majority of total traffic and stand out as the primary platforms meeting users' instant communication needs. The data indicate that users are increasingly gravitating toward social media-based platforms for instant messaging, while the use of traditional messaging services is steadily declining.

Figure 3-12 Applications Used in the Instant Messaging Category

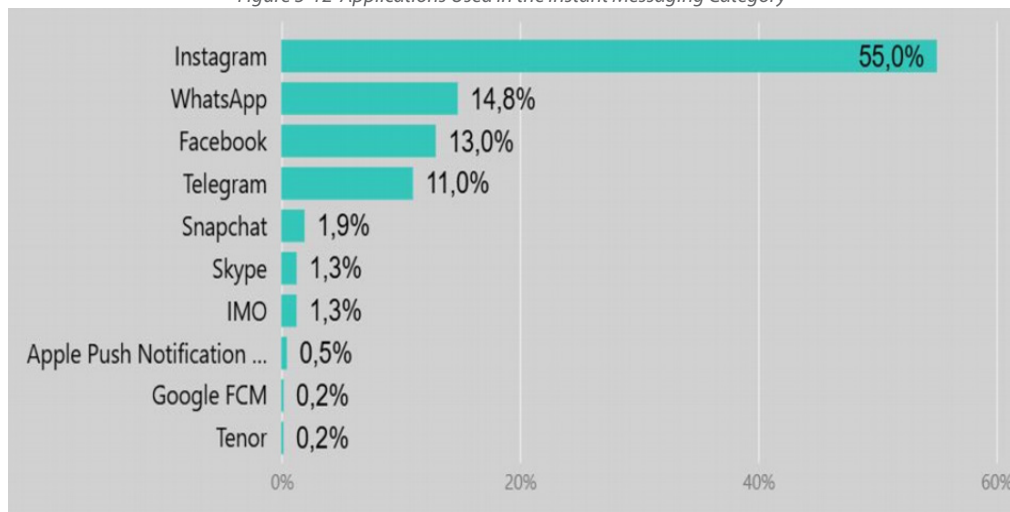


Figure 3-13 presents the most widely used applications in the VOIP (Voice over IP) category. According to the chart, WhatsApp is by far the most commonly used application in this category, accounting for 57.1% of total usage traffic and holding a leading position. It is followed by FaceTime (10.5%), Snapchat (7.5%), Facebook (4.7%) and RTP (4.2%). These top five applications are the primary choices for users' telephony and video communication needs. Meanwhile, solutions aimed at both corporate and individual use—such as Zoom (2.2%), Google Meet (1.8%), Microsoft Teams (1.5%), and Skype (0.9%)—also play significant roles within the VOIP category. These figures indicate that mobile-based communication applications have become dominant in VOIP traffic, and that a multi-purpose usage pattern has emerged alongside traditional video conferencing tools.

Figure 3-13 Applications Used in the VOIP Category

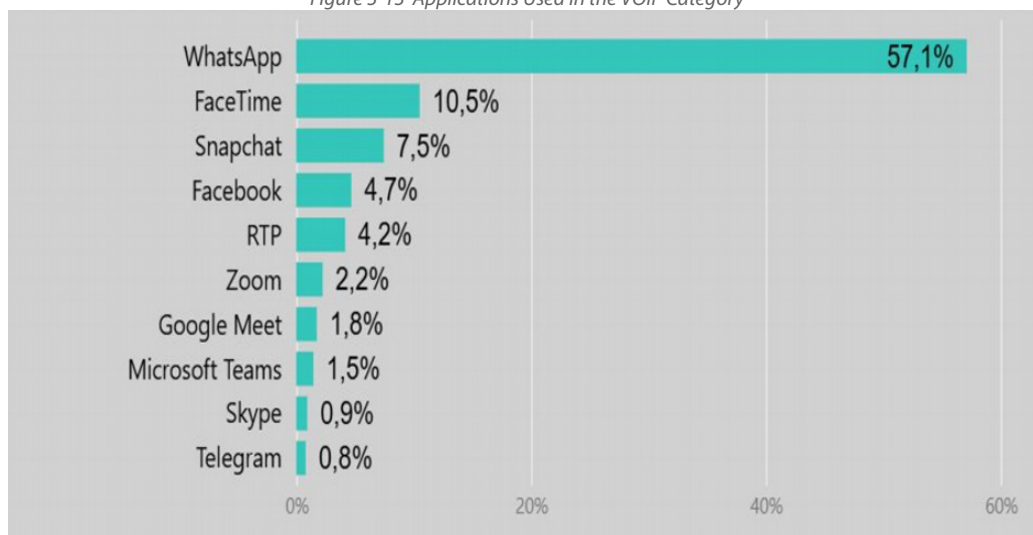


Figure 3-14 presents the most widely used applications in the Online Games category. According to the data in the chart, Steam is by far the most commonly used platform in this category, accounting for 42.9% of internet traffic—nearly half. Steam stands out as the primary platform for accessing gaming content. It is followed by PUBG (8.2%), Epic Games (7.3%), and both Xbox and AppLovin (6.2% each). Other notable platforms include League of Legends (6.0%), Unity (3.3%), EA Games (3.0%), and Valorant (2.5%), which are based on individual games or game engines.

These figures demonstrate that online gaming traffic is largely concentrated on multiplayer platforms with high content volume, while mobile and independent games also command a significant user base.

Figure 3-14 Applications Used in the Online Games Category

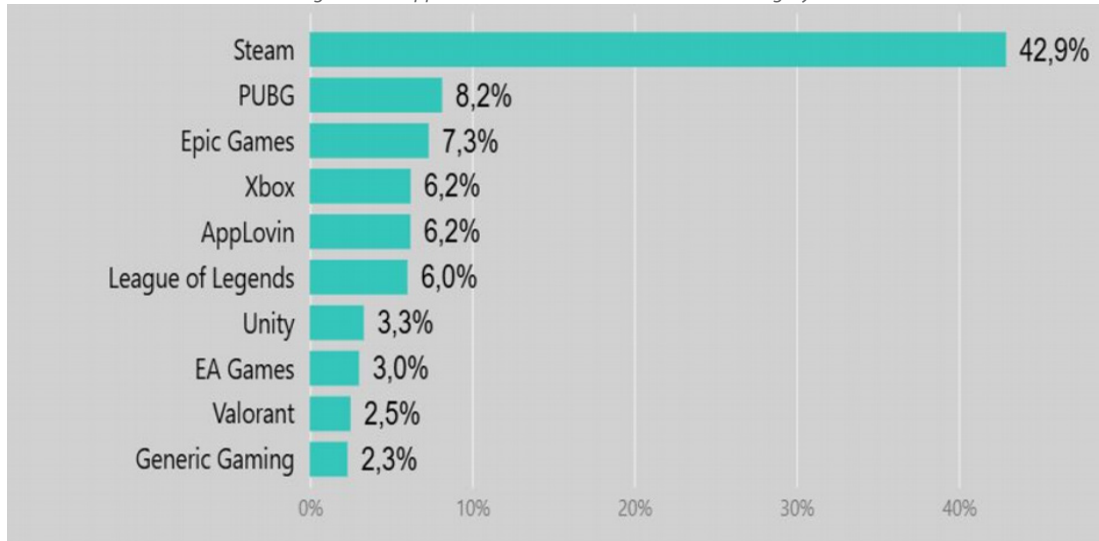


Figure 3-15 presents the most commonly used applications in the Network Storage category. According to the chart, iCloud is the most widely used application by users in this category, leading by a wide margin with a 52.8% share. iCloud is particularly preferred for data synchronization and backup services among devices within the Apple ecosystem. It is followed by Google Cloud Storage (14.2%) and Google Photos (11.7%). Other services such as OneDrive (2.8%), Fastly (2.2%), and Google APIs (1.7%) are also used by specific user groups.

Among the remaining applications are Google Drive, Google Ads, Yandex Disk, Samsung Cloud, Microsoft Azure, WeTransfer, and FTP transfer, offering various storage and data transfer solutions preferred by both individual and corporate users. These figures indicate that Apple and Google services dominate the cloud storage market, while integrated solutions related to data sharing, advertising, and software services also hold significant positions within this category.

Figure 3-15 Applications Used in the Network Storage Category

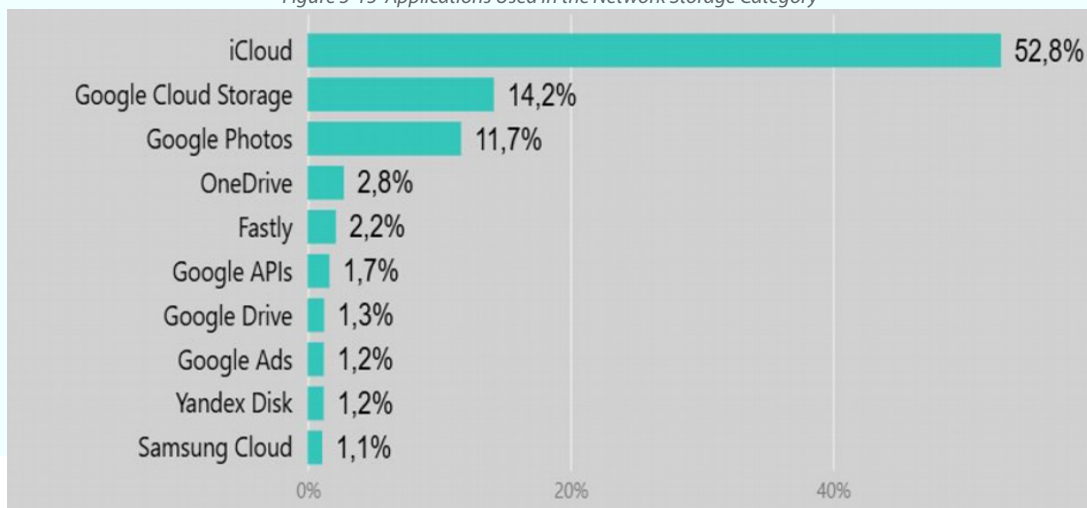


Figure 3-16 presents the most commonly used applications in the Web Browsing category. According to the chart, the QUIC protocol generates the highest traffic in this category, standing out with a significant lead at 39.1%. QUIC is widely used in modern web browsing experiences due to its low latency and faster connection establishment. It is followed by SSL v3 (10.5%) and Google services (6.2%). Other notable encryption and content delivery services include Encrypted (5.2%), Facebook (3.8%), Cloudflare (3.0%), and TLS 1.3 (2.9%). These figures indicate that internet users predominantly prefer services that provide secure, optimized, and fast connections, and that modern web experiences heavily rely on advanced technologies and protocols operating in the background.

