TÜRKİYE ELECTRONIC COMMUNICATION SECTOR

Quarterly Market Data Report

INFORMATION AND COMMUNICATION TECHNOLOGIES AUTHORITY

2025 3rd QUARTER

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PREFACE

We have successfully completed the frequency allocation tender for 5G, marking a significant milestone in the development of our country's mobile broadband infrastructure. With 5G, which we plan to launch commercially as of April 1, 2026, not only will we provide faster mobile internet, but we will also offer advanced information technologies that will accelerate innovation across many corporate sectors—from healthcare to manufacturing, and from education to finance. In today's world, where the speed of accessing data is becoming as important as producing it, our operators have already begun investing rapidly in 5G infrastructure to ensure that high-speed mobile internet can be used in every corner of our country. I wish for this major step to bring prosperity and benefit to our nation.

This report, which includes data from the electronic communications sector in the third quarter of 2025, is summarized as follows:

- The total net sales revenues of the operators in the sector were approximately ₺171.2 billion in the third quarter of 2025.
- During this period, the number of fixed telephony subscribers was 8.5 million and the number of mobile subscribers was approximately 99.1 million. While the mobile penetration rate was 115.7%, when we exclude the number of machine-to-machine communication (M2M) subscribers and the population aged 0-9, the mobile penetration rate is 118.2%. In the third 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 494 minutes. During this period, approximately 4.9 million mobile subscribers ported their numbers, and the total number of mobile numbers ported until September 30, 2025 was approximately 203 million.

- When broadband data is examined, a total of 98.2 million broadband internet subscribers have been reached, 20.9 million of which are fixed subscribers and 77.3 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 "Fiber to the Home" subscribers with a rate of 26.3%, followed by the number of "Wireless Internet (Fixed)" subscribers with a rate of 26.1%. The average monthly data usage of fixed broadband subscribers in this quarter was 305.3 GBytes.
- The number of subscribers to the 4.5G service, which started to be used in our country on April 1, 2016, was approximately 91.1 million by the end of September 2025. However, due to the fact that the devices or SIM cards of some of subscribers are not compatible with the 4.5G service, the number of those who can actively use this service was approximately 77.7 million. The average monthly usage of mobile broadband internet subscribers was 19.9 GBytes.
- Length of fiber infrastructure, which was approximately 588 thousand km in the same period of the previous year, is approximately 657 thousand km in the third quarter of 2025, an increase of 11.7%.

I present this Report, which includes developments and sectoral data in our electronic communications sector, to the public.

Kind Regards

Ömer Abdullah KARAGÖZOĞLU
Chairman of the Board

BİLGİ TEKNOLOJİLERİ VE İLETİŞİM KURUMU

EXECUTIVE SUMMARY 2025–3. KEY FINDINGS

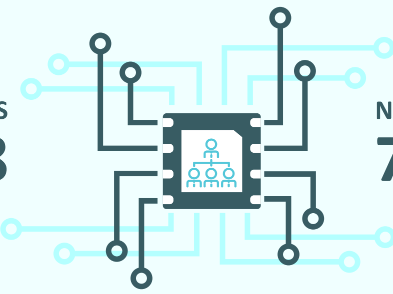
The developments in the Turkish electronic communications market as of the end of the third quarter (July-August-September) of 2025 are summarized below. [1]

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 Q3 of 2025, the number of operators in the electronic communications sector was **408** and the number of authorizations granted to these operators was **757**

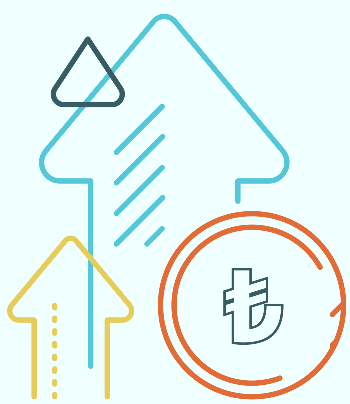
NUMBER OF OPERATORS
408



NUMBER OF AUTHORIZATIONS
757

In Q3 of 2025, the total net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were **₺133 billio**n, while the total net sales revenues of other operators

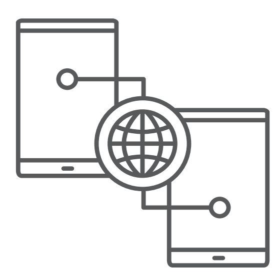
in the same period were approximately **₺38.2 billion.**



In Q3 of 2025, the total investment amount of TT Mobil, Turkcell, Türk Telekom and Vodafone was **₺30.8 billion**,

while other operators invested approximately **₺6.5 billion** in the same period.

In Q3 of 2025, the total amount of mobile traffic was 81.3 billion minutes, while the amount of fixed traffic was approximately **1.2 billion minutes**. Compared to the previous quarter, the amount of mobile traffic increased by 1.2% and the amount of fixed traffic decreased by **12.2%**. The majority of the traffic (95.7%) was mobile to mobile.



In Q3 of 2025, a total of **82,073** complaints were received by BTK from consumers, and approximately **46.3%** 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 about internet service providers, satellite platform services and cable TV.

Fixed Market

In Q3 2025, Türkiye had approximately **8.47 million** fixed-line subscribers, corresponding to a penetration rate of around 10%.Turk Telekom's fixed telephony revenues amounted to approximately **₺3.110 billion** in Q3 2025, marking an increase of 36.2% compared to the same period of the previous year and a 20% increase compared to the preceding quarter.

Approximately **5.7 million** subscribers received fixed-line services from alternative operators, with these operators generating revenues of about **₺2.05 billion** from all fixed telephony services in Q3 2025.

In local call traffic, alternative fixed-line operators held a **24.1%** share, while Türk Telekom accounted for **75.9%.**

For long-distance call traffic, alternative fixed-line operators had a market share of **88.6%,** while Türk Telekom's share was **11.4%.**

In call traffic directed to mobile networks, alternative fixed-line operators accounted for **66.6%**, and Türk Telekom held **33.4%**.

For outbound international call traffic, Türk Telekom's ma rket share was **45.8%**, whereas fixed-line operators' share was **54.2%**.

In international call traffic terminated on fixed networks, Türk Telekom's share was **18.9%**, with fixed-line operators holding **81.1%**.

In international call traffic terminated on mobile networks, fixed-line operators' share was **84.2%**, while Türk Telekom's share was **15.8%**.

Broadband Market

- Broadband internet subscribers, which were around 6 million in 2008, exceeded 98 million as of the third quarter of 2025.
- In the third quarter of 2025, total internet subscriptions increased by 0.9% compared to the previous three-month period and increased by 1.9% annually.
- In the third quarter of 2025, the number of xDSL subscribers was approximately 9.2 million, while the number of fiber subscribers reached 9.29 million.
- The number of cable internet subscribers remained unchanged from the previous three-month period at 1.5 million.
- In the third quarter of 2025, the total revenue of internet service providers reached ₺28.8 billion.
- In the third quarter of 2025, the average monthly usage of fixed broadband internet subscribers was 305.3 GBytes, while the average monthly usage of mobile broadband internet subscribers was 19.9 GBytes.

Mobile Market

- As of the end of September 2025, there are a total of 99,129,226 mobile subscribers in Türkiye, including machine-to-machine (M2M) subscribers, corresponding to a penetration rate of approximately 115.7%. Excluding machine-to-machine (M2M) and the 0-9 age group, the mobile penetration rate was 118.2%. [2]
- In the third quarter of 2025, the number of 3G subscribers was 5,887,769, while the number of 4.5G subscribers reached 91,099,845. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones with 3G and 4.5G services was 77,331,794. The total amount of mobile internet usage in the third quarter of 2025 was 4,508,636 TBytes.
- As of the third quarter of 2025, the number of M2M subscribers was approximately 11.4 million.
- As of the third quarter of 2025, the number of prepaid mobile broadband subscribers was 12,896,491 and the number of postpaid mobile broadband subscribers was 62,986,645.
- In the third three months of 2025, the number of mobile number portability decreased by 1.3% compared to the previous three-month period and was 4,896,014. A total of 202,885,752 number portability transactions were carried out until September 30, 2025.
- As of the third quarter of 2025, Turkcell holds a market share of 39.4%, Vodafone 29.6% and TT Mobil 31.1% in terms of subscriber numbers.
- Approximately 80% of total mobile subscribers are individual subscribers and 20% are corporate subscribers.
- Total mobile traffic volume in the third quarter of 2025 was 81.3 billion minutes. When traffic information for the third quarter of 2025 is compared to the previous three-month period, it is seen that total mobile traffic increased by 1% and decreased by 2.3% compared to the same period of last year.
- When examined on an operator basis, it is seen that Turkcell's traffic volume increased by 2.4%, TT Mobil's traffic volume increased by 2%, while Vodafone's traffic volume decreased by 1.2% compared to the previous period.
- In the third quarter of 2025, it is seen that the total number of SMS was approximately 6,022 million and the number of MMS was approximately 12.7 million.

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

- When market shares by revenue are examined as of the third quarter of 2025, it is seen that Turkcell's market share is 43%, Vodafone's market share is 33.9% and TT Mobil's market share is 23.1%.
- When market shares by revenue are compared with the previous period in the third quarter of 2025, it is seen that TT Mobil's market share decreased by 1.3 points, Vodafone's market share decreased by 1.2 points and Turkcell's market share increased by 2.4 points.
- According to the revenue obtained from subscribers as of the third quarter of 2025, Turkcell's market share is 42.5%, while Vodafone and TT Mobil's market shares are 30.9% and 26.6%, respectively.
- Call revenues constitute 6.1% of TT Mobil's revenues, 8.4% of Vodafone's revenues, and 6.8% of Turkcell's revenues. SMS and MMS revenues constitute 24.5% of TT Mobil's revenues, 5.3% of Vodafone's revenues, and 1.9% of Turkcell's revenues. Data revenues have a share of 66.4% in TT Mobil, 85.4% in Vodafone, and 90.3% in Turkcell.
- As of the third quarter of 2025, the monthly revenue per subscriber is ₺327.4 for Turkcell, ₺316.4 for Vodafone, and ₺259.2 for TT Mobil.
- As of September 2025, Turkcell's MoU value is 431 minutes, Vodafone's is 541 minutes, and TT Mobil's is 504 minutes.
- Türkiye has become the country that makes the most calls on mobile phones compared to the European countries in the third quarter of 2025, with an average monthly mobile usage time of 494 minutes.

Other Services

As of the third quarter of 2025, the total fiber length of operators amounts to 657 thousand km. Of this total, 245 thousand km is backbone infrastructure, while the remaining portion is used for access purposes. The total revenue generated by alternative infrastructure operators in the third quarter of 2025 is approximately ₺2,974 million.

As of the third quarter of 2025, the total number of subscribers to GMPCS Services was 6,299 and the revenue generated from GMPCS services was ₺41,3 million.

Within the scope of directory services, the total number of calls in Q3 2025 was 238,721, with a cumulative call duration of 398,051 minutes. The quarterly revenue generated by directory service providers amounted to approximately 31.4 million TRY.

In Q3 2025, Turksat's total cable TV subscriber number reached to 1,535,742. The number of IPTV service subscribers offered by TTNet and Superonline are 1,158,278 and 1,425,202 respectively.

During this period, the total number of subscribers of operators offering Public Access Mobile Radio (PAMR) Services was 2,740 and the number of users was 126,064. The revenue from these services in the third quarter of 2025 was approximately ₺76.1 million

As of the end of the third quarter of 2025, operators authorized to provide Satellite Communication Services served 16,425 subscribers and the total revenue generated from this service during the same period was approximately ₺2,125 million.

The total number of users of Satellite Platform Services reached approximately 4,1 million as of the third quarter of 2025. The total revenue from this service was approximately ₺263,6 million.

ABBREVIATIONS

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

NAME OF OPERATOR	ABBREVIATION
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
CALLTÜRK TELEKOMÜNİKASYON HİZMETLERİ AŞ	Callturk
CLİCKNET TELEKOMÜNİKASYON UYDU TEKNOLOJİLERİ AŞ	Clicknet
DİGİTAL PLATFORM TEKNOLOJİ HİZMETLERİ AŞ	Digital Platform
ESER TELEKOMÜNİKASYON SAN. VE TİC. AŞ	Eser Telekom
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
MOBİLİŞİM İLETİŞİM ANONİM ŞİRKETİ	Mobilişim
NETGSM İLETİŞİM VE BİLGİ TEKNOLOJİLERİ AŞ	Netgsm
PLUSS TELEKOM İLETİŞİM TİCARET AŞ	Pluss Telekom
SOCAR TURKEY FİBER OPTİK AŞ	Socar
SUPERONLİNE 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
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 third quarter (July-August-September) of 2025 are analyzed in comparison with the previous periods.

1.1 NUMBER OF OPERATORS ACCORDING TO AUTHORIZATION AND SERVICE TYPES

As of September 30, 2025, the number of operators operating in the electronic communications sector is 408 and the number of authorizations granted to these operators is 757. Table 1-1 shows the number of authorizations according to service types.

Table 1-1 Number of Authorizations by Service Types

Authorization Type	Services	Number of Authorizations
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	6
	Infrastructure Operation Service	192
	Internet Service Providers	308
	Cable TV Service	12
	GMPCS	6
	GSM 1800 Mobile Phone Service on Aviation	2
	Mobile Virtual Network Operator Service	18
Service Providers under Right of Use	IMT Service	3
	GMPCS Mobile Telephony Service	2
	PMR/PAMR Service	36
	Infrastructure Operating Service	14
	Fixed Telephone Service	99
	Directory Assistance Services	7
	Mobile Virtual Network Operator Service	20
TOTAL		**757**

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 Q3 of 2025, the net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were ₺133 billion in total.

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

	2024-3	2024-4	2025-1	2025-2	2025-3
TT Mobil	16,035,104,160	17,666,619,463	19,617,594,952	21,731,261,829	24,008,555,542
Turkcell	30,784,643,689	33,131,210,086	31,615,962,867	36,172,030,772	44,788,503,904
Türk Telekom	18,266,007,494	20,624,223,755	18,786,324,477	20,547,462,220	28,956,507,865
Vodafone	24,619,662,226	26,417,036,471	27,929,285,806	31,290,715,358	35,261,977,865
TOTAL	89,705,417,570	97,839,089,775	97,949,168,103	109,741,470,179	133,015,545,176

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 approximately ₺38,2 billion in Q3 of 2025.

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

Authorization Type	2024-3	2024-4	2025-1	2025-2	2025-3
ISP	17,089,823,374	19,327,143,211	21,151,569,648	23,616,740,231	28,774,264,523
FTS	2,284,538,671	2,485,594,391	2,756,082,957	2,329,416,004	2,051,423,651
Infrastructure	2,790,207,935	2,814,712,300	2,974,185,772	3,358,176,363	3,689,491,608
Satellite Communications	945,466,194	1,152,281,266	1,107,037,507	1,217,023,111	2,124,982,805
Directory Assistance	25,347,493	27,904,488	25,725,577	29,149,239	31,353,394
Cable TV	950,613,387	1,072,651,442	1,162,766,466	1,274,842,825	1,366,559,233
GMPCS	32,994,293	49,949,835	41,870,932	53,312,005	41,316,139
PMR/PAMR	66,208,761	92,748,150	90,313,447	76,099,234	76,108,805
TOTAL	24,185,200,108	27,022,985,083	29,309,552,306	31,954,759,012	38,155,500,158

** 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

** İlt 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 Q3 of 2025, total investment of TT Mobil, Turkcell, Türk Telekom and Vodafone was around ₺30.8 billion.

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

	2024-3	2024-4	2025-1	2025-2	2025-3
TT Mobil	2,812,307,856	5,733,655,419	2,473,416,889	4,886,065,477	8,981,865,084
Turkcell	4,799,786,002	11,188,434,972	5,927,917,794	9,120,809,836	7,757,437,610
Türk Telekom	4,613,296,297	9,259,225,120	3,435,090,401	6,272,493,870	10,392,666,182
Vodafone	3,540,553,080	3,757,313,645	3,898,411,338	2,920,990,273	3,681,160,806
TOTAL	**15,765,943,235**	**29,938,629,157**	**15,734,836,422**	**23,200,359,455**	**30,813,129,682**

*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, approximately ₺6.5 billion was invested by other operators in Q3 of 2025.

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

	2024-3	2024-4	2025-1	2025-2	2025-3
Other Operators	6,168,384,296	14,142,106,278	3,042,033,573	6,556,399,940	6,456,392,045

* *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

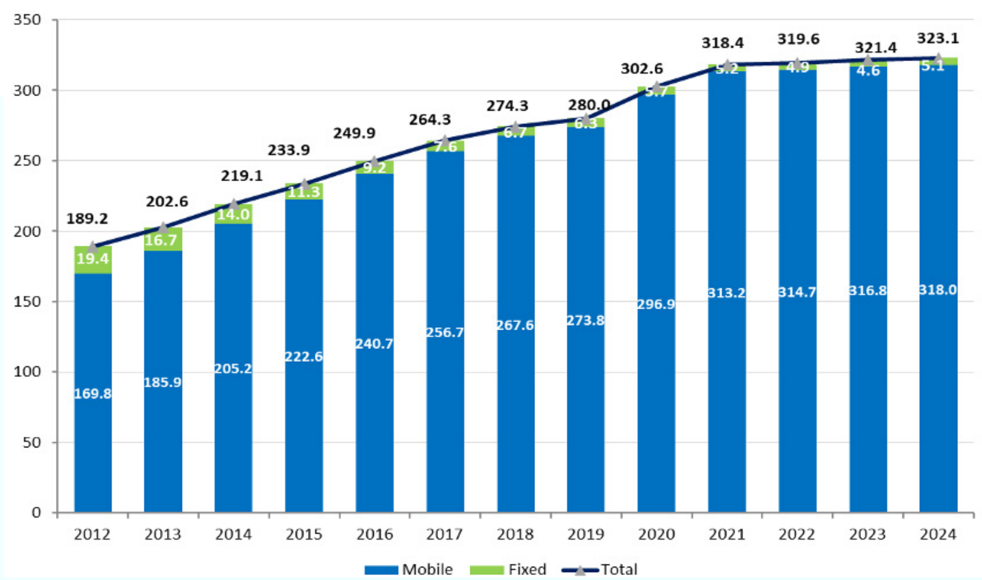
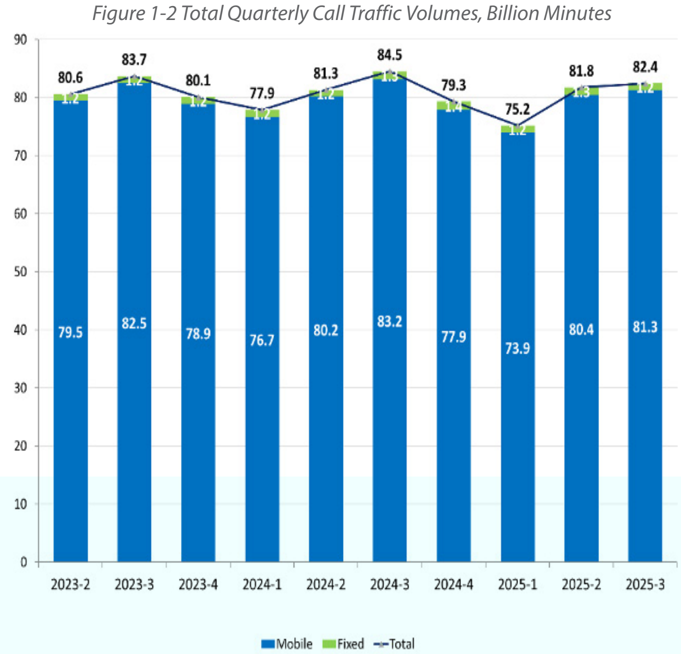


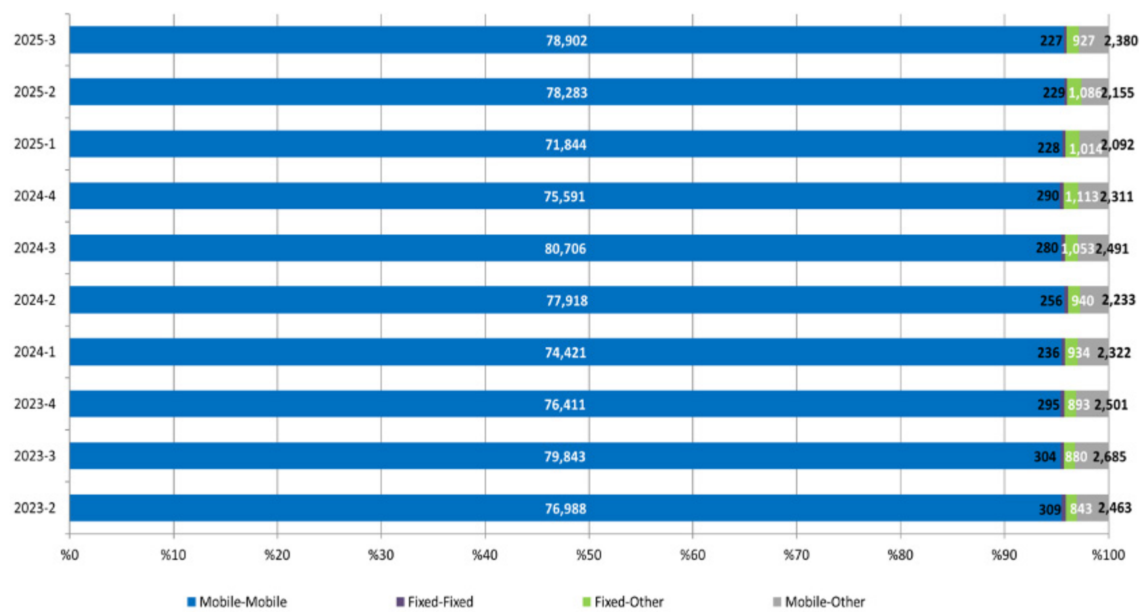
Figure 1-2 shows the total fixed and mobile traffic in Türkiye on a quarterly basis starting from the Q2 of 2023. In Q3 of 2025, the total mobile traffic was approximately 81.3 billion minutes, while the fixed traffic was 1.2 billion minutes.

Figure 1-2 Total Quarterly Call Traffic Volumes, Billion Minutes



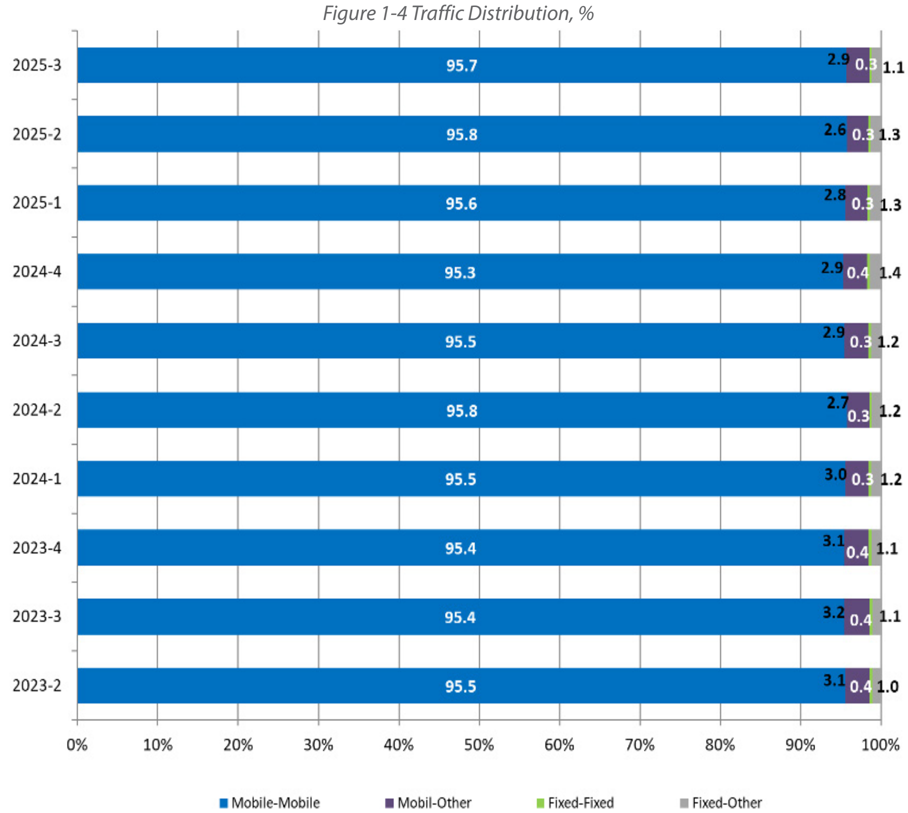
The distribution of traffic generated by fixed and mobile operators in the Turkish electronic communications sector by direction is compared in quarterly as follows.

Figure 1-3 Traffic Distribution, Billion Minutes



In the third quarter of the year, the majority of the total traffic (95.7%) 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).

Figure 1-4 Traffic Distribution, %



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 Q3 of 2025, 82,073 complaints were submitted to the BTK.

Table 1-10 Quarterly Number of Consumer Complaints by Sector

	2024-1	2024-2	2024-3	2024-4	2025-1	2025-2	2025-3
Mobile	17,348	16,648	20,960	21,064	19,087	30,153	35,999
ISP	20,444	18,481	25,116	25,065	22,007	22,700	38,005
Satellite Platform	2,118	2,536	3,454	2,521	1,947	1,752	4,209
Fixed Telephone	1,441	1,489	2,010	1,982	1,798	2,565	3,205
Cable TV	371	385	291	433	422	372	655
TOTAL	**45,129**	**41,826**	**39,445**	**51,973**	**51,054**	**45,211**	**82,073**

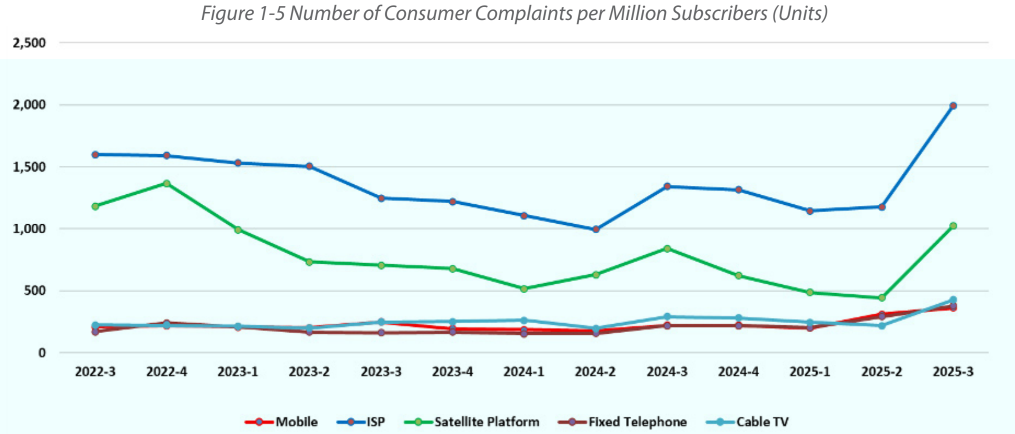
The percentage distribution of the most common complaint topics among the complaints received by services is given in the table below.

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	Commitment/PenaltyClause/Early Termination Fee → %23.41
Internet Service Provider Service	Connection/Service Quality → %41.8
Satellite Platform Service	Billing → %23.45
Fixed Telephone Service	Subscription Transactions → %42.22
Cable TV Service	Connection/Service Quality → %35.73

Figure 1-5 shows the number of consumer complaints per million subscribers on a service basis. As of the Q3 2025, an average number of consumer complaints per million subscribers was 1,992 for ISPs, 1.022 for satellite platform service providers, 427 for Cable TV service providers, 378 for fixed telephony service providers and 363 for mobile operators.

Figure 1-5 Number of Consumer Complaints per Million Subscribers (Units)



PART 2

FIXED TELEPHONY MARKET DATA

2. FIXED TELEPHONY MARKET DATA

In Q3 2025, Türkiye had 8.469.554 fixed telephony subscribers with a penetration rate of approximately 10% (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.

Figure 2-1 Number of Fixed Telephony Subscribers and Penetration Rate

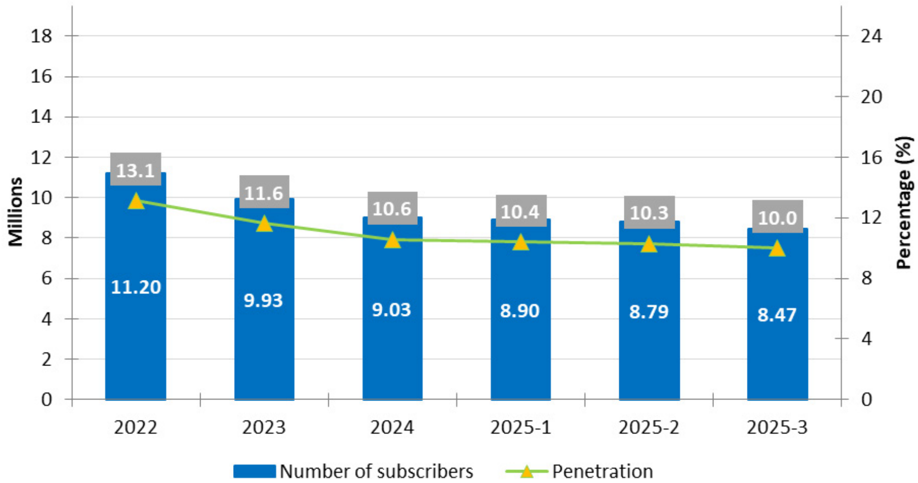


Table 2-1 presents the market shares of alternative fixed telephony operators in terms of subscriber numbers. According to the data, the top three operators are TTNet, Turksat, and NetGSM.

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

Operator	Market Share (%)
TTNet	74.2
Turksat	4.1
NetGsm	3.0
Voip Telekom	2.8
Is Net	2.7
Superonline	1.7
Turk Net	1.6
Kobikom	1.3
Others	8.5

In Q3 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 Q3 2025 were Superonline, TTNet and Eser Telekom respectively.