Figure 3-16 Applications Used in the Web Browsing Category

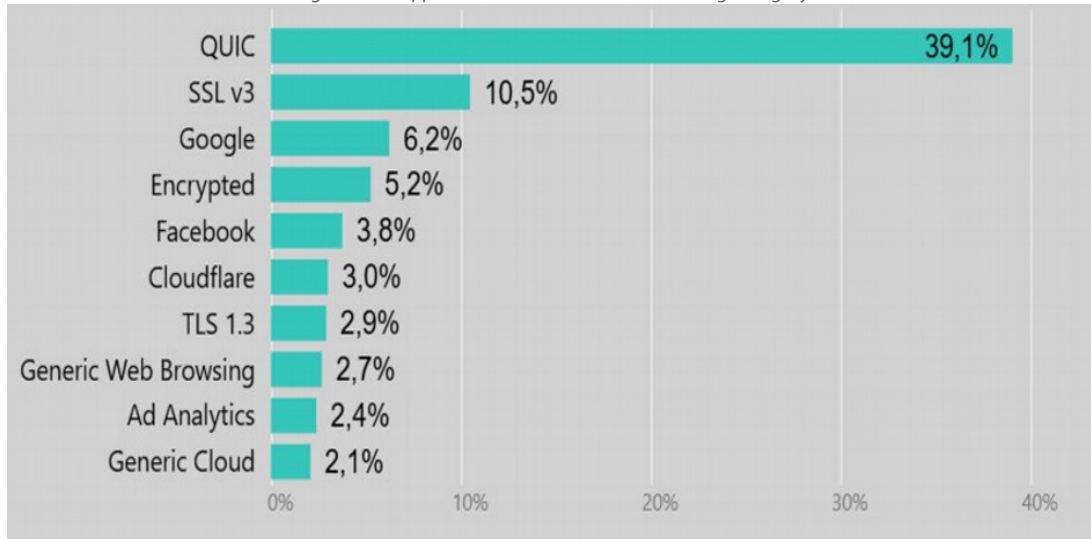


Figure 3-17 presents the most widely used applications in the Software Updates category. According to the chart, Google Play generates the highest traffic in this category, leading with a 22.3% share. It is followed by Apple Software Update (21.5%) and PlayStation updates (19.9%). These three platforms dominate the total update traffic. Additionally, other notable software sources include Windows Updates (10.0%), ByteDance (4.4%), Microsoft Office 365 (4.1%), and HTTP DownloadManager (3.2%). Various update services aimed at mobile and desktop devices—such as Samsung Galaxy Apps, App Store, Android Updates, Huawei AppGallery, and Apple Services—are also featured in the list, reflecting the update practices across different ecosystems. These figures show that software updates are primarily driven by major platform providers (Google, Apple, Microsoft, and Sony), and that user devices are continuously updated for security, performance, and functionality.

Figure 3-17 Applications Used in the Software Updates Category

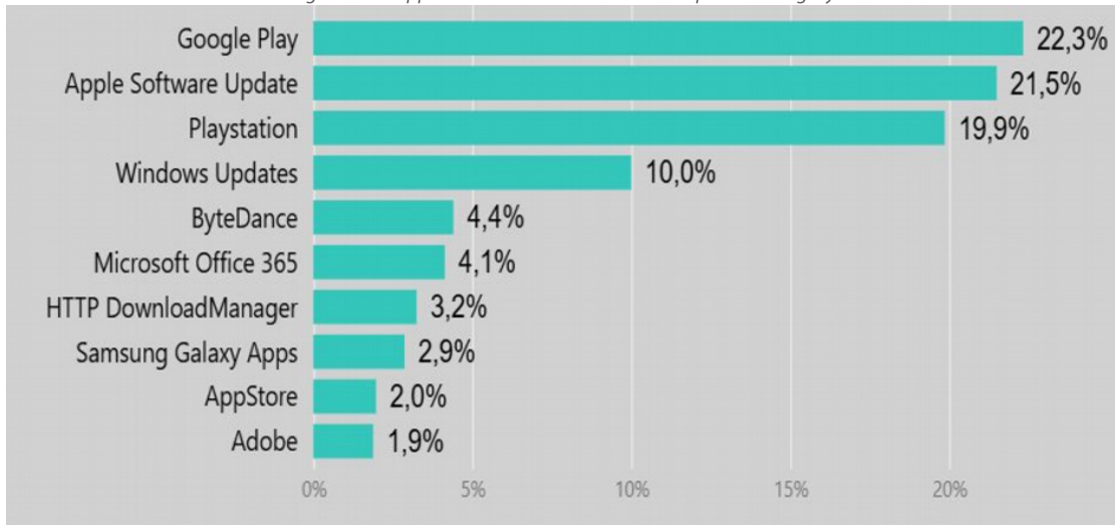
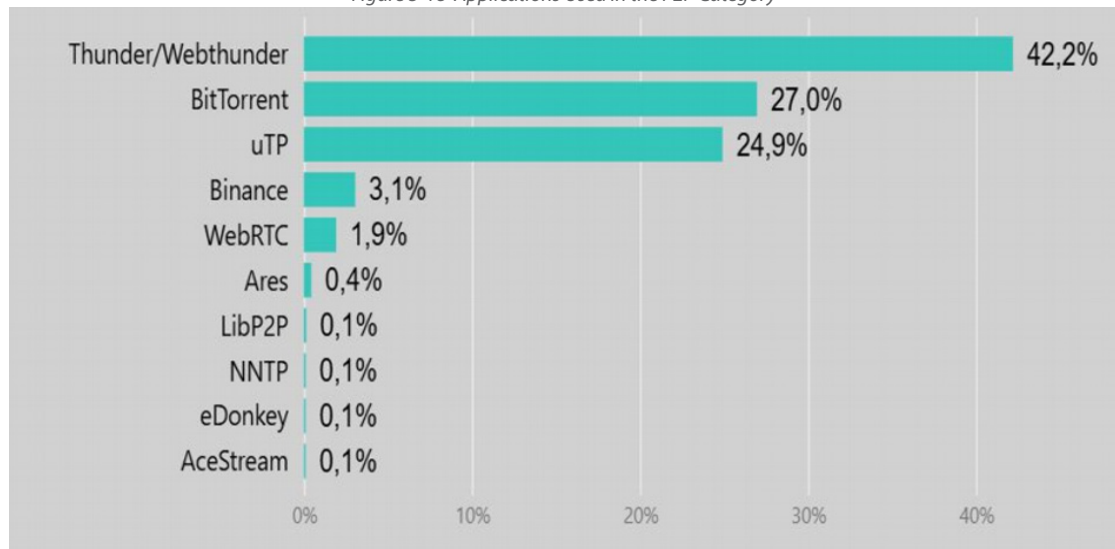


Figure 3-18 presents the most widely used applications in the P2P (Peer-to-Peer) category. According to the chart, Thunder/WebThunder is the most commonly used application in this category, leading by a significant margin with a 42.2% share. It is followed by BitTorrent (27.0%) and uTP (Micro Transport Protocol) (24.9%). These figures indicate that P2P networks are largely maintained through a small number of dominant protocols, and that traditional applications are increasingly being replaced by more integrated solutions.

Figure 3-18 Applications Used in the P2P Category





PART 4

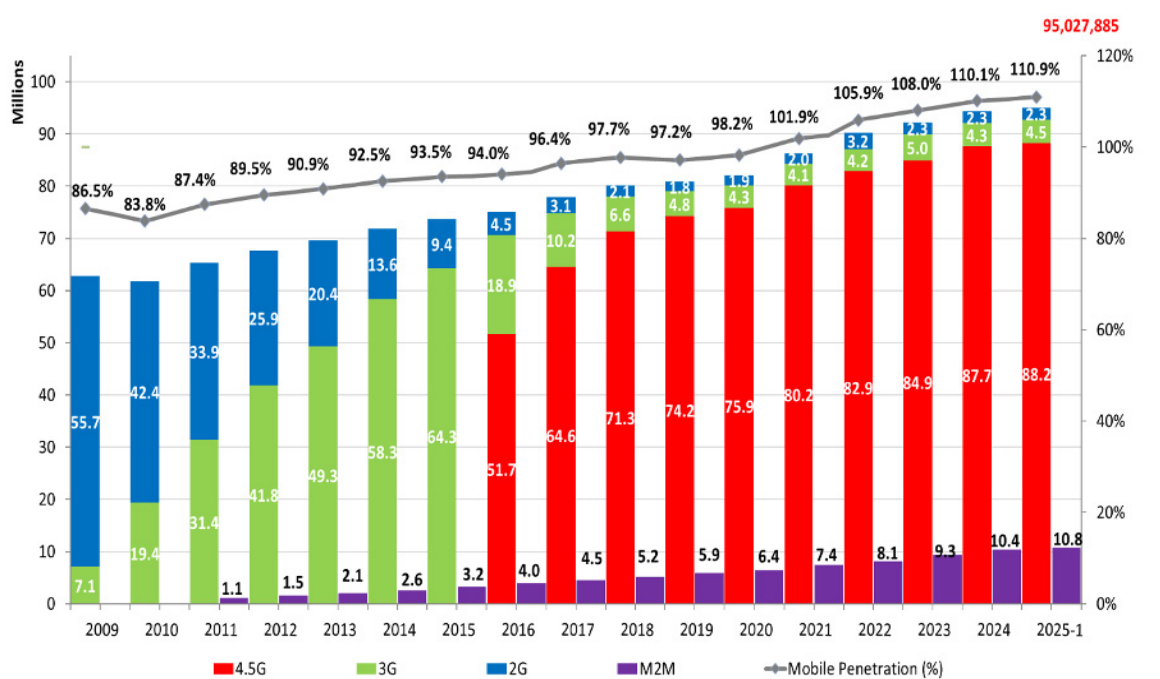
**MOBILE
MARKET DATA**

4 MOBILE MARKET DATA

4.1 NUMBER OF SUBSCRIBERS AND PENETRATION

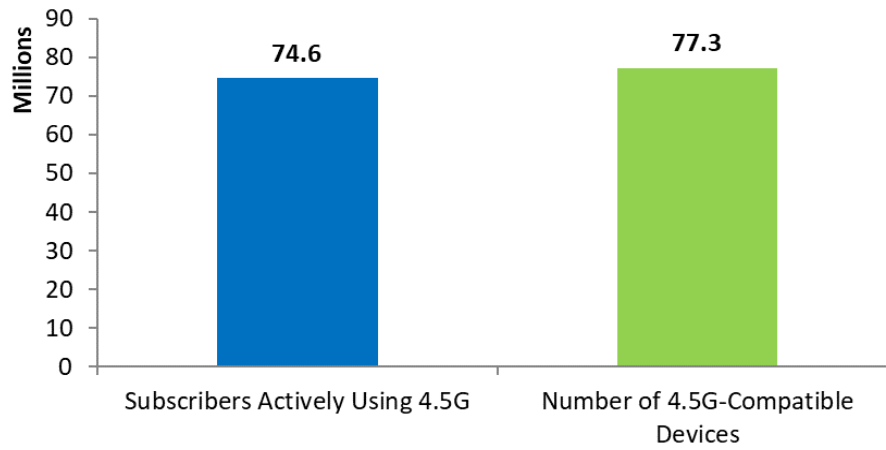
As of the end of March 2025, there are a total of 95,027,885 mobile subscribers in Türkiye, including machine-to-machine (M2M) subscribers, corresponding to a penetration rate of approximately 110.9%. The 3G service, which was launched in July 2009, reached 65.949.652 subscribers as of the end of March 2016, but with the launch of 4.5G on April 1, 2016, there was a rapid transition from 3G subscriptions to 4.5G subscriptions. As of the end of March 2025, the number of 3G subscribers was 4,546,099, while the number of 4.5G subscribers increased to 88,184,767. Figure 4-1 compares the number of 2G, 3G, and 4.5G mobile subscribers and penetration rates by year. On the other hand, as of the end of March 2025, the number of machine-to-machine communication (M2M) subscribers was 10.8 million.

Figure 4-1 Total Number of Mobile Subscribers and Penetration Rate



For the 4.5G service that started on April 1, 2016, the number of “active 4.5G subscribers” (the number of subscribers whose devices and SIM cards are compatible with 4.5G service) was 74,597,779 at the end of March 2025, while the number of 4.5G compatible devices was 77,345,436 (Figure 4-2).

Figure 4-2 Number of Active 4.5G Mobile Subscribers and Compatible Devices



Based on the assumption that mobile devices are generally used by people over the age of 9, mobile penetration rates were calculated in Figure 4-3, excluding the 0-9 age population and M2M users. Accordingly, it is seen that the mobile penetration rate is 113.5 %.³

Figure 4-3 The Number of Mobile Subscribers and Penetration Rate Based on Population Excluding Ages 0-9⁴

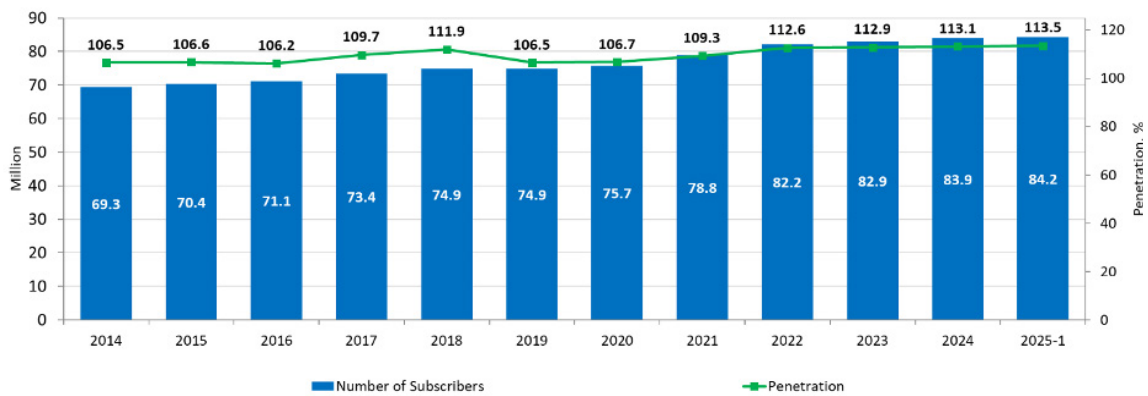


Table 4-1 presents data on 3G and 4.5G services. In the first quarter of 2025, the number of 3G subscribers was 4,546,099, while the number of 4.5G subscribers reached 88,184,767. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with 3G and 4.5G services was 75,284,037, and the number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with only 4.5G service was 70,690,070. The total mobile Internet usage amount in the first quarter of 2025 was 3,690,971 TBytes, and the total mobile Internet usage amount of 4.5G users was 3,576,414 TBytes.

³ As of December 31, 2024, the population of Türkiye, excluding the population aged 0-9, is 74,197,473 (TurkStat)

⁴ The graph has been prepared by excluding the subscriber numbers of M2M in order to reflect the usage by real individuals.

Table 4-1 3G and 4.5G Service User Data*

	2023-3	2023-4	2024-1	2024-2	2024-3	2024-4	2025-1
Number of 3G Subscribers	5,084,258	4,993,823	4,967,065	4,689,475	4,610,156	4,345,125	4,546,099
Number of 4.5G Subscribers	85,397,899	84,924,804	85,629,126	86,341,351	87,537,163	87,662,081	88,184,767
Number of Mobile Computer Internet Users (Total)	704,564	669,193	666,345	747,220	737,030	706,492	757,744
Number of Mobile Computer Internet Users (4.5G)	550,074	517,418	519,177	600,762	569,586	567.414	608,625
Mobile Internet Usage via Handsets (Total)	74,129,168	73,046,184	73,727,551	74,865,156	75,633,373	75,180,553	74,526,293
Mobile Internet Usage via Handsets (4.5G)	68,215,521	67,471,805	68,467,226	69,772,287	70,415,172	70.039.380	70,081,445
Mobile Internet Usage via other devices, TByte (Total)	3,813,276	3,719,601	3,853,021	3,825,341	3,919,929	3,744,694	3,690,971
Mobile Internet Usage via other devices, TByte (4.5G)	3,683,753	3,594,813	3,731,462	3,694,187	3,792,346	3,617,609	3,576,414

*Some data are revised due to operators' system updates

Figure 4-4 shows the number of mobile broadband internet subscribers as postpaid and prepaid. As of the first quarter of 2025, the number of prepaid mobile broadband subscribers was 13,508,022 and the number of postpaid mobile broadband subscribers was 60,428,970.

Figure 4-4 Number of Prepaid and Postpaid Mobile Broadband Subscribers, Thousands

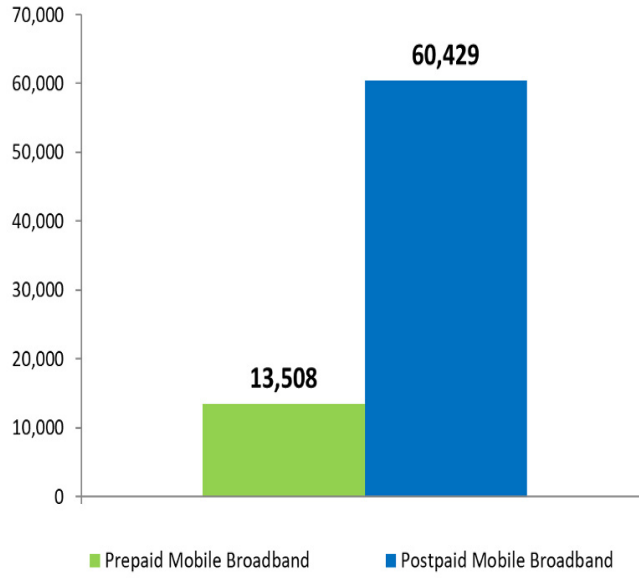
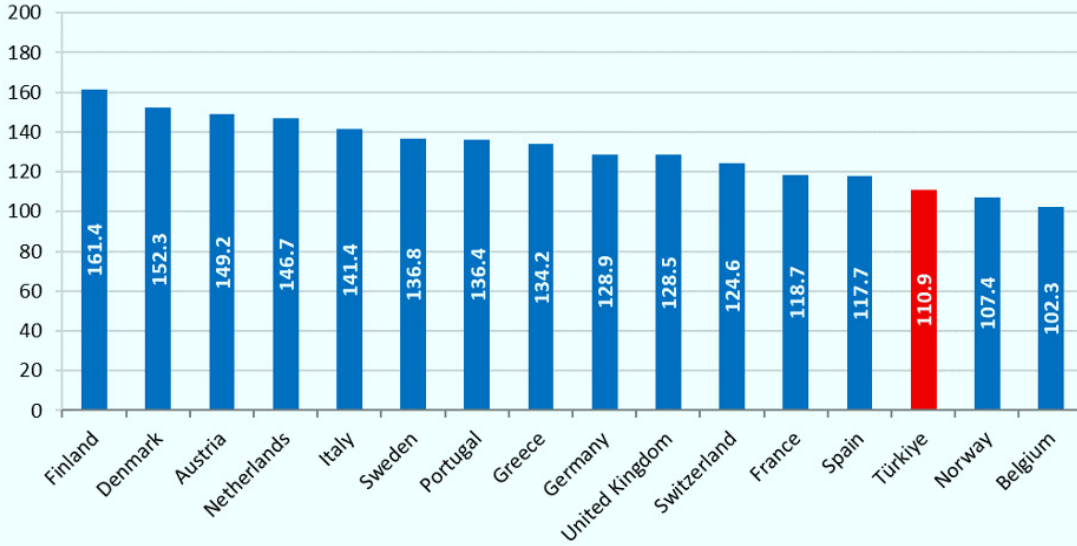


Figure 4-5 compares the mobile penetration rates of Türkiye and some European countries. As of the first quarter of 2025, the ones with the highest mobile penetration rates among European countries are Finland, Denmark, Austria, the Netherlands and Italy. The average mobile penetration rate of the listed countries is approximately 132.4%. In Türkiye, the mobile penetration rate is 110.9% as of March 2025.

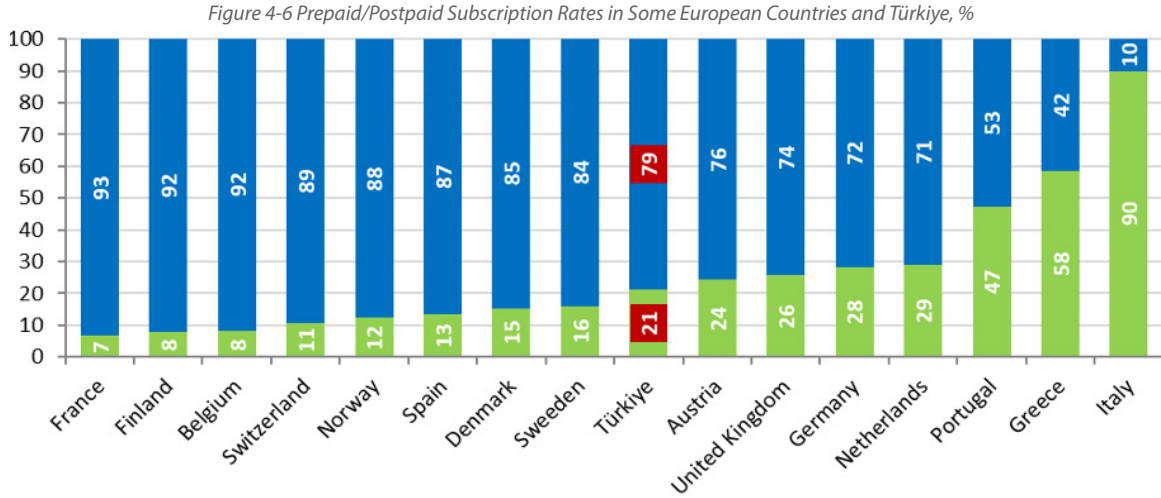
Figure 4-5 Mobile Penetration Rates of Türkiye and Some European Countries, %



Source: GSMA Intelligence 2025-Q1, BTK.

4.2 MOBILE SUBSCRIBER PROFILE

Figure 4-6 compares prepaid and postpaid mobile subscriber percentages in some European countries and Türkiye. The average of prepaid subscriber percentages is 26% in the listed European countries. It is 21% in Türkiye.



Source: GSMA Intelligence 2025-Q1, BTK.

Figure 4-7 shows the total number of subscribers in mobile network operators quarterly. The number of subscribers increased by 1.9% for TT Mobil and by 0.8% for Vodafone, while Turkcell experienced a 0.1% decrease in the first quarter of 2025, compared to the previous quarter.