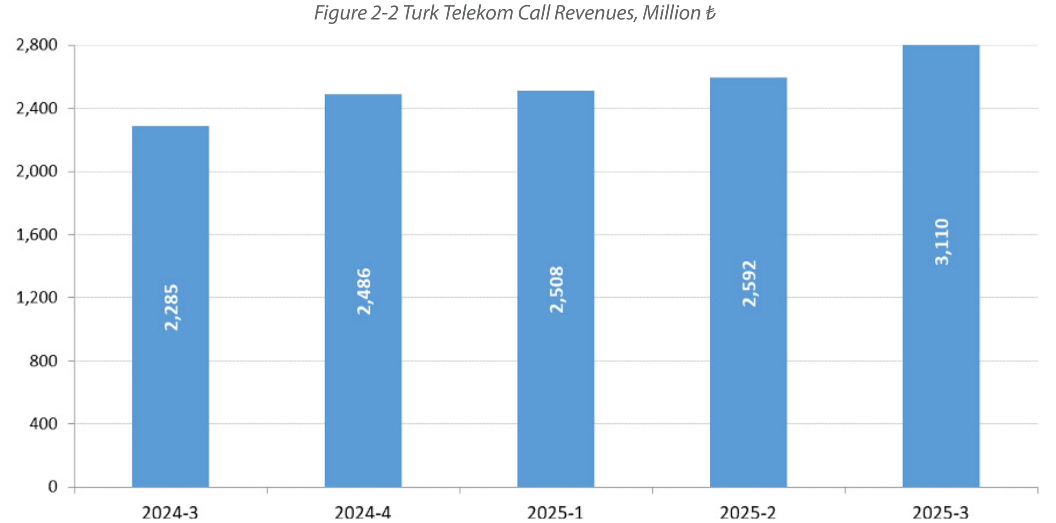
Table 2 -2 Market Shares of Alternative Fixed Telephony Operators by Net Sales Revenue

Operator	Market Share (%)
Superonline	54.4
TTNet	16.7
Eser Telekom	2.8
NetGsm İletisim	2.3
Posta Guvercini	2.2
Mikrotel	2
İş Net	1.7
Efecel Bilisim	1.3
Others	9

2.1 CALL REVENUES FROM FIXED VOICES

In Q3 2025, Turk Telekom's fixed telephony revenues reached approximately ₺3,110 billion, representing an increase of 36.2% compared to the same period of the previous year, and a 20% increase compared to the previous quarter (Figure 2-2).

Figure 2-2 Turk Telekom Call Revenues, Million ₺



Calculated based on gross sales.

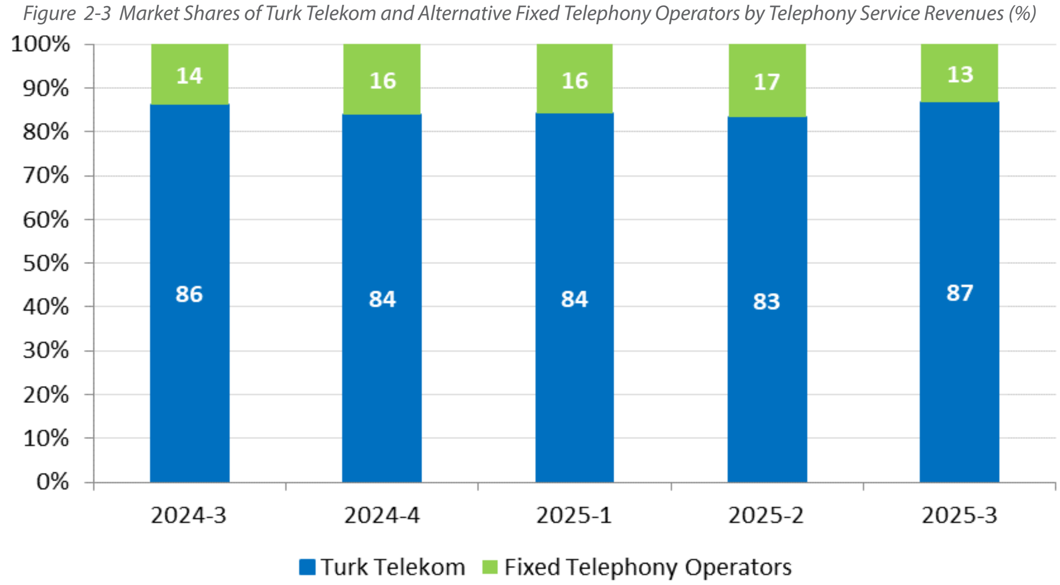
Table 2-3 presents the total net sales revenues of alternative fixed telephony operators starting from Q3 2024. Approximately 5.7 million subscribers received fixed telephony services from alternative operators. For Q3 2025, the total revenue generated by these operators from all fixed telephony services amounted to approximately ₺2,05 billion.

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

Quarter	Net Sales Revenue (₺)
2024-3	2,284,538,671
2024-4	2,485,594,391
2025-1	2,756,082,957
2025-2	2,329,416,004
2025-3	2,051,423,651

Figure 2-3 illustrates the market shares of alternative fixed telephony operators and Turk Telekom based on their revenues from telephone services. In Q3 2025 the market shares of alternative fixed telephony operators and Turk Telekom were 13% and 87%, respectively.

Figure 2-3 Market Shares of Turk Telekom and Alternative Fixed Telephony Operators by Telephony 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 26.4% of this traffic in the previous quarter, their share inclined to 30.5% in Q3 2025.

Figure 2-4 Comparison of Call Origination (Local) Traffic (%)

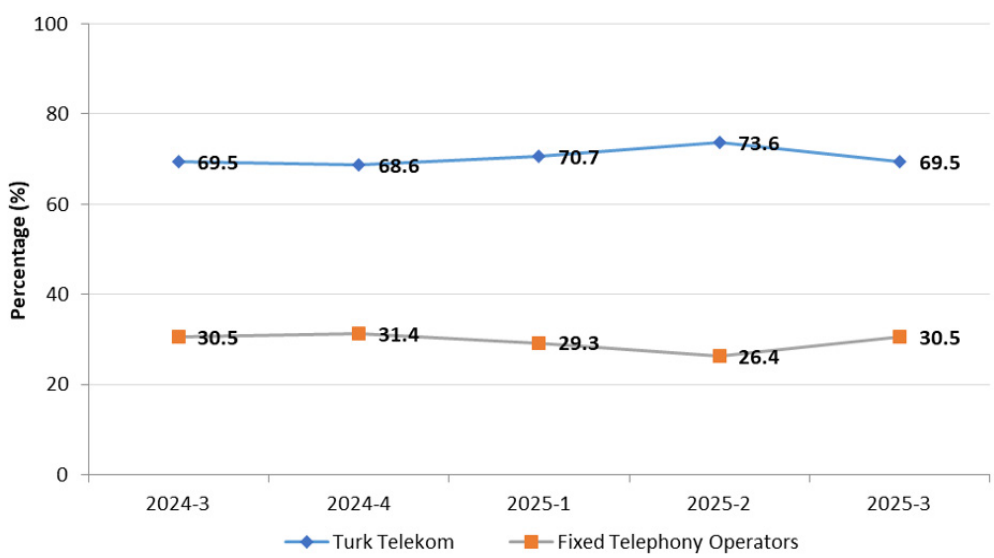


Figure 2-5 compares the shares of alternative fixed telephony operators and Turk Telekom in long-distance traffic starting from the Q3 2024. Accordingly, in Q3 2025, operators held a market share of 88.6% in long-distance traffic, while Turk Telekom's share was 11.4%.

Figure 2-5 Comparison of Call Origination Traffic (Long-Distance, %)

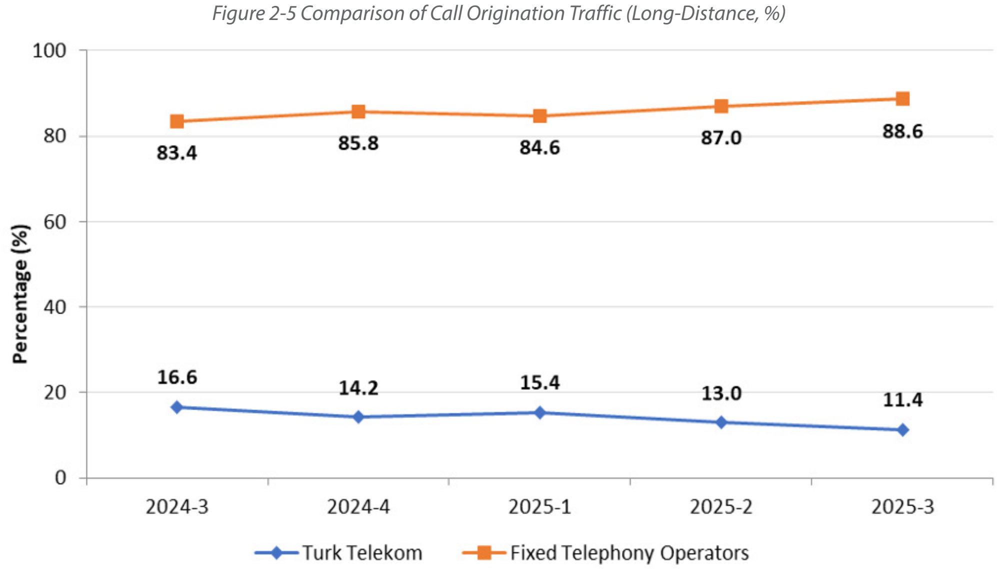
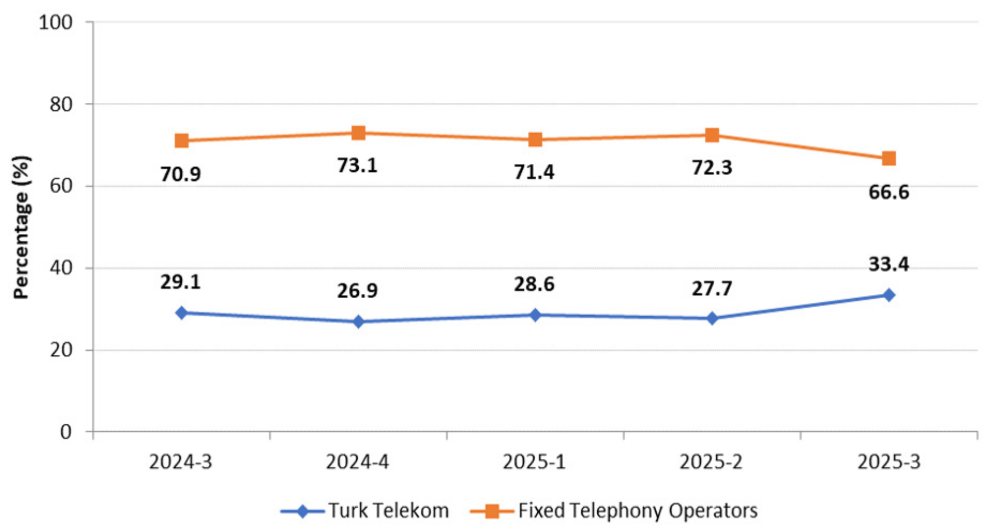


Figure 2-6 compares the market shares of alternative fixed telephony operators and Turk Telekom in call traffic directed to mobile networks. While fixed telephony operators held a market share of 70.9% in Q3 2024, their share decreased to 66.6% in Q3 2025. Turk Telekom's market share for the same period was 33.4%.

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 54.2% and the market share of fixed telephony operators 45.8%.

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

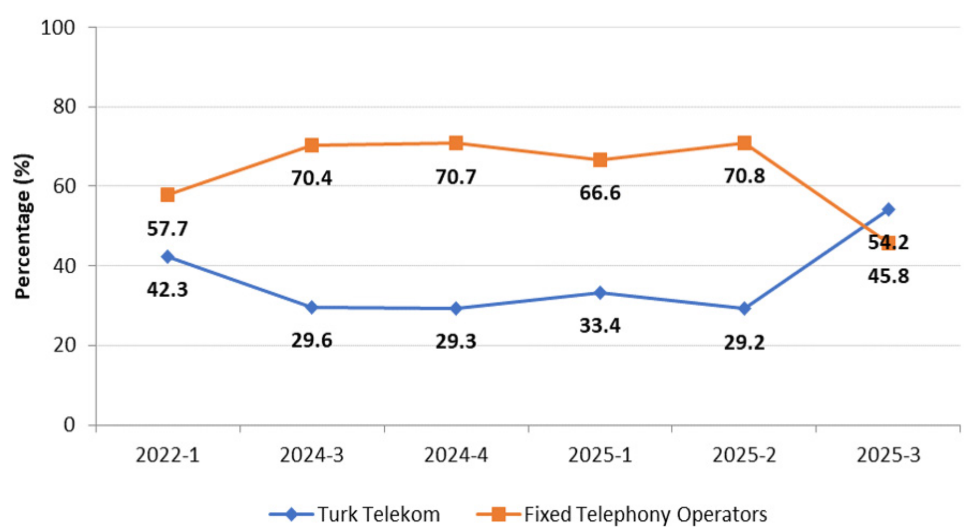


Figure 2-8 shows the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on the fixed network. Compared to the same period in 2024, Türk Telekom's share remained unchanged at 18.9% in Q3 2025, while the share of fixed telephone operators also remained unchanged at 81.1%.

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

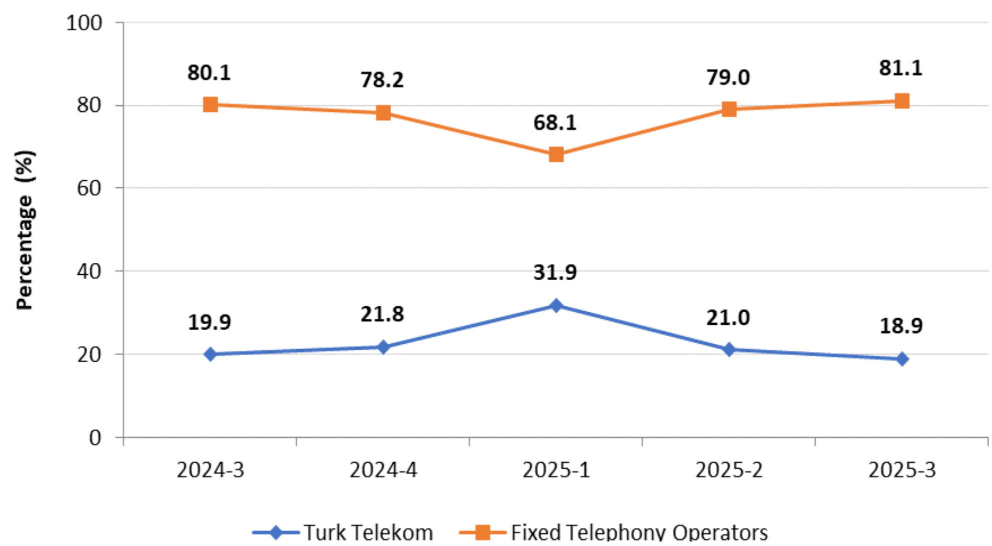


Figure 2-9 compares the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on mobile networks. In Q3 2024, alternative fixed telephony operators held a market share of 84.6% in this segment, which declined to 84.2% in Q3 2025. Meanwhile, Turk Telekom's market share increased from 15.4% to 15.8% during the same period.