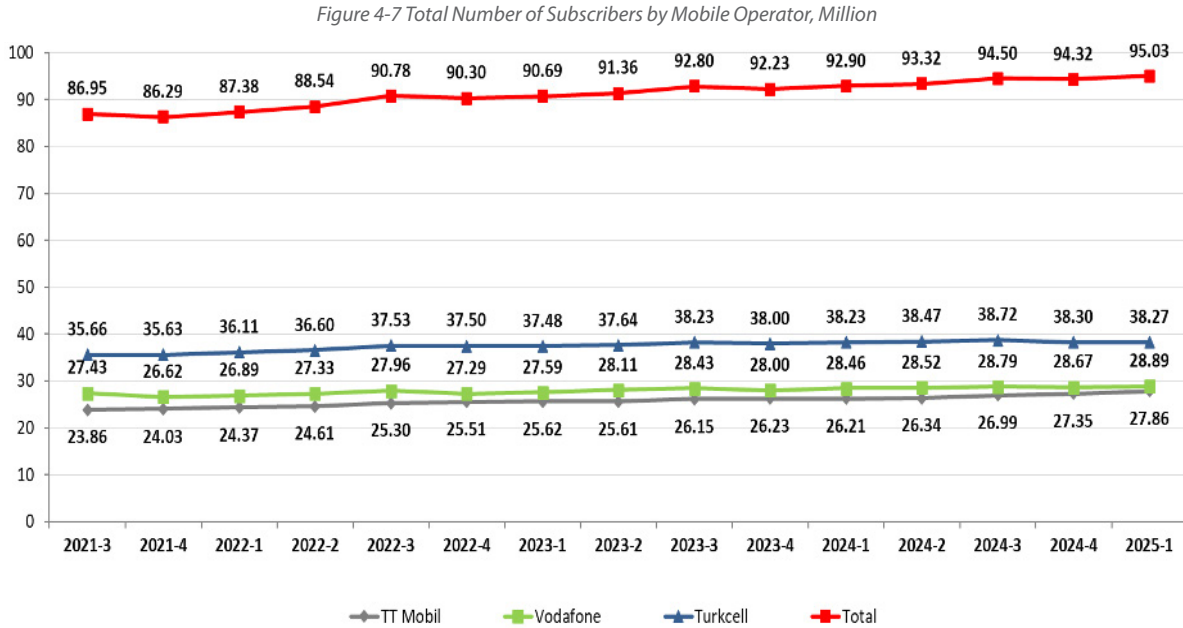


Figure 4-8 presents the number of successfully ported mobile numbers quarterly. In the first quarter of 2025, the number of ported mobile numbers decreased by 30.1% compared to the previous quarter, totaling 3,030,737. As of March 31, 2025, a cumulative total of 193,031,155 numbers are ported.⁵

⁵ Starting from the Q2 2021 report, the total number of ported mobile numbers has been updated to include all number porting transactions up to the end of the respective reporting period.

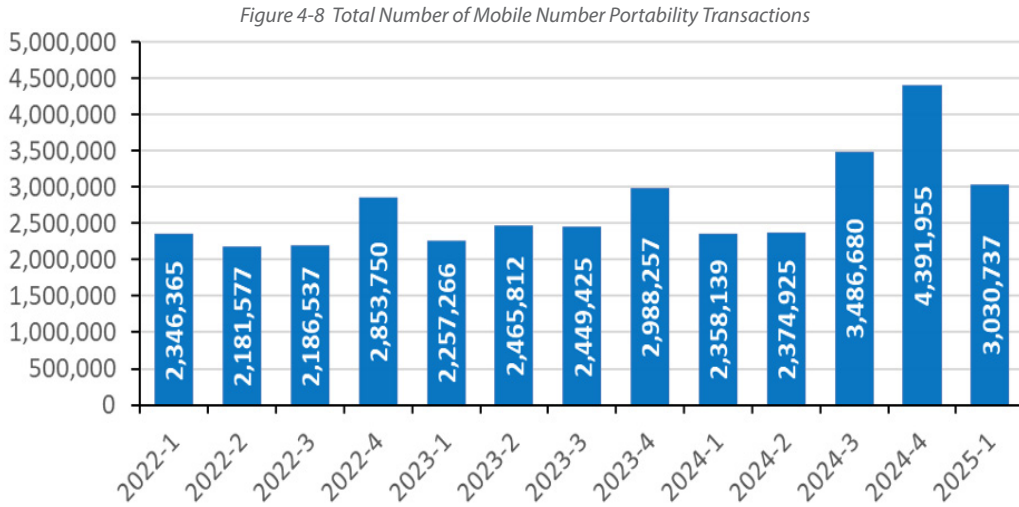


Figure 4-9 presents the quarterly net number of subscribers gained by mobile operators through mobile number portability (MNP). Through the Mobile Number Portability (MNP) service, in the first quarter of 2025, Vodafone gained approximately 62,000 subscribers and TT Mobil gained around 259,000 subscribers, while Turkcell lost approximately 322,000 subscribers.

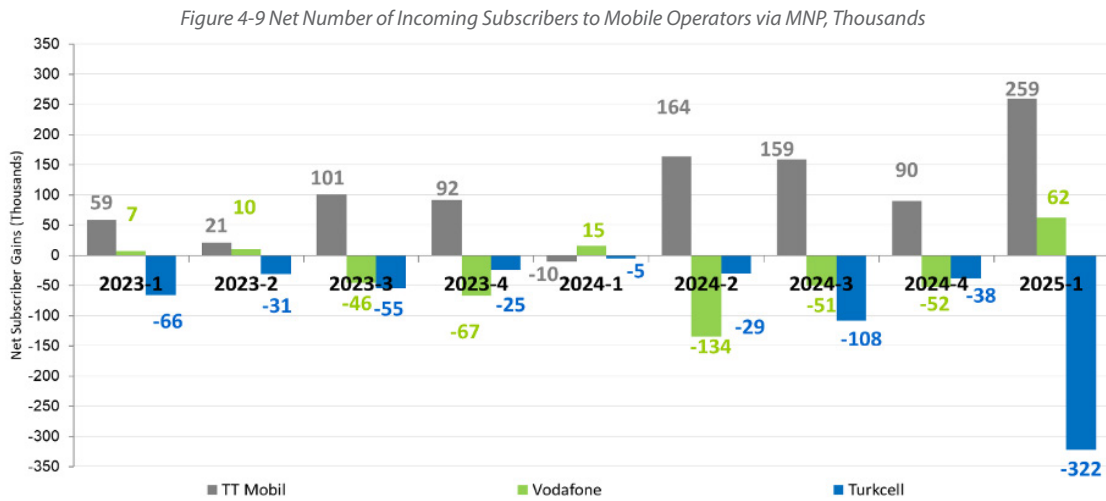


Figure 4-10 shows the market shares of mobile operators based on the number of subscribers. As of the first quarter of 2025, based on the number of subscribers, Turkcell holds a market share of 40.3%, Vodafone 30.4% and TT Mobil 29.3%.

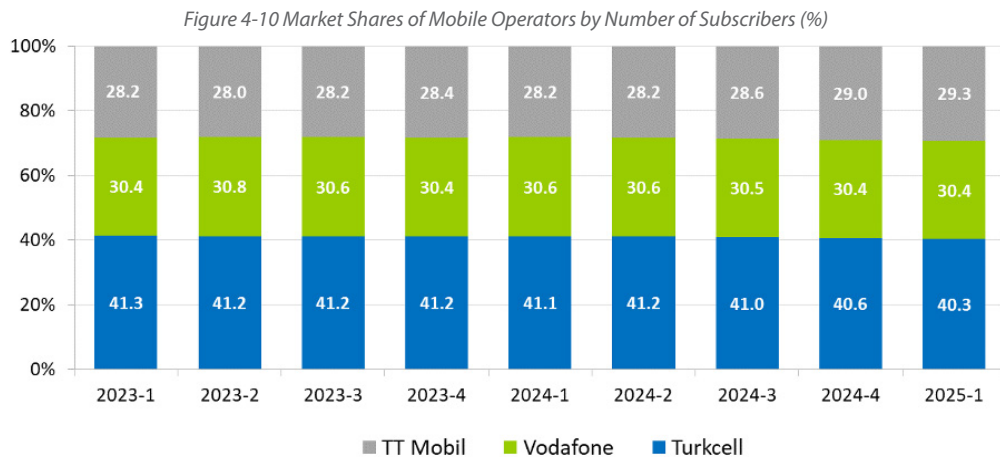


Figure 4-11 presents the monthly subscriber churn rates of mobile operators for the past 12 months, including the first quarter of 2025. As of March 2025, the subscriber churn rates were 2.2% for both TT Mobil and Vodafone, while Turkcell's churn rate was 1.9%.

Figure 4-11 Subscriber Churn Rates of Mobile Operators (%)

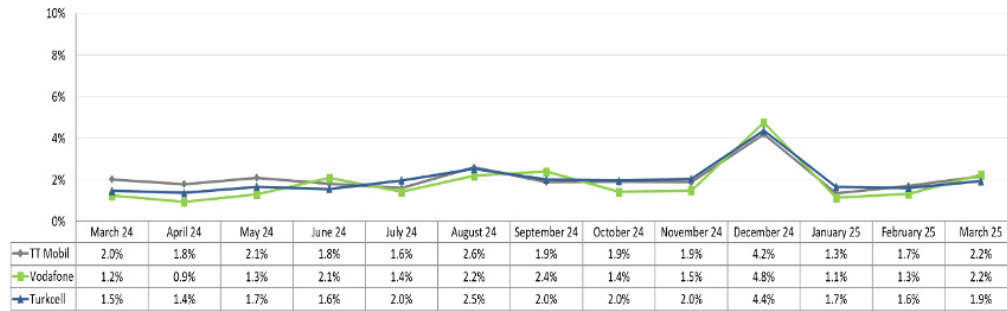
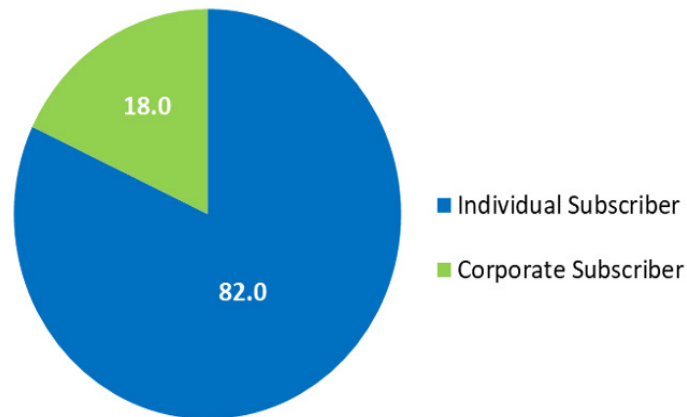


Figure 4-12 examines the subscriber base of mobile operators by type: individual (real persons) vs. corporate (legal entities). As of the first quarter of 2025, approximately 82% of mobile subscribers were personal while 18% were corporate.

Figure 4-12 Distribution of Mobile Subscribers by Type (%)



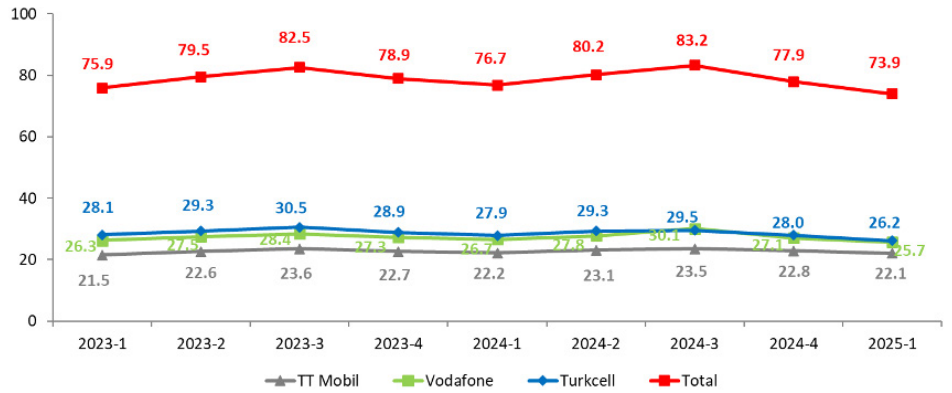
4.3 MOBILE TRAFFIC VOLUME

Total mobile traffic volume in the first quarter of 2025 was 73.9 billion minutes. When traffic data for the first three months of 2025 is compared to the previous three-month period, it is seen that total mobile traffic decreased by 5.1% and by 3.7% compared to the same period of last year.

When examined on an operator basis, it is seen that Turkcell's traffic volume decreased by 6.3%, Vodafone's traffic volume by 5.3% and TT Mobil's traffic volume by 3.4% compared to the previous period. Compared to the same period last year, Turkcell's traffic volume decreased by 6.1%, Vodafone's traffic volume by 3.7% and TT Mobil's traffic volume by 0.5%. The changes in mobile traffic volume⁶ across the periods are presented in Figure 4-13.

⁶ The total traffic volumes of mobile operators are calculated by summing the total outgoing traffic and the on-net (intra-network) traffic.

Figure 4-13 Total Traffic of Mobile Operators by Quarter (Billion Minutes)



The market shares of mobile operators from total mobile traffic by quarter are shown in Figure 4-14. When compared to the previous period, TT Mobil’s market share increased from 29.3% to 29.8%, Vodafone’s market share decreased from 34.8% to 34.7%, and Turkcell’s market share decreased from 35.9% to 35.4%. When compared to the same period of the last year, TT Mobil’s market share increased from 28.9% to 29.8%, Vodafone’s market share remained same at 34.7% and Turkcell’s market share decreased from 36.4% to 35.4%.

Figure 4-14 Market Shares of Mobile Operators by Traffic (%)

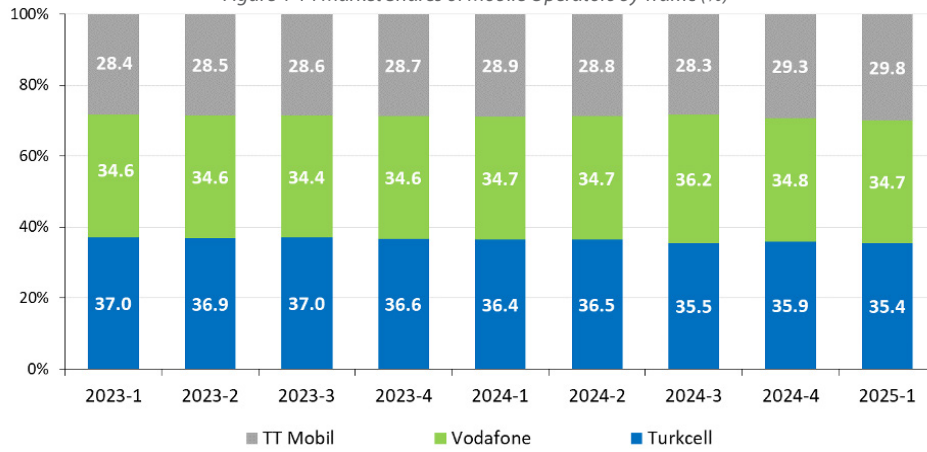
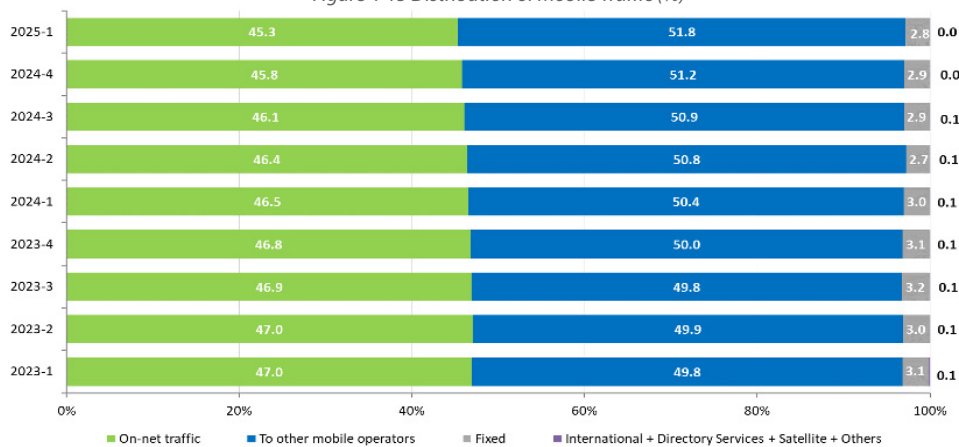


Figure 4-15 presents the distribution of total traffic generated by mobile operators. In the first quarter of 2025, the majority of this traffic (51.8%) is calls from one mobile operator to the other mobile operators. On-net traffic, which refers to calls between subscribers of the same operator, accounted for 45.3% of the total traffic.

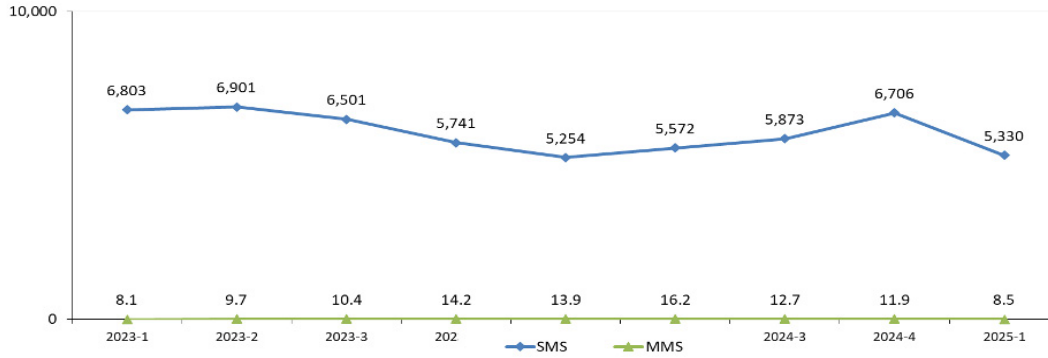
Figure 4-15 Distribution of Mobile Traffic (%)



4.4 SMS AND MMS

The total number of SMS was approximately 5.3 billion, while the number of MMS was around 8.5 million in the first quarter of 2025. (Figure 4-16).

Figure 4-16 SMS and MMS Volumes by Period (Million Messages)



4.5 MOBILE REVENUES

Figure 4-17 shows the annual revenues generated from mobile telecommunication services since 2016 on the basis of International Financial Reporting Standards (IFRS) and Tax Procedural Law (TPL). On IFRS basis, total revenues of ₺135.1 billion in 2023 increased by 89.7% year-on-year to ₺256.2 billion in 2024, while on TPL basis, total revenues of ₺119.4 billion in 2023 increased by 83.9% year-on-year to ₺219.7 billion in 2024.

Figure 4-17 Revenues from Mobile Services by Year, Billion ₺

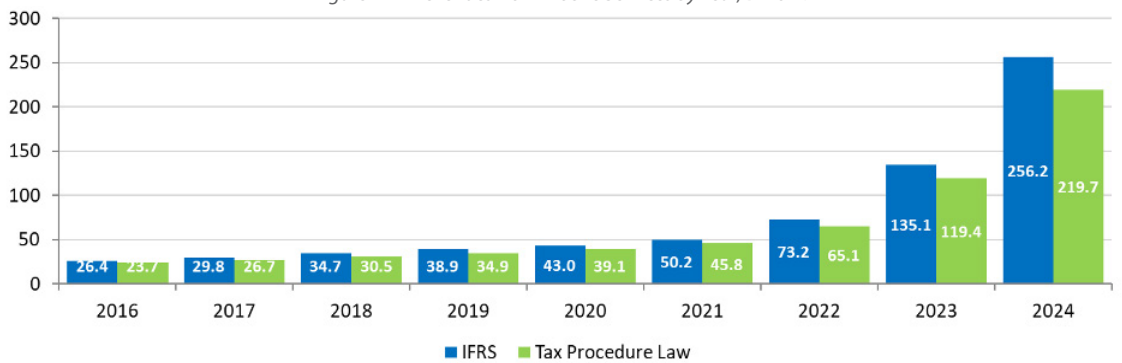
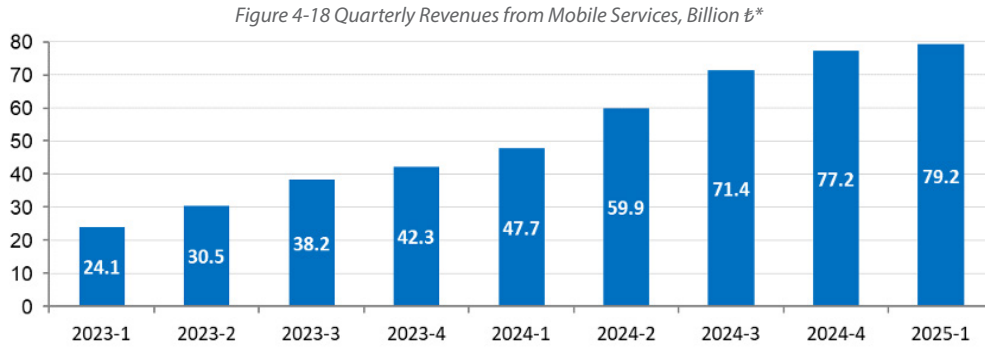


Figure 4-18 shows the quarterly revenues of operators from mobile telecommunication services starting from the first quarter of 2023. In the first quarter of 2025, mobile service revenues amounted to approximately ₺79.2 billion.



*Prepared by taking into account the quarterly revenue figures calculated by the operators through the IFRS (International Financial Reporting Standard) system and sent to our Authority.

Figure 4-19 shows the quarterly market shares of mobile operators based on net sales revenues. As of the first quarter of 2025, Turkcell's market share was 39.9%, Vodafone's market share was 35.3% and TT Mobil's market share was 24.8%. In the first quarter of 2025, compared to the previous period, TT Mobil's market share increased by 1.9, Vodafone's market share increased by 1.1, while Turkcell's market share decreased by 3. Compared to the same period in 2024, TT Mobil's market share increased by 1.6, Vodafone's market share decreased 1.3 and Turkcell's market share decreased by 0.3.