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

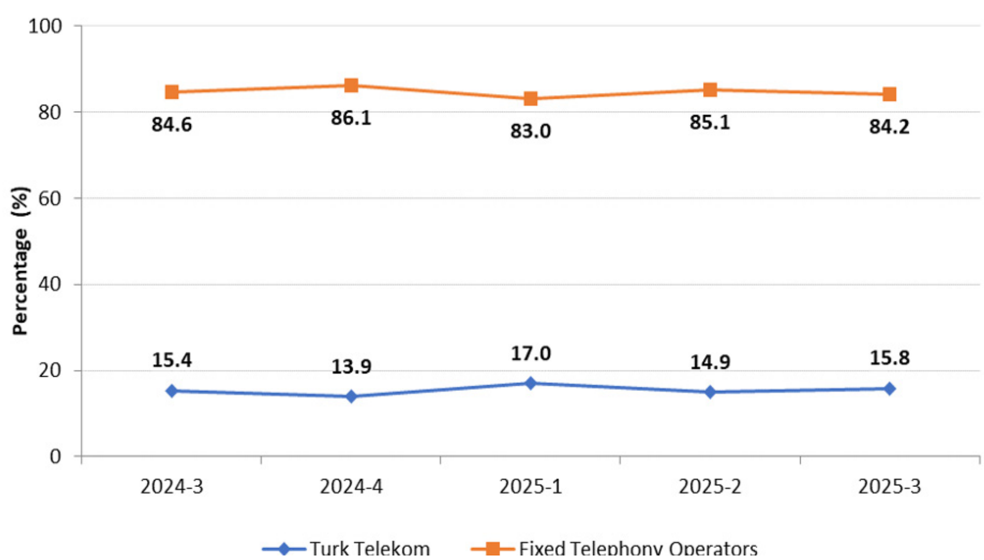
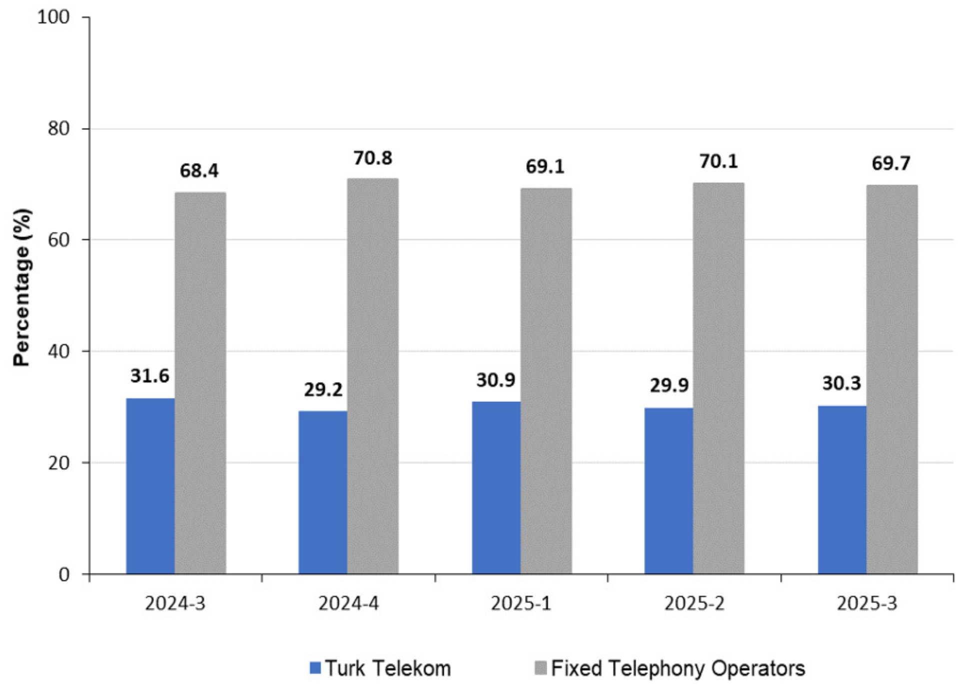


Figure 2-10 illustrates the shares of alternative fixed telephony operators and Turk Telekom in the total traffic originated on the fixed network. While alternative fixed telephony operators accounted for 68.4% share in this traffic in Q3 2024, their share increased to 69.7% in Q3 2025. During the same period, Turk Telekom's share declined from 31.6% to 30.3%.

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 98.2 million in the third quarter of 2025, representing a 0.9% increase compared to the previous quarter. In the fixed broadband segment, the number of fiber subscribers increased by 6%. 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

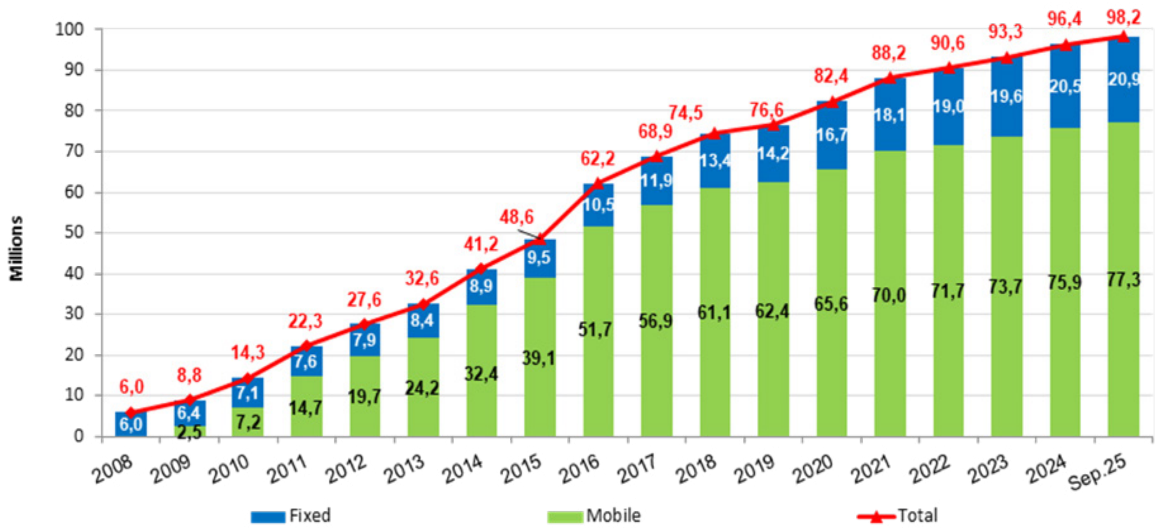


Table 3-1 shows the number of internet subscribers in Türkiye by connection type, along with their quarterly and annual growth rates. As of the third quarter of 2025, total internet subscriptions increased by 0.9% compared to the previous three-month period, while the upward trend in fixed internet continued, particularly with the rise in fiber subscribers. The annual change in the number of internet subscribers was 1.9%.

Table 3-1 Total Number of Internet Subscribers

	2024-3	2025-2	2025-3	Quarterly Growth Rate (2025-2..2025-3)	Annual Growth Rate (2024-3...2025-3)
xDSL	10,201,215	9,607,418	9,209,352	-4.1%	-9.7%
Mobile Internet via Computer	737,030	848,732	813,152	-4.2%	10.3%
Mobile Internet via Phone	75,633,373	75,784,682	76,518,642	1.0%	1.2%
Cable Internet	1,484,186	1,462,907	1,498,565	2.4%	1.0%
Fiber to the Home (FTTH)	6,405,786	7,571,719	8,093,215	6.9%	26.3%
Fiber to the Building (FTTB)	1,233,173	1,198,850	1,199,372	0.0%	-2.7%
Fiber (Total)	7,638,959	8,770,569	9,292,587	6.0%	21.6%
Fixed Wireless Internet	558,342	667,110	703,875	5.5%	26.1%
Other	172,941	219,665	207,270	-5.6%	19.9%
TOTAL	**96,426,046**	**97,361,083**	**98,243,443**	**0.9%**	**1.9%**

Among the total mobile broadband subscribers, there are 930,000 Fixed Wireless (mobile) subscribers and among the Others item, there are 50,000 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 TRY, 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 third quarter of 2025, the total revenue from fixed internet service provision amounted to 28.8 billion TRY. Accordingly, there was an approximate 68% increase in the revenues of fixed broadband service providers compared to the same quarter of 2024.

Table 3-3 Periodic Fixed Broadband Service Revenues, ₺

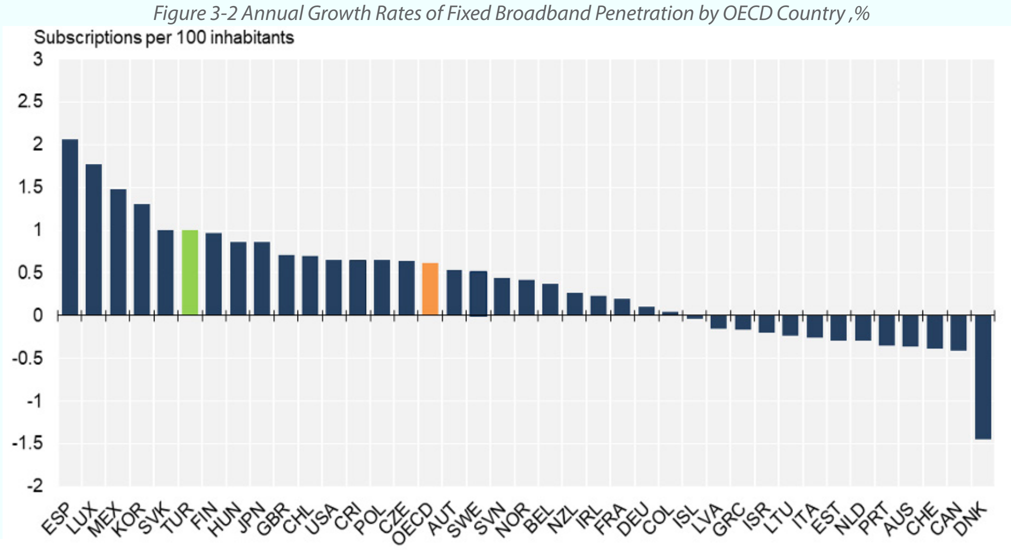
Revenues	2024-3	2024-4	2025-1	2025-2	2025-3
	17,089,823,374	19,327,143,211	21,151,569,648	23,616,740,231	28,774,264,523

3.2 PENETRATION RATES IN OECD COUNTRIES [3]

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 0.62%, whereas in Türkiye it was 1.%.

Furthermore, when examining fixed and mobile broadband penetration rates by population, Türkiye's fixed broadband penetration rate stood at 23.4%, compared to the OECD average of 36.5%. For mobile broadband, the penetration rate in Türkiye was 90.3%, while the OECD average was 139.9%.

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



Source: OECD Broadband Portal, BTK

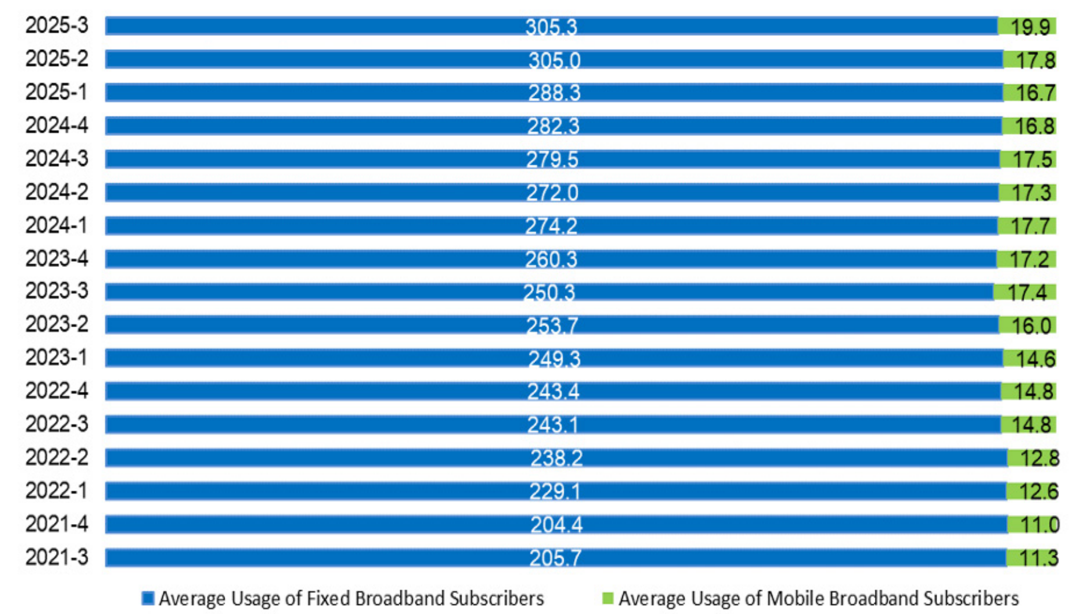
3 *Data for OECD countries are dated June 2024, and data for Türkiye are dated June 2025.*

3.3 USAGE AMOUNTS

In the mobile broadband service, which was launched in July 2009, the number of mobile internet subscribers via computer and mobile phone increased by 0.9% compared to the previous quarter, reaching 77.3 million. During this period, total mobile internet usage increased by 13.1% quarter-on-quarter, amounting to 4.51 million TBytes. In the third quarter of 2025, total fixed broadband internet usage (downloads and uploads), including cable internet, increased by 1% to 18.70 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 third quarter of 2025, the average monthly usage of fixed broadband internet subscribers was 305.3 GBytes, while that of mobile broadband internet subscribers was 19.9 GBytes. Compared to the previous quarter, the average monthly usage per fixed broadband subscriber increased by 0.1%, whereas the average monthly usage per mobile broadband subscriber increased by 12.1%.

Şekil 3-3 Average Monthly Usage per Subscriber, GByte



3.4 DISTRIBUTION OF SUBSCRIBERS BY SPEED AND USAGE

Figure 3-4 shows the distribution of fixed broadband internet subscribers by speed. Accordingly, in the third quarter of 2025, approximately 9.5% of fixed broadband subscribers in Türkiye opted for packages offering speeds between 10-16 Mbps, while 10.6% opted for packages offering speeds between 16-24 Mbps. Furthermore, 40.4% of subscribers preferred connections with speeds between 24-50 Mbps, and 37.9% preferred connections with speeds above 50 Mbps.

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

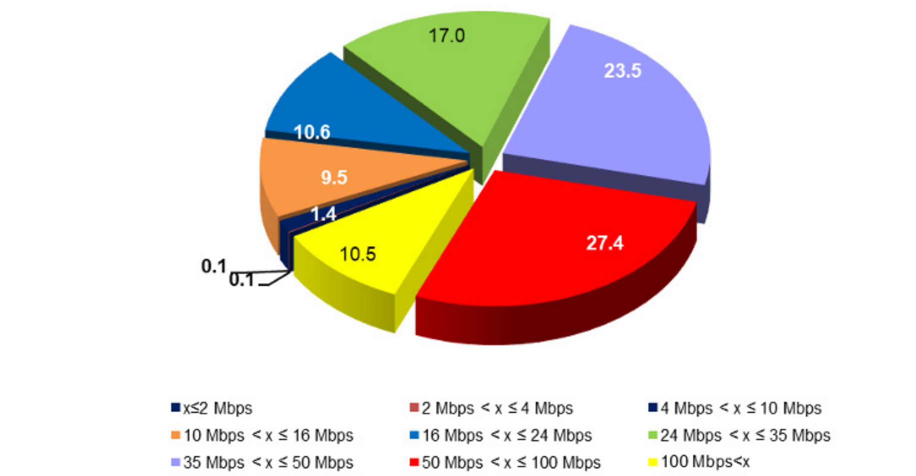


Figure 3-5 shows the distribution of mobile internet subscribers (via computer) based on their data usage. The figure indicates that 75.5% of subscribers used more than 100 MBytes. In contrast, 21.3% of subscribers fall within the 0–50 MByte range, representing the lowest usage group.

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

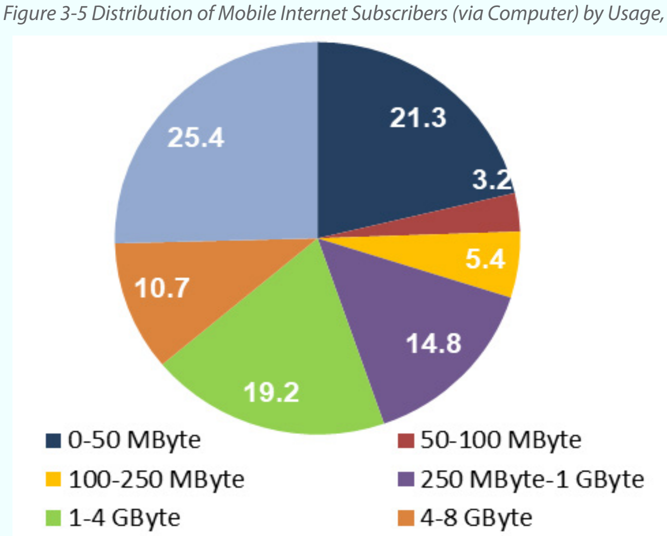
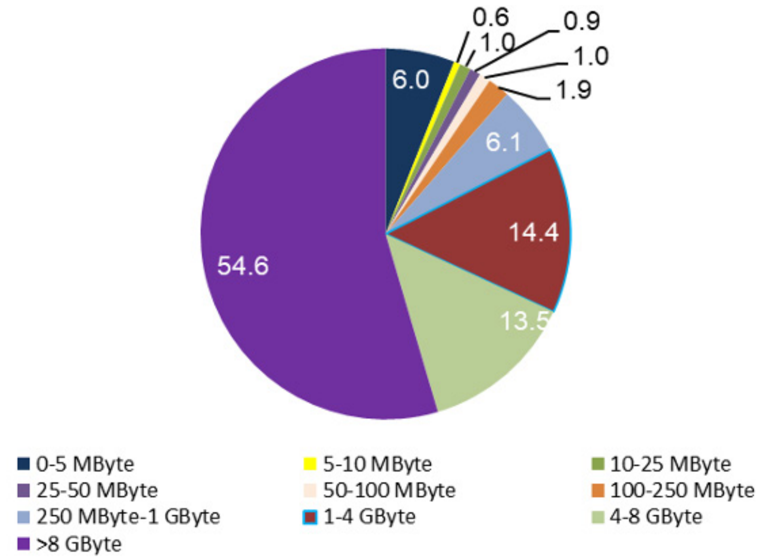


Figure 3-6 presents the distribution of mobile internet subscribers (via mobile phone) based on their data usage. Among these subscribers, 90.5% have a usage exceeding 100 MBytes. The distribution also shows a concentration in the usage segment above 8 GBytes, which accounts for 54.6% of subscribers.

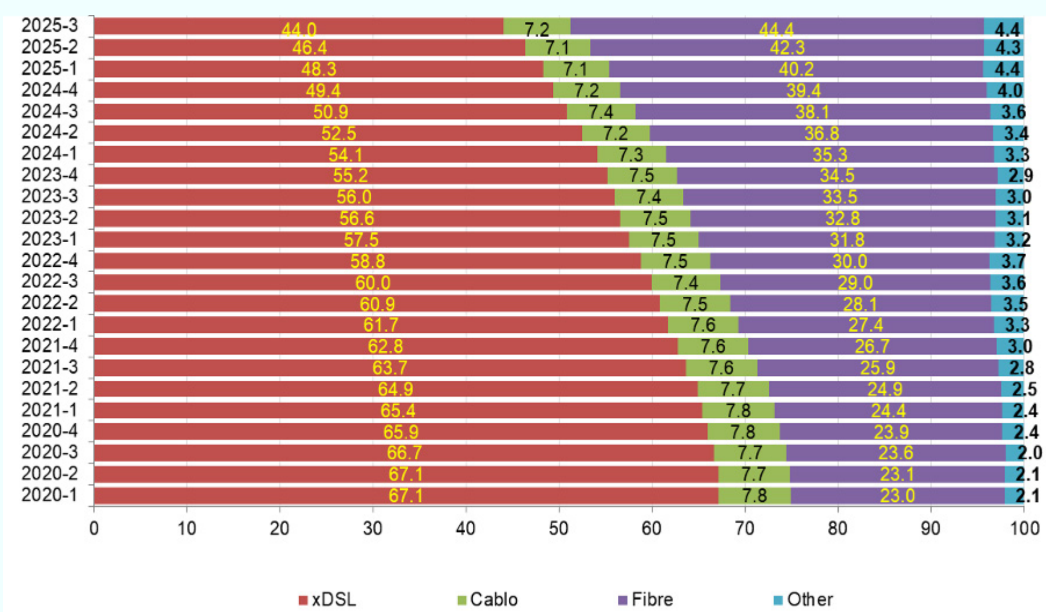
Figure 3-6 Distribution of Mobile Internet Subscribers (via Mobile Phone) by Usage, %



3.5 DISTRIBUTION OF SUBSCRIBERS BASED ON TECHNOLOGY

Figure 3-7 presents the distribution of fixed broadband subscribers in Türkiye by technology. As of the third quarter of 2025, the share of subscribers served via xDSL technology within the total fixed broadband market continued to decline, falling to 44%. While the market share of cable internet subscribers stood at 7.2%, the share of fiber internet subscribers within the total fixed broadband market continued to increase, reaching 44.4%.

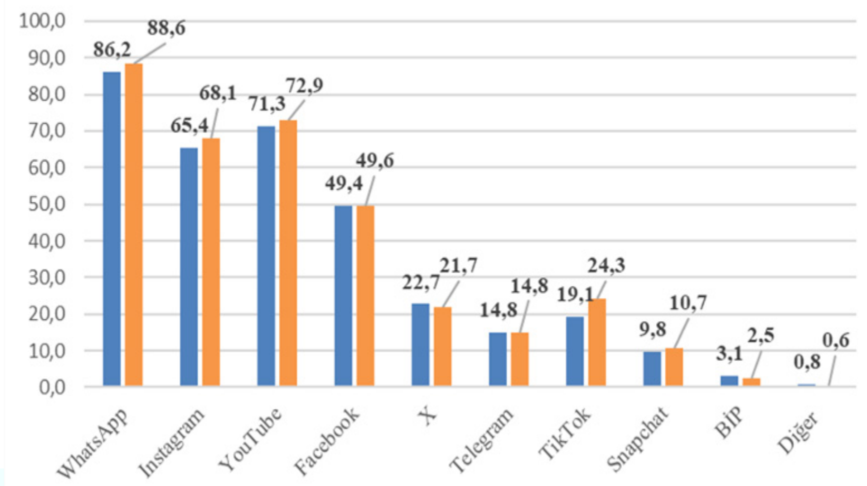
Figure 3-7 Distribution of Fixed Broadband Subscribers by Technology, %



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 2025. According to the survey results, the top three platforms used for social media are WhatsApp, Instagram, and YouTube, respectively.

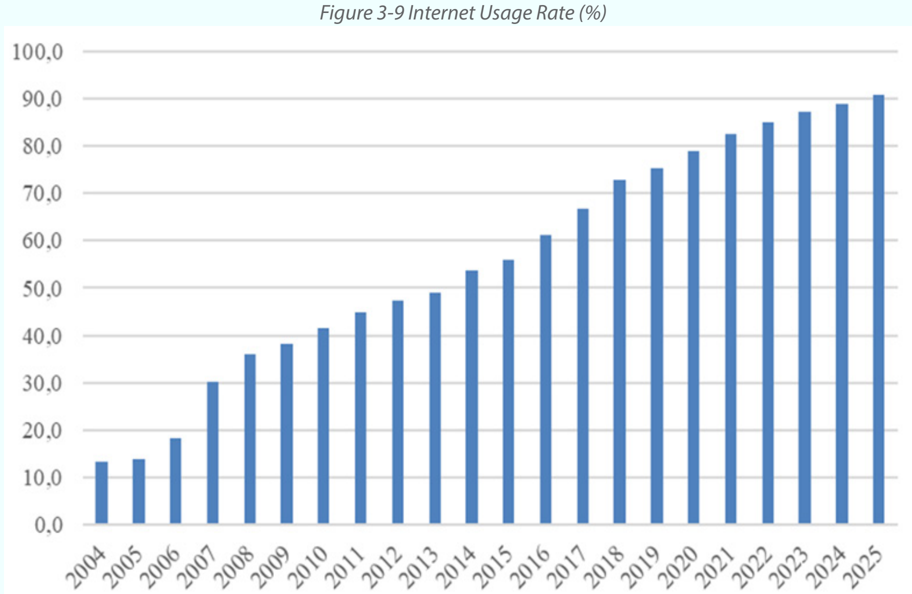
Figure 3-8 Rate of Social Media and Messaging Application Usage (%)



TÜİK, Household Information Technologies (IT) Usage Survey, 2025

According to the results of the Household Information Technologies Usage Survey conducted by TÜİK (Turkish Statistical Institute) in Figure 3-9, the Internet usage rate, which was 13.3% in 2004, has increased by 6.8 times in approximately twenty years, reaching 90.6%.

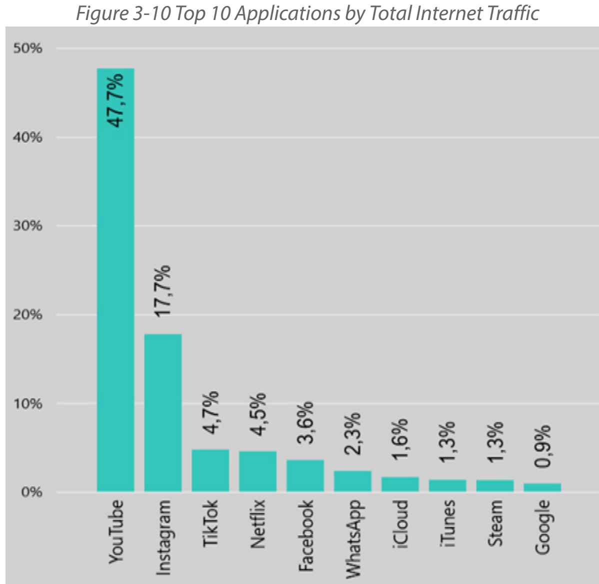
Figure 3-9 Internet Usage Rate (%)



TÜİK, Household Information Technology (IT) Usage Survey, 2004-2025

Figure 3.10 shows the top 10 apps across all categories by total internet traffic. As the chart shows, YouTube is by far the app with the largest share of total internet traffic. YouTube leads in user data consumption with 47.7% of traffic, followed by Instagram with 17.7% and Netflix with 4.7%. This data demonstrates that user behavior is largely driven by video content consumption, and social media platforms also account for a significant portion of internet traffic.

Figure 3-10 Top 10 Applications by Total Internet Traffic



According to the data in Figure 3-11, the Streaming Media category includes applications commonly used by users. According to the graph, YouTube is by far the most popular application. With a 60.8% share of total traffic, YouTube is followed by Instagram at 15.7% and TikTok at 6%. This data demonstrates that video content platforms are a major driver of digital media consumption, with user trends largely shifting towards audiovisual content.

Figure 3-11 Applications Used in the Streaming Media Category

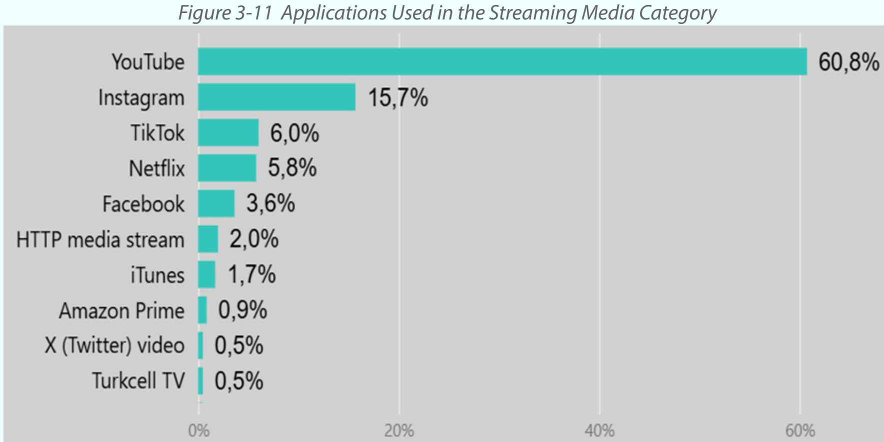


Figure 3-12 shows the most commonly used applications in the Instant Messaging category. According to the data in the chart, Instagram is the most widely used application in the Instant Messaging category, representing 74%. Instagram is followed by Facebook (7.9%) and Telegram (7.7%). These three applications constitute the majority of total traffic and stand out as the primary platforms through which users meet their instant communication needs. The data indicates that users are increasingly turning to social media-based platforms for instant messaging applications, while traditional messaging services are increasingly used to a limited extent.

Figure 3-12 Applications Used in the Instant Messaging Category

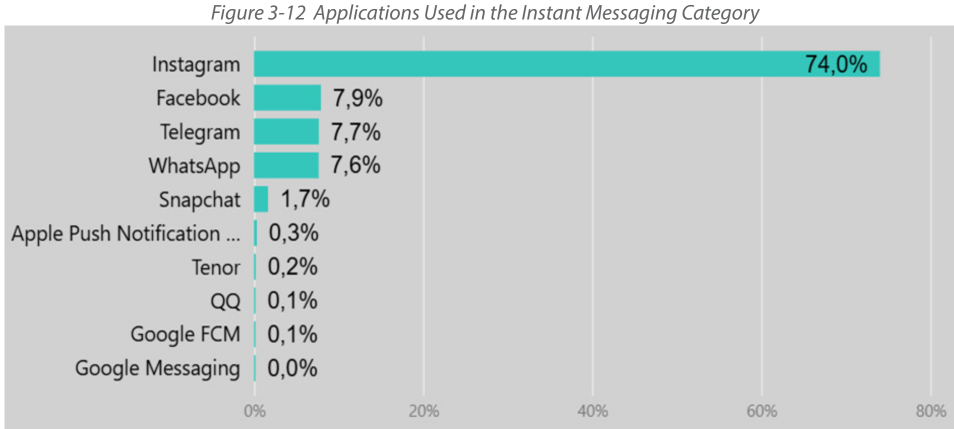


Figure 3-13 shows the most commonly used applications in the VOIP (Voice over IP) category. According to the chart, WhatsApp is by far the most widely used application in the VoIP category. WhatsApp leads the pack, accounting for 58.5% of total traffic. It is followed by FaceTime with 11.5%, Snapchat with 6.9%, Facebook with 4.4%, and RTP with 3.0%. These top five applications are among users' top choices for meeting their voice and video communication needs. This data demonstrates that mobile-based communication applications are becoming dominant in VoIP traffic and, in conjunction with traditional video conferencing solutions, a more versatile usage pattern has developed.