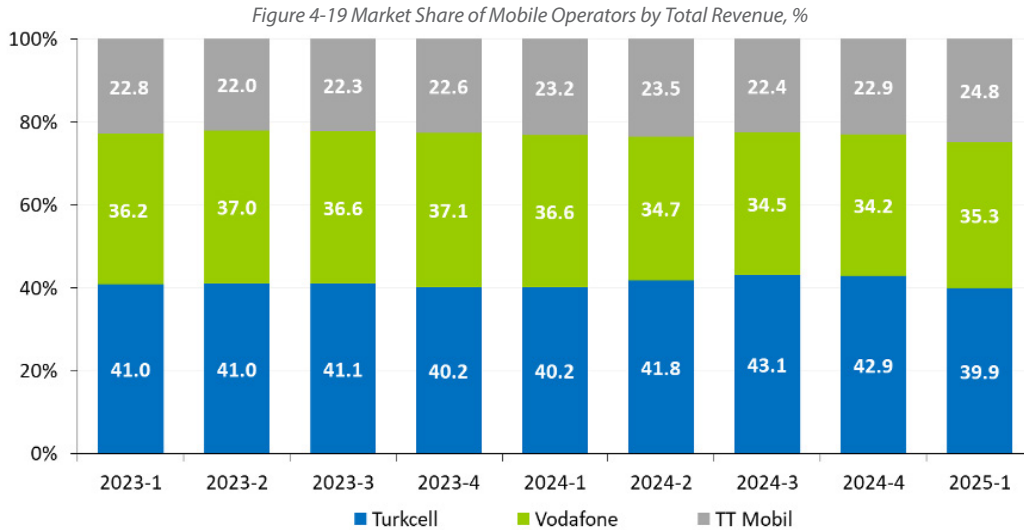
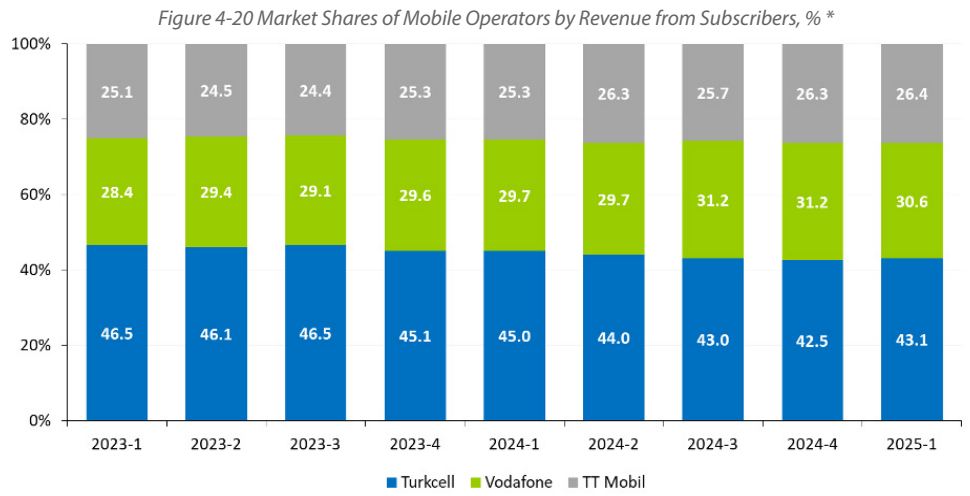


Figure 4-20 shows the market shares of mobile operators based on their revenues from subscribers. As of the first quarter of 2025, Turkcell's market share was 43.1%, while Vodafone and TT Mobil's market shares were 30.6% and 26.4%, respectively.



*The revenues of mobile operators from subscribers are calculated via multiplying the quarterly average ARPU by the number of subscribers (x3).

Figure 4-21 shows the distribution of mobile operators' total revenues by service since 2008. As can be seen from the figure, while 80.9% of mobile operators' revenues were generated from telephony revenues in 2008, this ratio decreased to 8.1% in 2024. The share of data revenues increased from 1.3% in 2008 to 84.9% in 2024. SMS and MMS revenues account for 5.8% of total revenues in 2024.

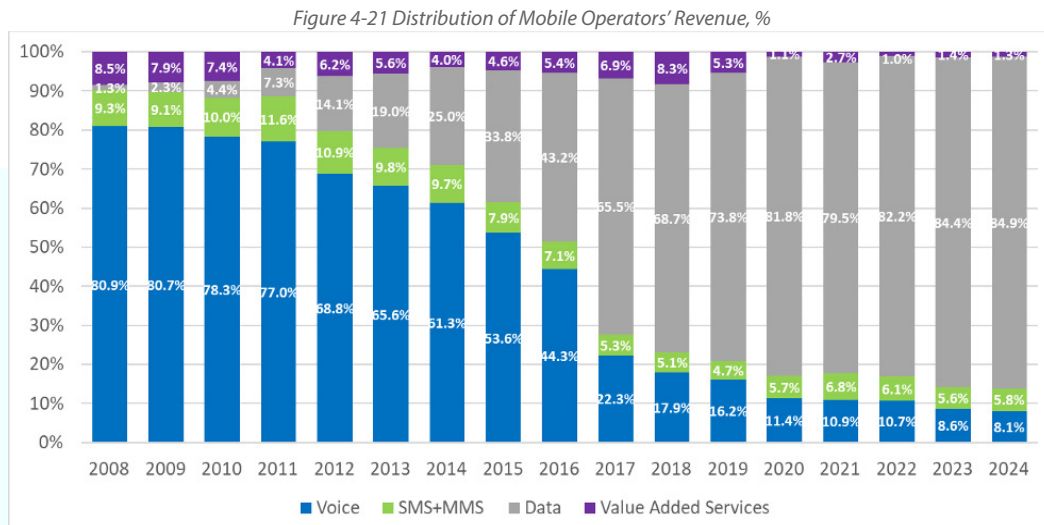
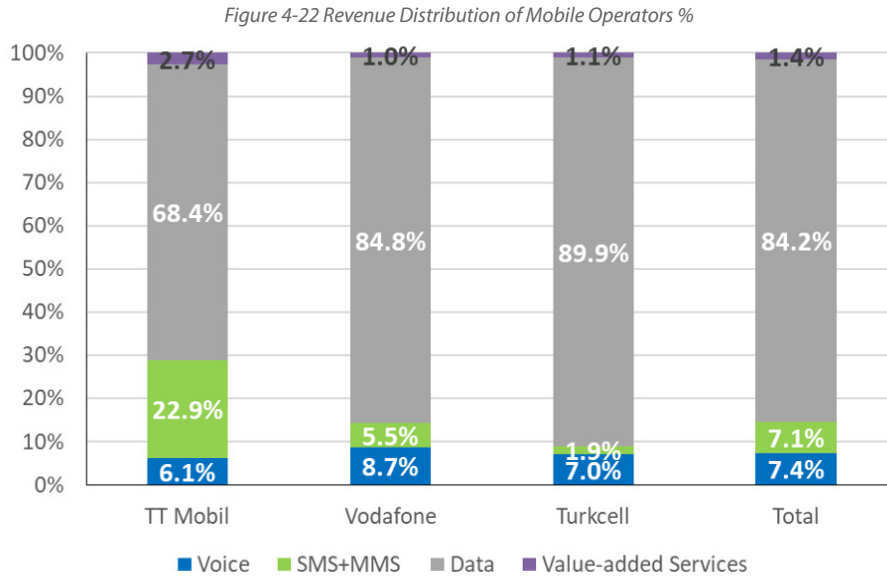


Figure 4-22 presents a comparative breakdown of total revenues of each mobile operator as of the first quarter of 2025. As of the first quarter of 2025, telephony revenues accounted for 6.1% of TT Mobil's revenues, 8.7% of Vodafone's revenues and 7% of Turkcell's revenues. SMS and MMS revenues accounted for 22.9% of TT Mobil's revenues, 5.5% of Vodafone's revenues and 1.9% of Turkcell's revenues. Data revenues accounted for 68.4% of TT Mobil's, 84.8% of Vodafone's and 89.9% of Turkcell's revenues⁷

7 2014-3. As of Q3 2014, M2M revenues are included in data revenues.



4.6 AVERAGE REVENUE PER USER (ARPU)

ARPU which is the average revenue per user is one of the most prominent indicators of how much revenue an operator generates from a subscriber on average in a month; in other words, how much subscribers spend on mobile services on average in a month. Figure 4-23 shows the quarterly average ARPU figures of mobile operators in Türkiye. As of the first quarter of 2025, the average monthly revenue per subscriber for Turkcell is ₺273.9, for Vodafone ₺257.4 and for TT Mobil ₺230.2.

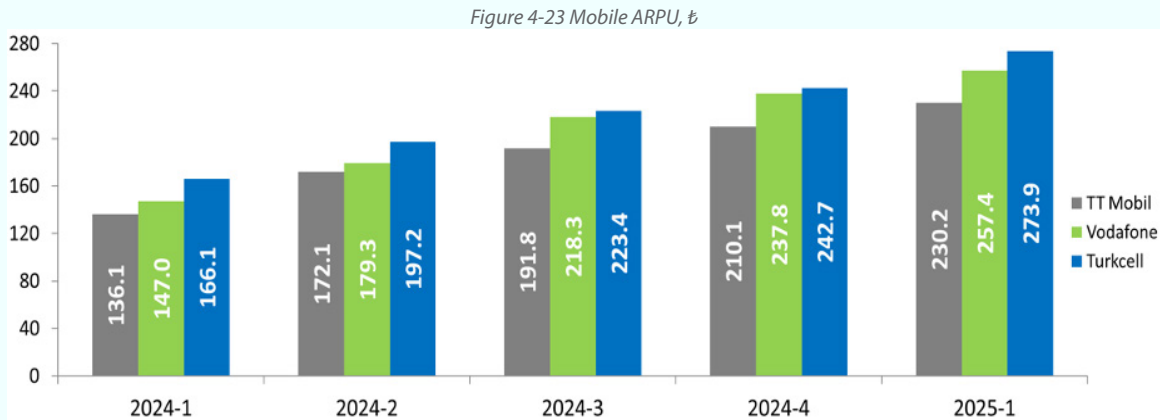
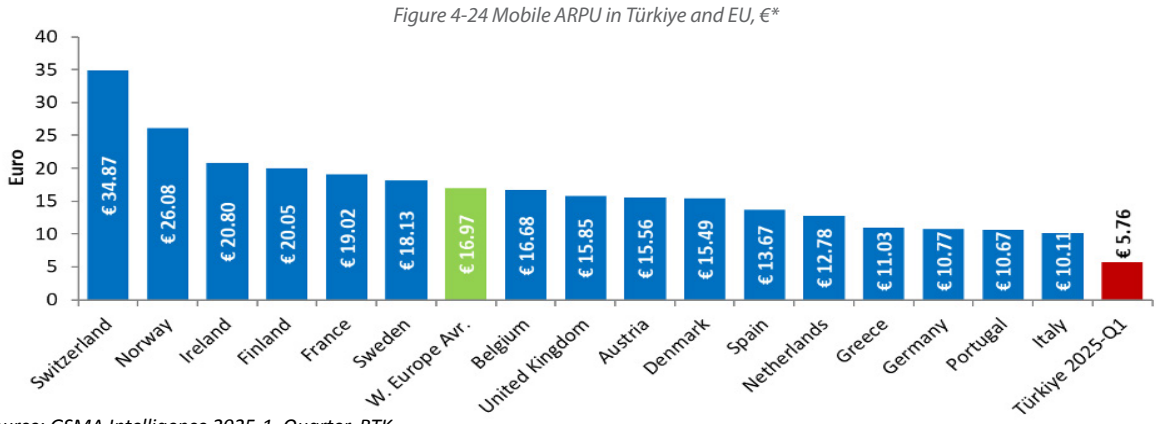


Figure 4-24 compares mobile ARPU figures for some European countries and Türkiye. While the average ARPU in the European countries examined in the figure is 16.97 €, it is 5.76 € in Türkiye for the first quarter of 2025.

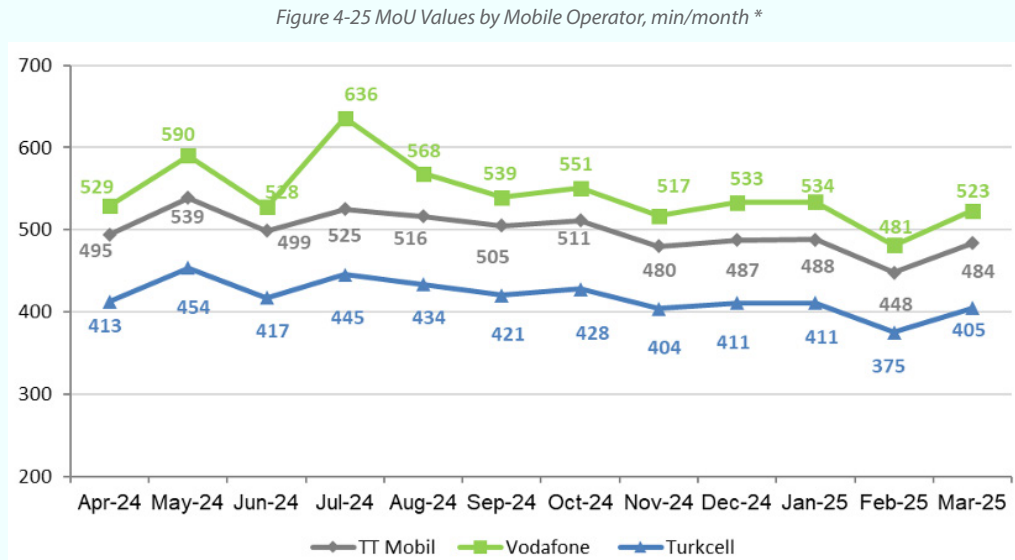


Source: GSMA Intelligence 2025-1. Quarter, BTK.

* Mobile ARPU value for Türkiye is calculated based on the weighted average of the ARPU values of three operators. Euro exchange rate is calculated for each quarter using the average of the daily exchange rates of the Central Bank of the Republic of Türkiye for the relevant months. For 2025-Q1, 1 Euro = ₺44.0789.

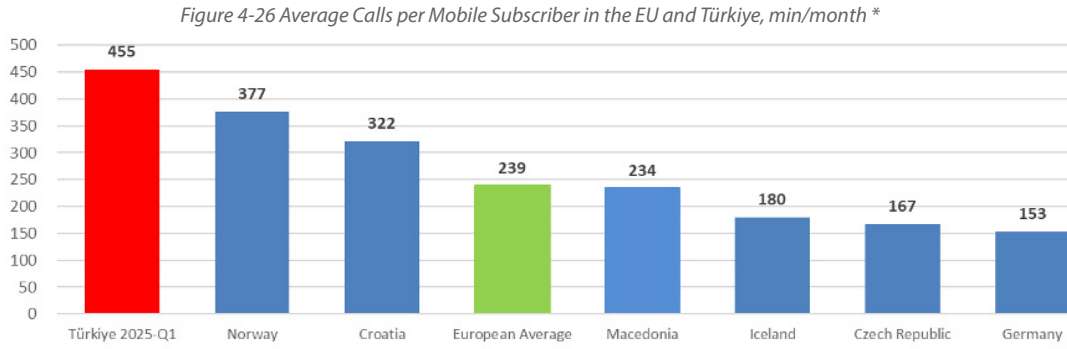
4.7 MINUTES OF USE (MOU)

MoU is a widely used indicator for measuring the level of mobile telephony usage and is defined as the average monthly talk time of a subscriber. Figure 4-25 shows the MoU values of mobile operators on a monthly basis starting from April 2024. As of March 2025, Turkcell's MoU was 405 minutes, Vodafone's MoU was 523 minutes and TT Mobil's MoU was 484 minutes.



* Since MoU values are the average call duration of active users in minutes, the values are calculated by deducting mobile lines that are not open for telephony service (lines used only for data transmission, such as M2M lines and data only lines) from the total number of lines.

Figure 4-26 shows the average MoU in some European countries and Türkiye. In the first quarter of 2025, Türkiye made the highest usage compared to the European countries with an average MoU of 455 minutes.



Source: GSMA Intelligence 2025-1, BTK⁸.

4.8 MOBILE INVESTMENT

Figure 4-27 shows the total annual investment of the three mobile operators between 2018 and 2024. The total mobile investment in 2024 is around ₺50.7 billion.

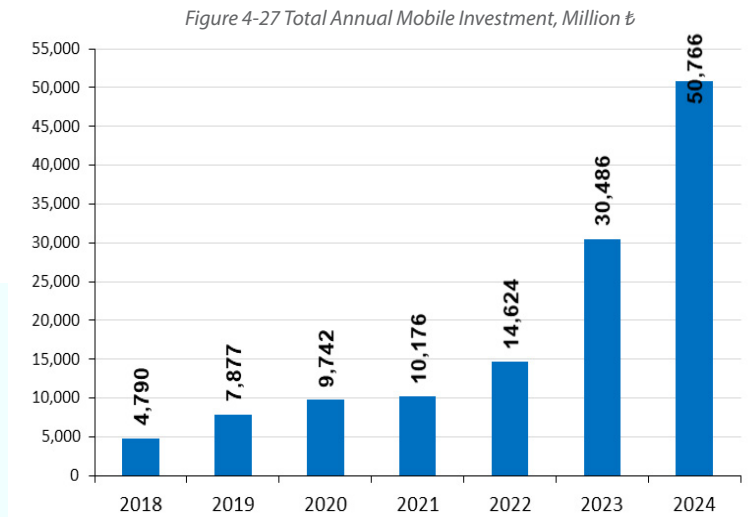
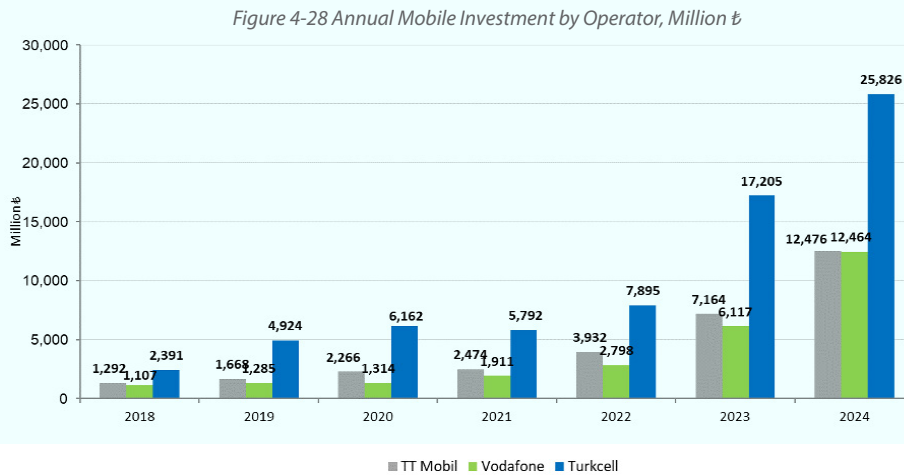
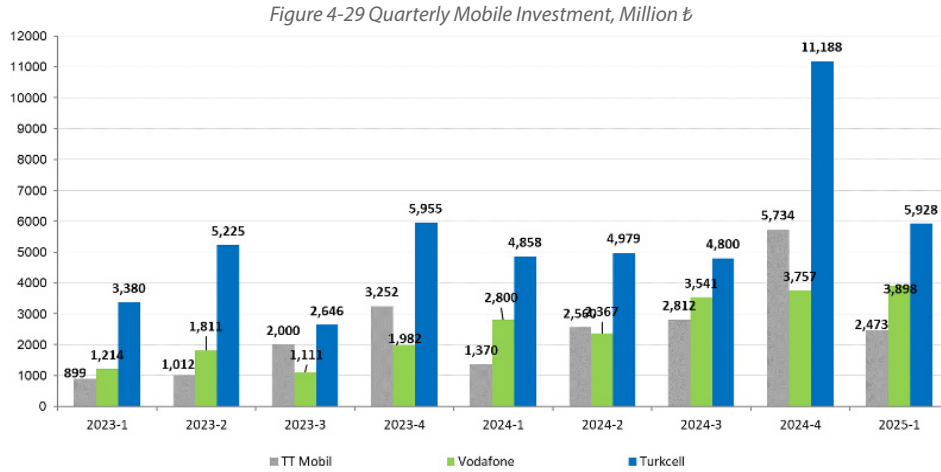


Figure 4-28 shows the annual investments of mobile operators separately. In 2024, Vodafone invested ₺12,464 million, TT Mobil ₺12,476 million and Turkcell ₺25,826 million.



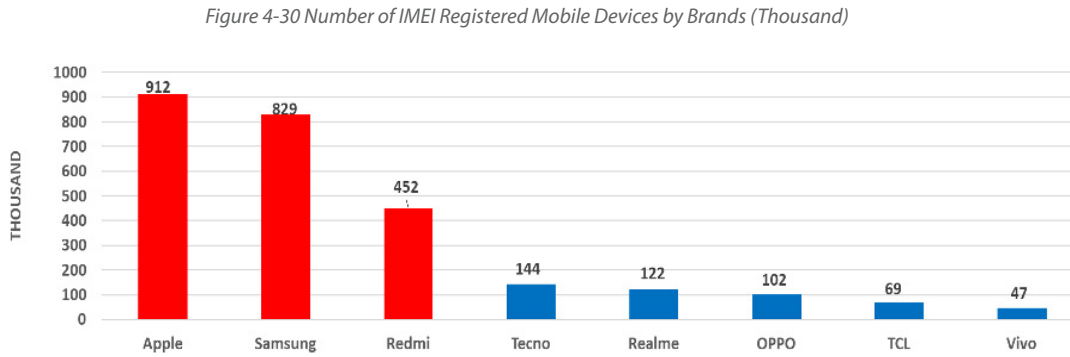
8 Calculated based on the latest MoU values announced by the countries according to GSMA Intelligence data.

Figure 4-29 shows the quarterly investments of mobile operators. Turkcell invested ₺5,928 million, Vodafone ₺3,898 million and TT Mobil ₺2,473 million in the first quarter of 2025.



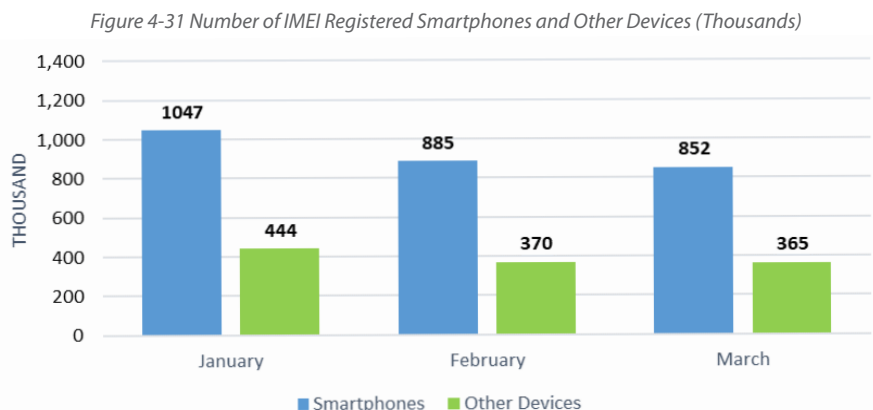
4.9 MOBILE DEVICE REGISTRATION SYSTEM

Figure 4.30 shows the number of devices registered to the Mobile Device Registration System (MDRS) through import and manufacturing in the first quarter of 2025.



In the first quarter of 2025, more than 2.9 million mobile devices were registered, and approximately 73.5 % of these devices were produced by Apple, Samsung and Redmi brands.

Figure 4.31 shows the types of imported and manufactured devices registered. Most of the registered devices are smartphones.