Figure 3-13 Applications Used in the VOIP Category

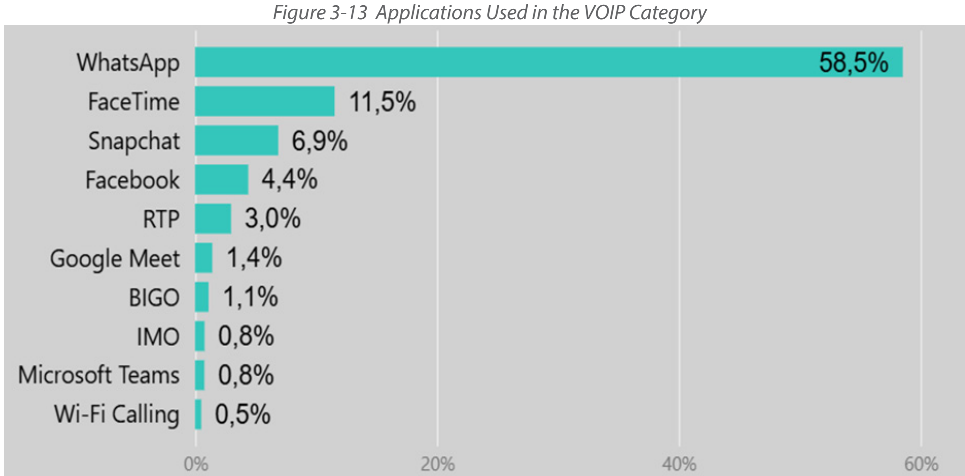


Figure 3-14 shows the most commonly used applications in the Online Games category. According to the data in this chart, Steam is by far the most widely used application platform in the Online Games category. Accounting for almost half of the internet traffic in this category at 34.3%, Steam stands out as the primary platform for accessing game content. It is followed by PlayStation (6.6%), League of Legends (%5.1), and PUBG (3.3%). This data demonstrates that online game traffic is largely concentrated on platforms with high multiplayer and high content volume, while mobile and indie games also have a significant user base.

Figure 3-14 Applications Used in the Online Games Category

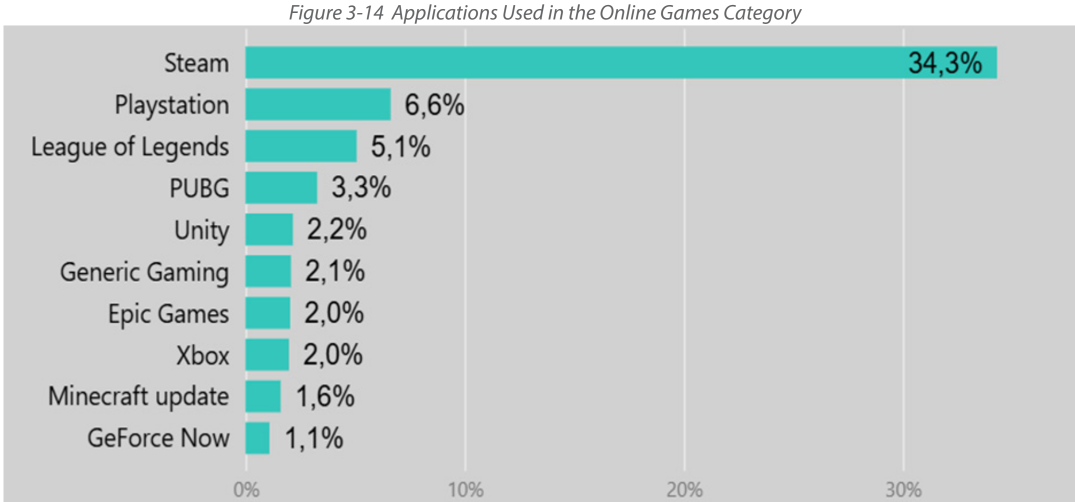


Figure 3-15 shows commonly used applications in the Network Storage category. According to the chart, iCloud is the most widely used application in the Network Storage category. iCloud leads the pack in this category with 65.9%, and is particularly popular for data synchronization and backup services between devices within the Apple ecosystem. It is followed by Google Cloud Storage with 8.6% and Google Photos with 8.4%. This data demonstrates that Apple and Google services are leading the competition in the cloud storage space, while integrated solutions for data sharing, advertising, and software services also hold significant positions in this category.

Figure 3-15 Applications Used in the Network Storage Category

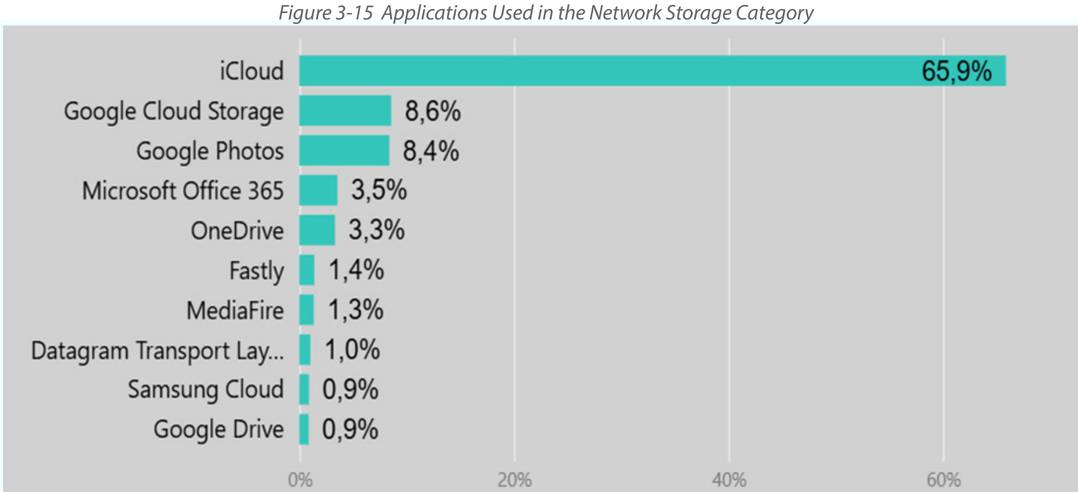


Figure 3-16 shows the most commonly used applications in the Web Browsing category. According to the chart, QUIC is the protocol and service that generates the most traffic in the Web Browsing category. With 61.9%, QUIC stands out by far, particularly thanks to its low latency and faster connection establishment, making it widely used in modern web browsing experiences. It is followed by SSL v3 at 5.7% and Google services at 5.3%. This data demonstrates that internet users largely prefer services that provide secure, optimized, and fast connections, and that this preference is based on the intensive use of technologies and protocols behind the web experience.

Figure 3-16 Applications Used in the Web Browsing Category

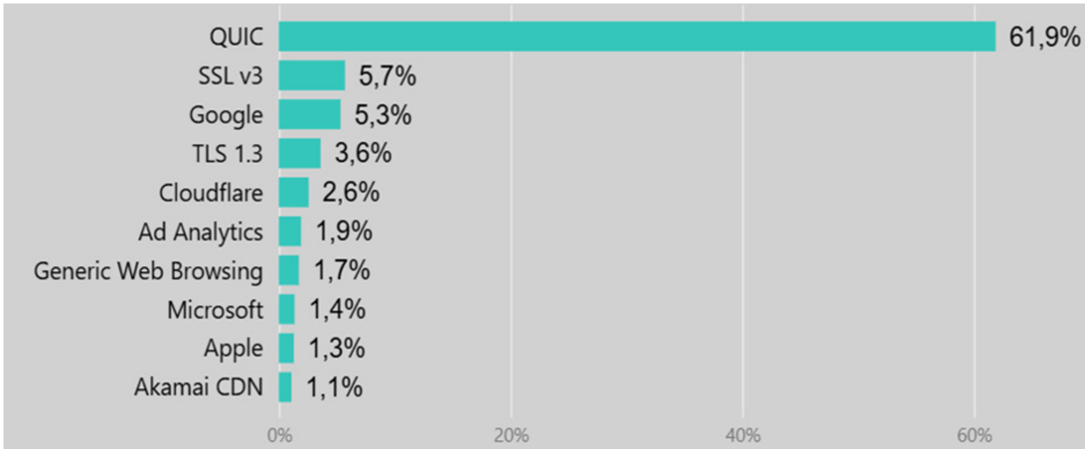


Figure 3-17 shows commonly used applications in the Software Updates category. According to the chart, Apple Software Update generated the most traffic in the Software Updates category. Apple Software Update led the way with 35.7%, followed by Google Play at 20.5% and iTunes Store at 14.7%. These three platforms dominate total update traffic. This data demonstrates that software updates are particularly prevalent among major platform providers (Google, Apple, Microsoft, Sony), and that user devices are constantly updated for security, performance, and functionality.

Figure 3-17 Applications Used in the Software Updates Category

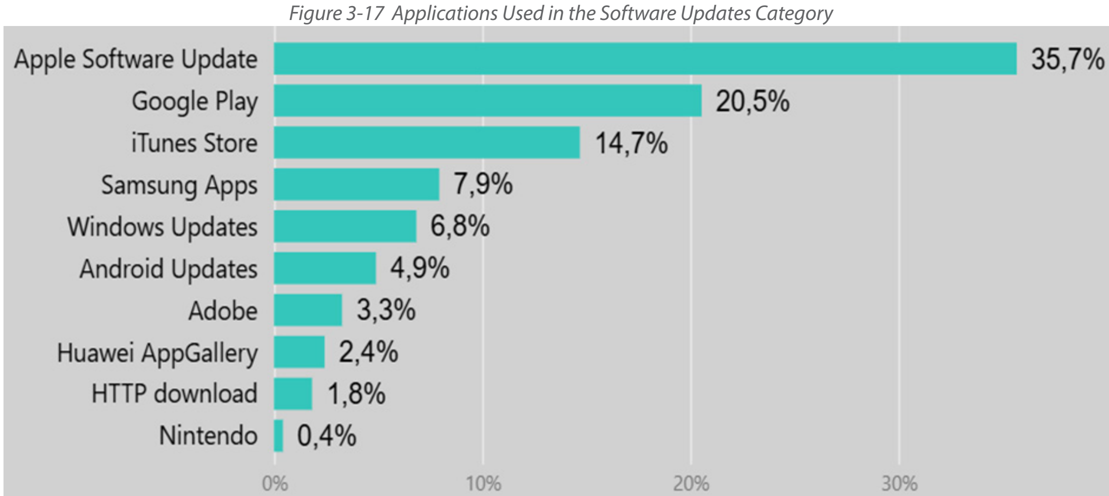
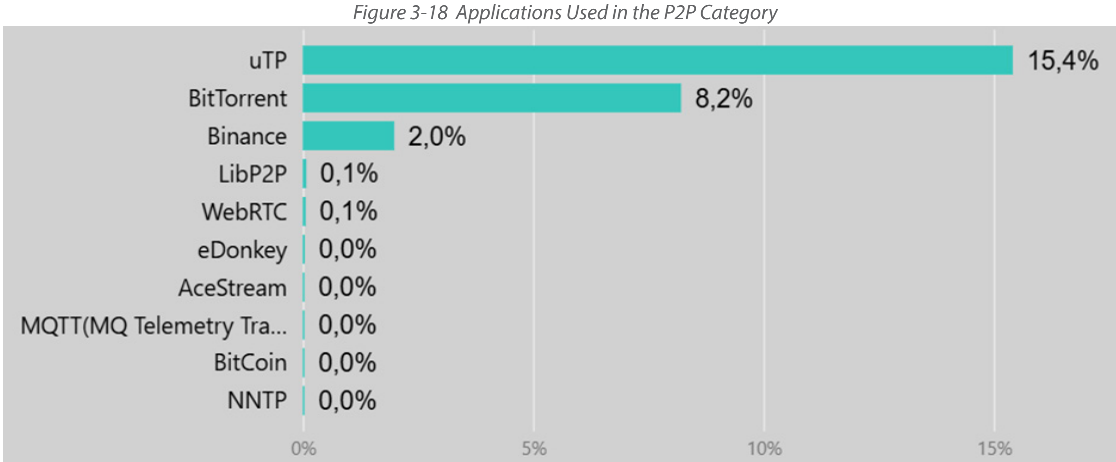


Figure 3-18 shows the most commonly used applications in the P2P (Peer-to-Peer) category. According to the chart, uTP is the most widely used application in the P2P category. This application ranks first with 15.8%, followed by BitTorrent with 8.2% and Binance with 2%. This data demonstrates that P2P structures are largely driven by a small number of dominant protocols, and that traditional applications are beginning to give way to more integrated solutions..

Figure 3-18 Applications Used in the P2P Category



PART 4

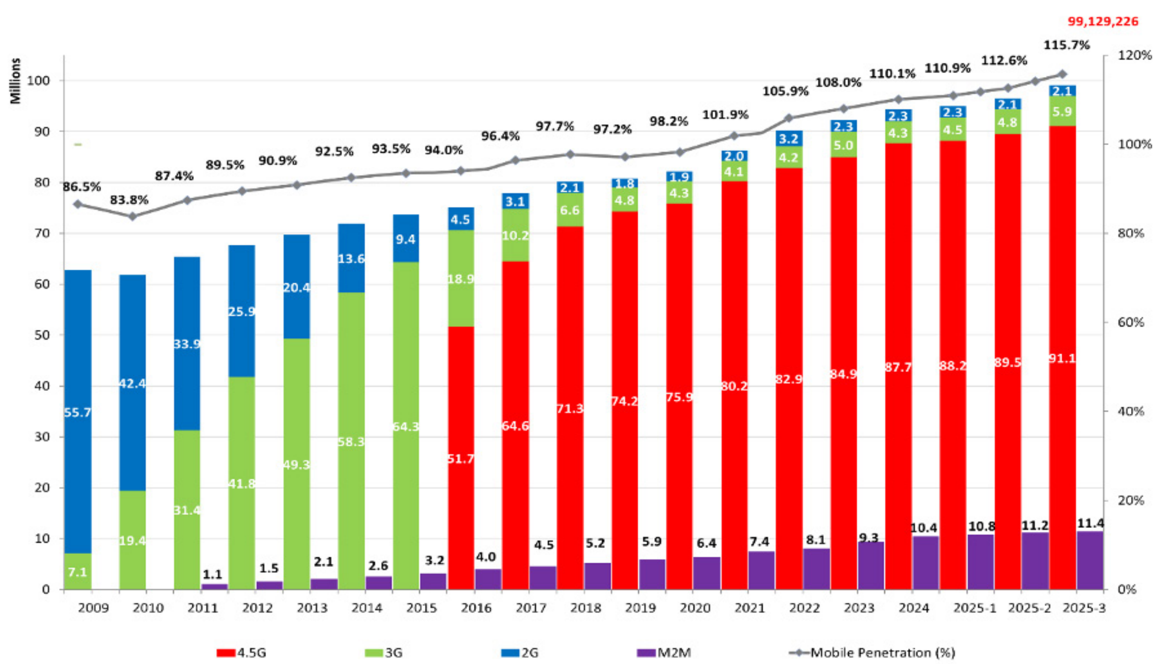
MOBILE MARKET DATA

4 MOBILE MARKET DATA

4.1 NUMBER OF SUBSCRIBERS AND PENETRATION

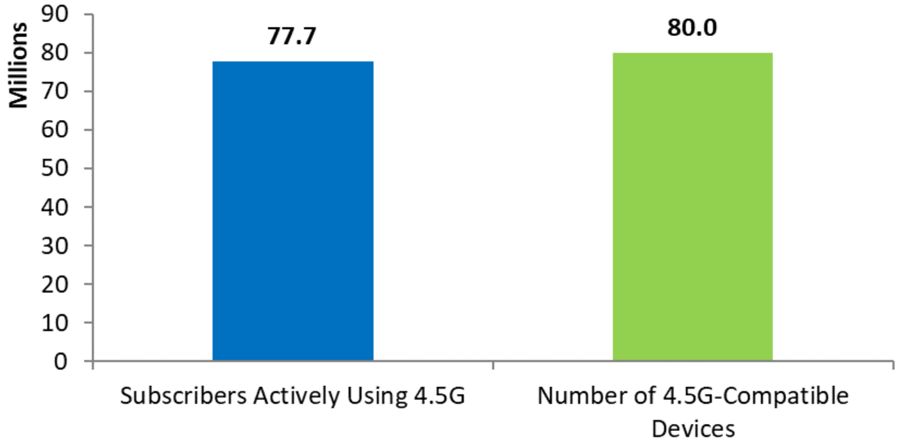
As of the end of September 2025, there are a total of 99,129,226 mobile subscribers in Türkiye, including machine-to-machine (M2M) subscribers, corresponding to a penetration rate of approximately 115.7%. The 3G service, which was launched in July 2009, reached 65,949,652 subscribers as of the end of 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 September 2025, the number of 3G subscribers was 5,887,769, while the number of 4.5G subscribers increased to 91,099,845. 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 September 2025, the number of machine-to-machine communication (M2M) subscribers was 11.4 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 77,710,446 at the end of September 2025, while the number of 4.5G compatible devices was 79,959,466 (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 118.2%.[4]

Figure 4-3 The Number of Mobile Subscribers and Penetration Rate Based on Population Excluding Ages 0–9 [5]

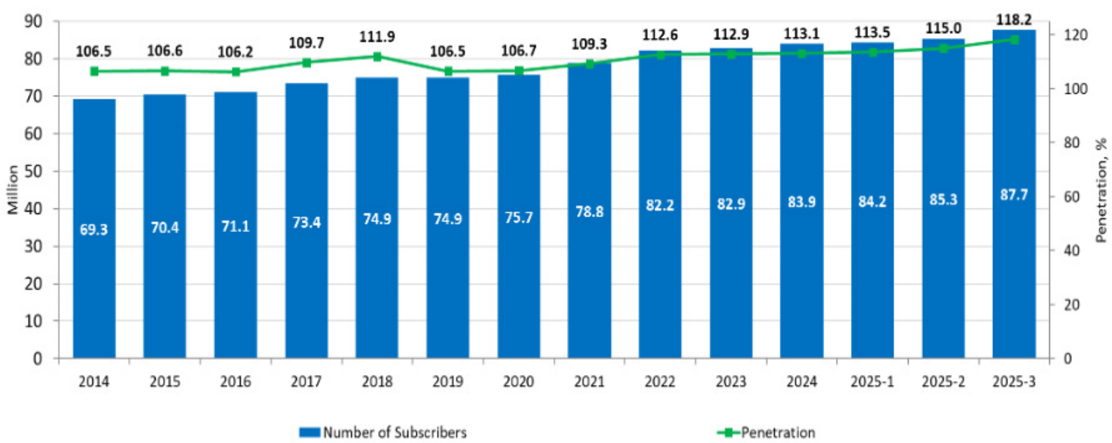


Table 4-1 presents data on 3G and 4.5G services. In the third quarter of 2025, the number of 3G subscribers was 5,887,769 , while the number of 4.5G subscribers reached 91,099,845. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with 3G and 4.5G services was 77,331,794, and the number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with only 4.5G service was 73,010,745. The total mobile Internet usage amount in the third quarter of 2025 was 4,508,636 TBytes, and the total mobile Internet usage amount of 4.5G users was 4,377,602 TBytes.

4 *As of December 31, 2024, the population of Türkiye, excluding the population aged 0-9, is 74,197,473 (TurkStat)*
5 *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**

	2024-1	2024-2	2024-3	2024-4	2025-1	2025-2	2025-3
Number of 3G Subscribers	4,967,065	4,689,475	4,610,156	4,345,125	4,546,099	4,829,995	5,887,769
Number of 4.5G Subscribers	85,629,126	86,341,351	87,537,163	87,662,081	88,184,767	89,513,414	91,099,845
Number of Mobile Computer Internet Users (Total)	666,345	747,220	737,030	706,492	757,744	848,732	813,152
Number of Mobile Computer Internet Users (4.5G)	519,177	600,762	569,586	567.414	608,625	702,219	679,277
Mobile Internet Usage via Handsets (Total)	73,727,551	74,865,156	75,633,373	75,180,553	74,526,293	75,784,682	76,518,642
Mobile Internet Usage via Handsets (4.5G)	68,467,226	69,772,287	70,415,172	70.039.380	70,081,445	71,358,163	72,331,468
Mobile Internet Usage via other devices, TByte (Total)	3,853,021	3,825,341	3,919,929	3,744,694	3,690,971	3,986,733	4,508,636
Mobile Internet Usage via other devices, TByte (4.5G)	3,731,462	3,694,187	3,792,346	3,617,609	3,576,414	3,863,141	4,377,602

**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 third quarter of 2025, the number of prepaid mobile broadband subscribers was 12,896,491and the number of postpaid mobile broadband subscribers was 62,986,645.

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

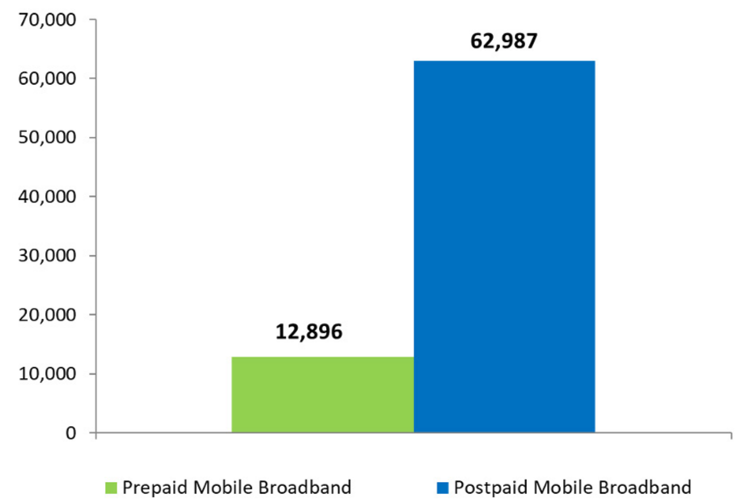
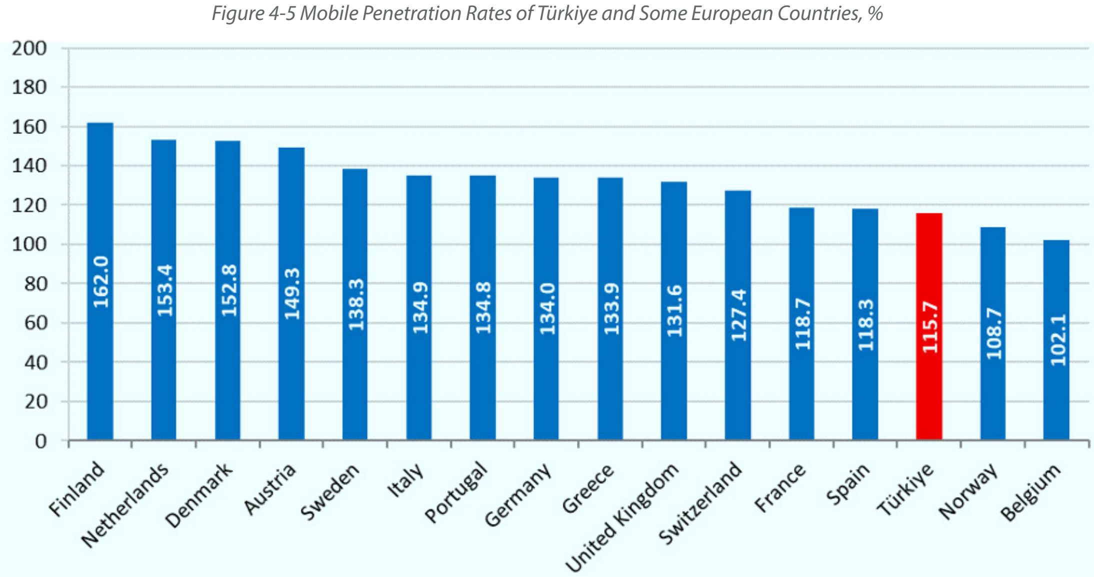


Figure 4-5 compares the mobile penetration rates of Türkiye and some European countries. As of the third quarter of 2025, the ones with the highest mobile penetration rates among European countries are Finland, Netherlands, Denmark, Austria and Sweden. The average mobile penetration rate of the listed countries is approximately 133.4%. In Türkiye, the mobile penetration rate is 115.7% as of September 2025.

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

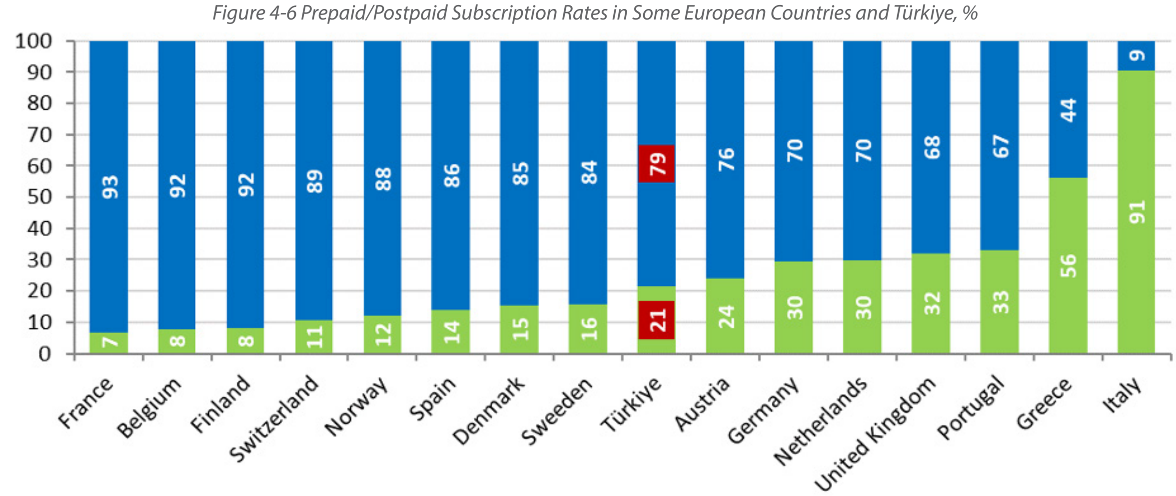


Source: GSMA Intelligence 2025-Q3, BTK.

4.2 MOBILE SUBCRIBER PROFILE

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

Figure 4-6 Prepaid/Postpaid Subscription Rates in Some European Countries and Türkiye, %



Source: GSMA Intelligence 2025-Q3, BTK.

Figure 4-7 shows the total number of subscribers in mobile network operators quarterly. The number of subscribers increased by 8% for TT Mobil, by 0.2% for Vodafone and by 0.8% for Turkcell in the third quarter of 2025, compared to the previous quarter.

Figure 4-7 Total Number of Subscribers by Mobile Operator, Million

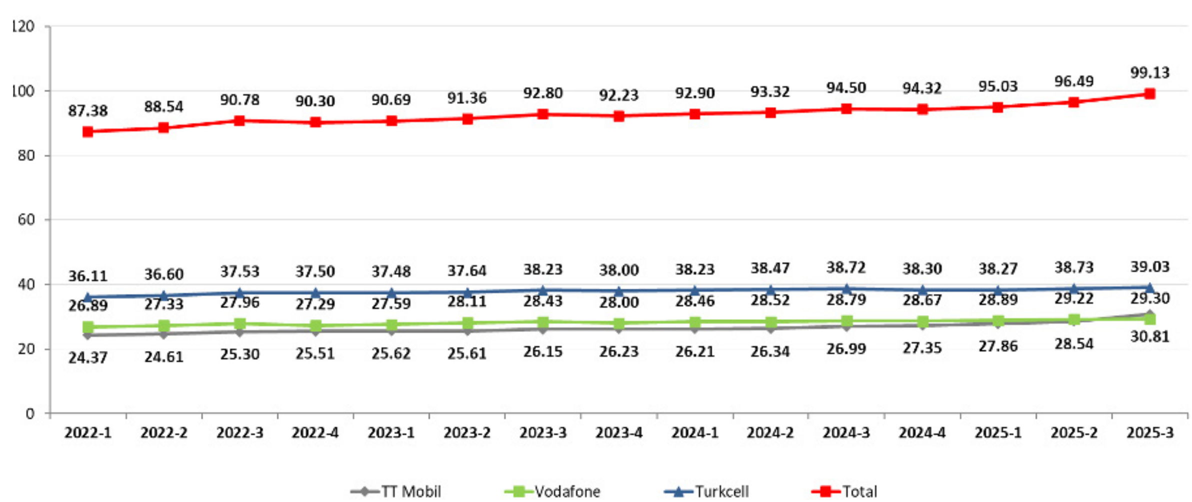


Figure 4-8 presents the number of successfully ported mobile numbers quarterly. In the third quarter of 2025, the number of ported mobile numbers decreased by 1.3% compared to the previous quarter, totaling 4,896,014. As of September 30, 2025, a cumulative total of 202,885,752 numbers are ported.[6]

6 *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 4-8 Total Number of Mobile Number Portability Transactions

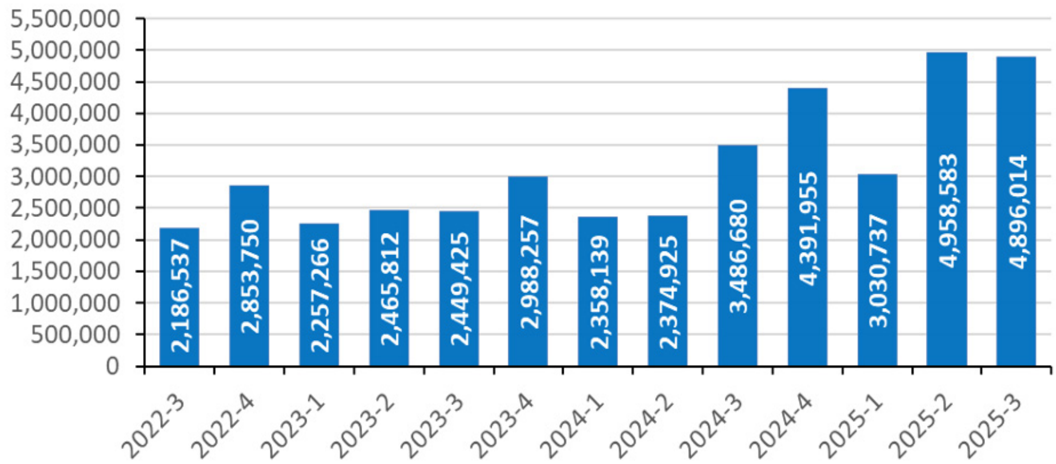


Figure 4-9 presents the quarterly net number of subscribers gained by mobile operators through mobile number portability (MNP). Through the Mobile Number Portability (MNP) service, in the third quarter of 2025, TT Mobil gained approximately 197,000 subscribes while Turkcell lost approximately 116,000 subscribers while and Vodafone lost approximately 82,000 subscribers.