PART 5
OTHER
SERVICES

5 OTHER SERVICES

5.1 INFRASTRUCTURE MANAGEMENT SERVICE

As of the end of March, there are 190 infrastructure operators authorized under notification and 14 authorized under usage rights in Türkiye. Table 5-1 presents the length of fiber optic cables owned by these operators over time. The lengths listed in the table include not only the operators' own infrastructure but also leased backbone and access networks. As of the first quarter of 2025, the total fiber length of the operators is approximately 618,000 km, of which 238,000 km is used for backbone purposes, while the remaining portion is used for access.

Table 5-1 Fiber Lengths of Operators, km

Period	Total Length Owned	Total Leased Length	Total Backbone Length	Total Access Length	Total Overall Length
2022-1	451,824	26,649	214,570	263,903	478,473
2022-2	462,297	26,658	216,586	272,369	488,955
2022-3	471,574	26,823	216,825	281,571	498,397
2022-4	489,111	28,214	221,519	295,806	517,325
2023-1	497,404	28,728	223,147	302,985	526,132
2023-2	507,355	28,652	224,249	311,758	536,007
2023-3	517,371	32,053	225,252	324,172	549,424
2023-4	528,815	32,879	227,804	333,890	561,694
2024-1	533,962	34,073	229,761	338,274	568,035
2024-2	543,552	33,017	230,806	345,762	576,569
2024-3	555,212	32,936	231,913	356,235	588,148
2024-4	571,532	33,086	232,735	371,884	604,618
2025-1	580,195	37,570	238,387	379,378	617,765

Figure 5-1 shows the fiber lengths installed by Türk Telekom and infrastructure operators in each quarter, compared to the previous period.

Figure 5-1 Quarterly Increase in Fiber Lengths of Operators Compared to the Previous Period, km

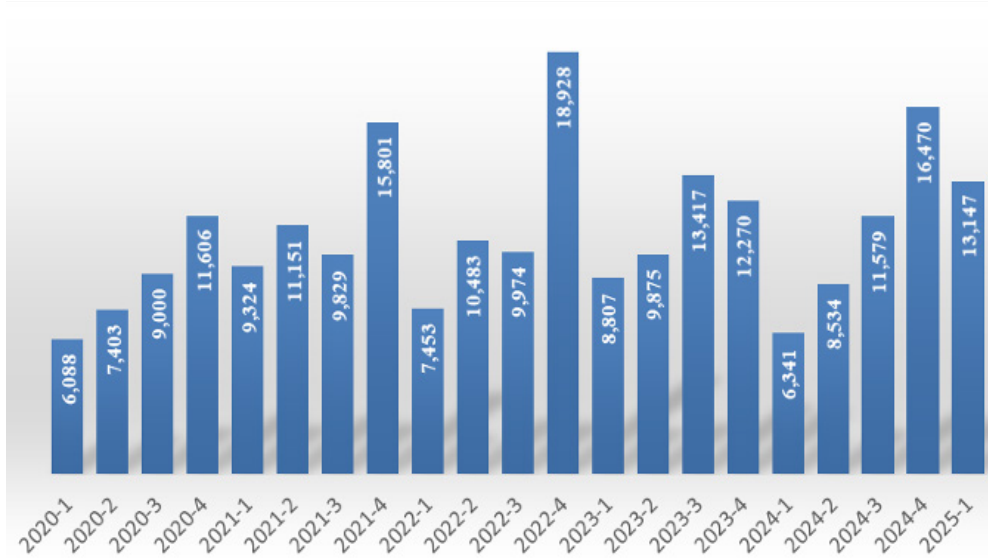


Table 5-2 presents the revenue data for the infrastructure operator group. In the first quarter of 2025, the total revenue generated by operators from infrastructure services amounted to ₺2,974 million.

Table 5-2 Revenues from Alternative Infrastructure Operation Services

Period	Revenue, ₺
2022-2	1,145,135,424
2022-3	1,559,166,340
2022-4	1,895,072,610
2023-1	1,646,130,028
2023-2	1,572,986,622
2023-3	1,819,819,563
2023-4	1,998,890,708
2024-1	2,226,155,196
2024-2	2,264,671,387
2024-3	2,790,207,935
2024-4	2,814,712,300
2025-1	2,974,185,772

5.2 CABLE BROADCASTING SERVICES

As of Q1 2025, a total of 13 operators have been authorized by BTK to provide Cable Broadcasting Services (CBS). Turksat, one of the operators for cable broadcasting services reported a total of 1,502,786 cable TV subscribers as of the first quarter of 2025. Among the other authorized operators providing CBS, TNet and Superonline offer IPTV services only to 1,098,926 and 1,456,302 subscribers respectively (Table 5-3).

Table 5-3 Cable Broadcasting Services

Period	Number of Cable TV Subscribers	Number of IPTV Subscribers
2024-1	1,465,735	2,442,647
2024-2	1,484,788	2,486,500
2024-3	1,499,846	2,503,199
2024-4	1,499,846	2,522,781
2025-1	1,502,786	2,555,271

The trend of the number of cable TV subscriptions is shown in Table 5-3, and the number of cable TV subscribers increased by approximately 0.2% compared to the previous three-month period, reaching 1,502,786.

The trend of the number of IPTV subscribers is shown in Table 5-3, and the number of IPTV subscribers increased by approximately 1.29% compared to the previous three-month period, reaching 2,555,271.

5.3 SATELLITE COMMUNICATION SERVICES

Operators authorized to provide satellite communication services within the scope of the notification provide services to 15,508 subscribers via satellite ground stations as of the first quarter of 2025.

The subscriber and revenue information of the operators providing satellite communication services is given in Table 5-4, and the market shares of the operators in question according to their subscriber numbers are given in Table 5-5. The total revenue related to this service was approximately 1,107 million ₺ for the first quarter of 2025.

Table 5-4 Number of Subscribers and Revenue Related to Satellite Communication Services

Period	Number of Subscribers	Revenue, ₺
2024-1	15,397	773,094,196
2024-2	15,773	903,962,050
2024-3	16,184	945,466,194
2024-4	15,959	1,152,281,266
2025-1	15,508	1,107,037,507

When the market shares of operators providing services in this field are examined according to the number of subscribers, it is seen that Eser Telekom has a market share of 42.1%, followed by Türksat with 37.1%, Superonline with 8.6%, ICT Telekom with 5.6% and İşNet with 5.3%, respectively

Table 5-5 Market Shares of Satellite Communication Service Operators According to the Number of Subscribers, %

Operator	2024-1	2024-2	2024-3	2024-4	2025-1
Eser Telekom	43.3	43.1	43.8	43.5	42.1
Türksat	37.4	36.9	36.3	36.5	37.1
Superonline	8.5	8.4	8.3	8.3	8.6
ICT Telekom	4.3	5.4	5.4	5.4	5.6
İşNet	4.9	4.8	5.0	5.1	5.3
Others	1.6	1.4	1.2	1.2	1.3

5.4 SATELLITE PLATFORM SERVICES

Of the operators authorized to provide satellite platform services, Digital Platform, Andromeda TV and TNet are actively operating. The user numbers of these operators are shown in Table 5-6. In addition, the total of monthly periodic revenues obtained within the scope of satellite platform services and revenues obtained from transactions such as connection/installation, line establishment, cancellation, transfer, etc. are given in Table 5-7.

Table 5-6 Number of Users of Satellite Platform Service

		2024-1	2024-2	2024-3	2024-4	2025-1
DİĞİTAL PLATFORM	Number of Users	2,664,737	2,648,616	2,757,806	2,742,222	2,727,996
ANDROMEDA TV	Number of Users	943,035	915,424	882,903	845,698	816,577
TTNET AŞ	Number of Users	490,269	463,800	466,156	458,249	443,521

* The "Number of users" in the table refers to the total number of subscriber agreements signed domestically and the number of users specified in the subscription agreements and the number of users invoiced separately for these specified users.

Table 5-7 Satellite Platform Service Revenues, ₺

	2024-1	2024-2	2024-3	2024-4	2025-1
Total Revenues	155,549,570	150,629,946	221,665,121	216,349,761	256,757,741

5.5 GLOBAL MOBILE PERSONAL COMMUNICATIONS BY SATELLITE (GMPCS) SERVICES

As of the first quarter of 2025, 6 of the 8 authorized operators actively provide GMPCS services. The quarterly revenue and subscriber information for this service is provided in Table 5-8. As of the first quarter of 2025, the total number of subscribers in this service group is 6,027. The revenue for GMPCS services was approximately 42 million ₺ during this period.

Table 5-8 Number of Subscribers and Revenues for GMPCS Service

Period	Number of Subscribers	Revenue, ₺
2024-1	5,641	32,864,489
2024-2	5,809	33,937,981
2024-3	5,771	32,994,293
2024-4	5,979	49,949,835
2025-1	6,027	41,870,932

When we look at the market shares of operators operating in this field according to the number of subscribers; Teknomobil's market share 45.2%, Icom's market share 22.7%, Aselnet's market share 22.7% and ClickNet's market share is 6.0% (Table 5-9).

Table 5-9 Market Shares of GMPCS Operators, %

Operator	2024-1	2024-2	2024-3	2024-4	2025-1
Teknomobil	53.6	52.2	51.5	47.4	45.2
Icom	20.8	22.2	22.1	21.6	22.7
Aselnet	16.1	16.4	16.8	21.7	22.7
ClickNet	6.0	5.9	6.1	6.1	6.0
Others	3.5	3.3	3.5	3.2	3.4

5.6 DIRECTORY ASSISTANCE SERVICES

As of Q1 2025 seven operators authorized to provide directory assistance services are actively operating. In the first quarter of 2025 the total number of calls made by these operators was 242,588 and the total call duration was 387,390 minutes. The quarterly revenue of directory assistance providers was approximately 25.7 million ₺ (Table 5-10).

Table 5-10 Directory Assistance Services

Period	Number of Calls	Call Duration (Minutes)	Revenue (₺)
2024-1	284,531	627,563	15,906,109
2024-2	309,694	590,670	19,446,742
2024-3	335,049	586,951	25,347,493
2024-4	277,751	453,254	27,904,488
2025-1	242,588	387,390	25,725,577

Table 5-11 presents the market shares of directory assistance operators based on call volume as well as their average call durations. BN Telekom ranks first in directory assistance services, holding a market share of 94.60% based on call numbers.

Table 5-11 Market Shares of Directory Assistance Operators

Operators	%	Average Call Duration (minutes)
BN Telekom (11880 - 11888)	94.60	1.6
Callturk (11858)	2.60	5.1
118 Telekomünikasyon (11834)	0.98	0.7
Mobilışim İletişim (11877)	0.91	0.7
Pluss Telekom (11899)	0.84	0.8

5.7 PUBLIC ACCESS MOBILE RADIO (PAMR) SERVICES

As of the first quarter of 2025, the number of operators authorized to provide Public Access Mobile Radio (PAMR) Services within the scope of the right of use is 37. The number of subscribers, users and income information of PAMR operators are given in Table 5-12, the total number of subscribers is 2,558, the number of users is 125,636 and the income obtained from these services is 90.3 million ₺.

Table 5-12 Number of Subscribers, Users and Revenues of PAMR Services

Period	Number of Subscribers	Number of Users	Revenue, (₺)
2024-1	2,852	127,241	56,641,148
2024-2	2,834	125,785	59,449,245
2024-3	2,849	126,684	66,208,761
2024-4	2,840	128,626	92,748,150
2025-1	2,558	125,636	90,313,447