Figure 4-9 Net Number of Incoming Subscribers to Mobile Operators via MNP, Thousands

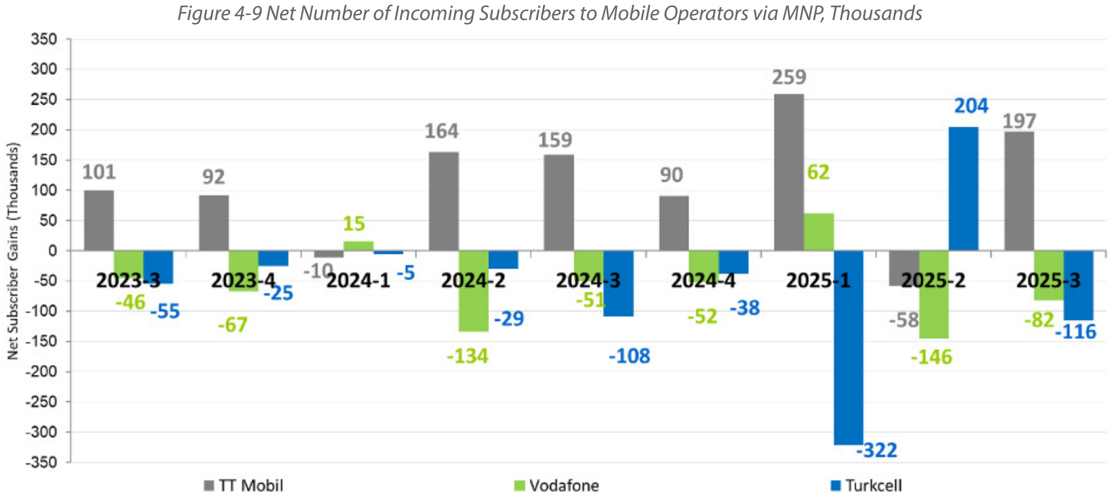


Figure 4-10 shows the market shares of mobile operators based on the number of subscribers. As of the third quarter of 2025, based on the number of subscribers, Turkcell holds a market share of 39.4%, TT Mobil 31.1% and Vodafone 29.6%.

Figure 4-10 Market Shares of Mobile Operators by Number of Subscribers (%)

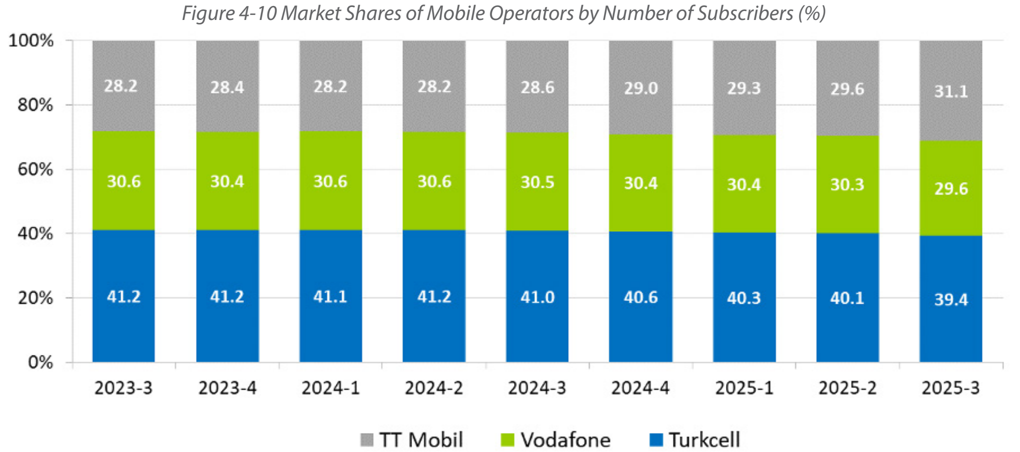
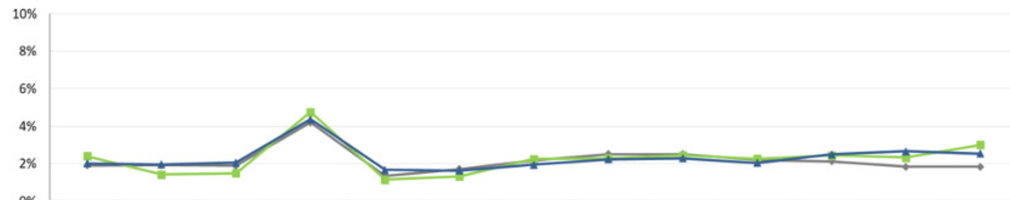


Figure 4-11 presents the monthly subscriber churn rates of mobile operators for the past 12 months, including the third quarter of 2025. As of September 2025, the subscriber churn rates of TT Mobil, Vodafone, and Turkcell were 1.8%, 3%, and 2.5%, respectively.

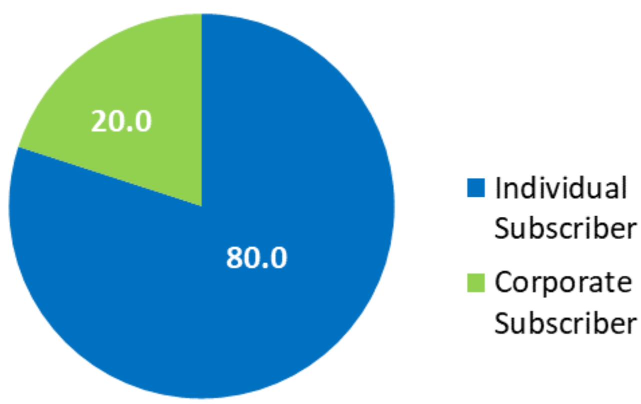
Figure 4-11Subscriber Churn Rates of Mobile Operators (%)



	September 24	October 24	November 24	December 24	January 25	February 25	March 25	April 25	May 25	June 25	July 25	August 25	September 25
TT Mobil	1.9%	1.9%	1.9%	4.2%	1.3%	1.7%	2.2%	2.5%	2.5%	2.2%	2.1%	1.8%	1.8%
Vodafone	2.4%	1.4%	1.5%	4.8%	1.1%	1.3%	2.2%	2.3%	2.4%	2.3%	2.4%	2.3%	3.0%
Turkcell	2.0%	2.0%	2.0%	4.4%	1.7%	1.6%	1.9%	2.2%	2.3%	2.0%	2.5%	2.7%	2.5%

Figure 4-12 examines the subscriber base of mobile operators by type: individual(real persons) vs. corporate (legal entities). As of the third quarter of 2025, approximately 80% of mobile subscribers were personal while 20% were corporate.

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



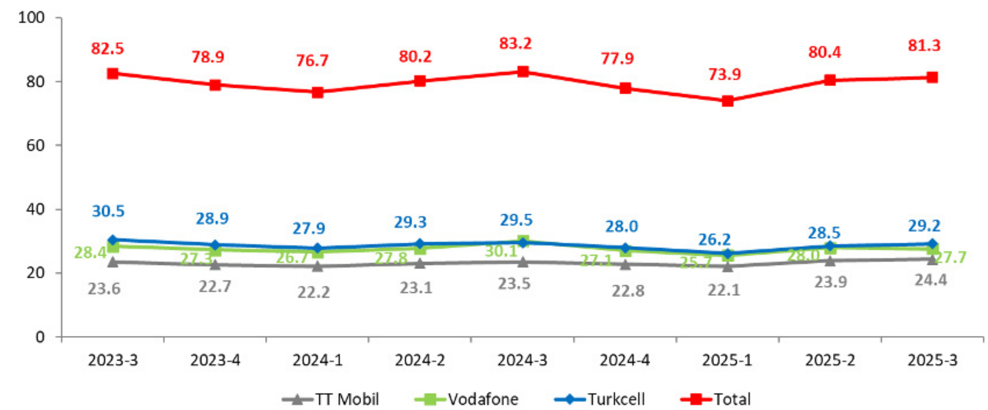
4.3 MOBILE TRAFFIC VOLUME

Total mobile traffic volume in the third quarter of 2025 was 81.3 billion minutes. When traffic data for the third three months of 2025 is compared to the previous three-month period, it is seen that total mobile traffic increased by 1% and decreased by 2.3% compared to the same period of last year.

When examined on an operator basis, it is seen that Turkcell's traffic volume increased by 2.4%, TT Mobil's traffic volume increased by 2%, while Vodafone's traffic volume decreased by 1.2% compared to the previous period. Compared to the same period of the previous year, Turkcell's traffic volume decreased by 1.2%, Vodafone's traffic volume decreased by 8.2%, while TT Mobil's traffic volume increased by 3.8%. The changes in mobile traffic volume[7] across the periods are presented in Figure 4-13.

7 *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. Compared to the previous period, TT Mobil and Turkcell's market share in terms of traffic increased from 29.8% to 30.1% and from 35.5% to 35.9% respectively, while Vodafone's market share decreased from 34.8% to 34%. When compared to the same period of the last year, TT Mobil's market share increased from 28.3% to 30.1%, Turkcell's market share increased from 35.5% to 35.9% and Vodafone's market share decreased from 36.2% to 34%.

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

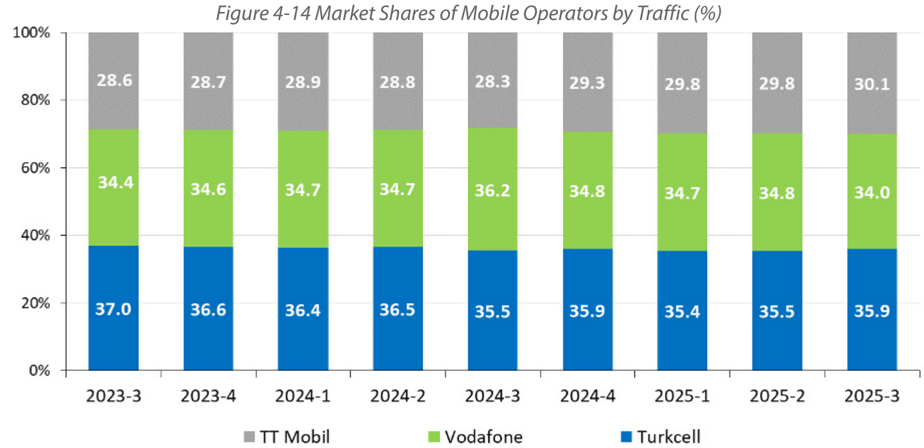
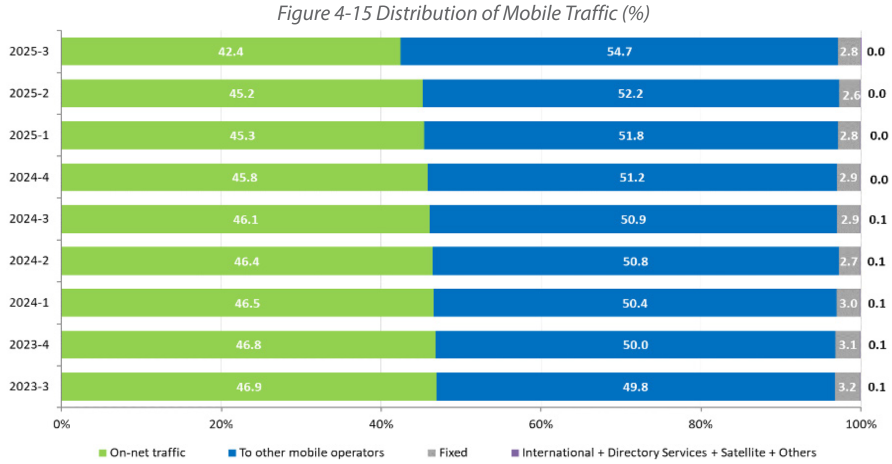


Figure 4-15 presents the distribution of total traffic generated by mobile operators. In the third quarter of 2025, the majority of this traffic (54.7%) is calls from one mobile operator to the other mobile operators. On-net traffic, which refers to calls between subscribers of the same operator, accounted for 42.4% of the total traffic.

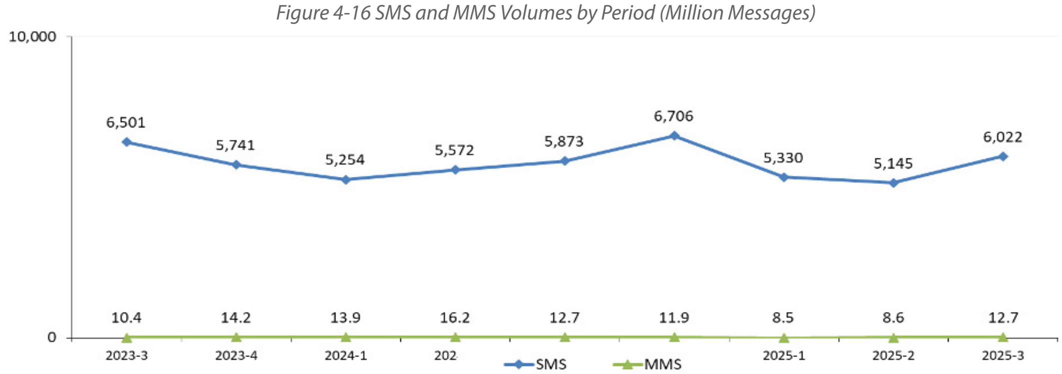
Figure 4-15 Distribution of Mobile Traffic (%)



4.4 SMS AND MMS

The total number of SMS was approximately 6 billion, while the number of MMS was around 12.7 million in the third 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 ₺

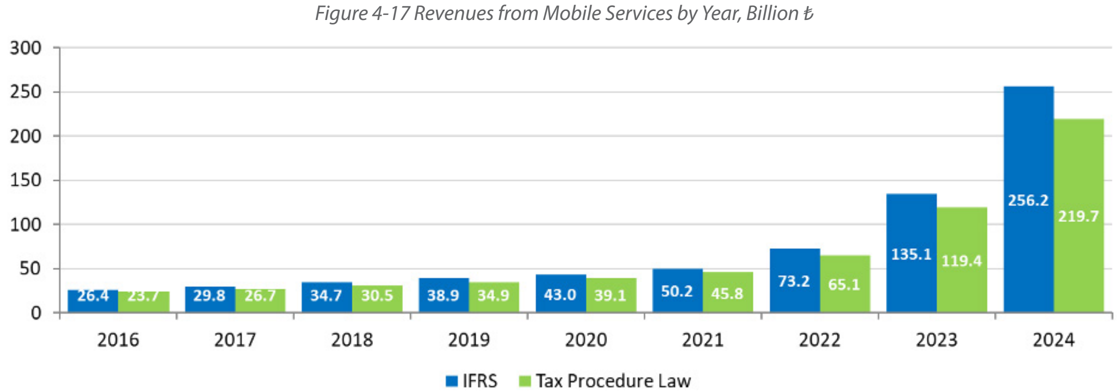
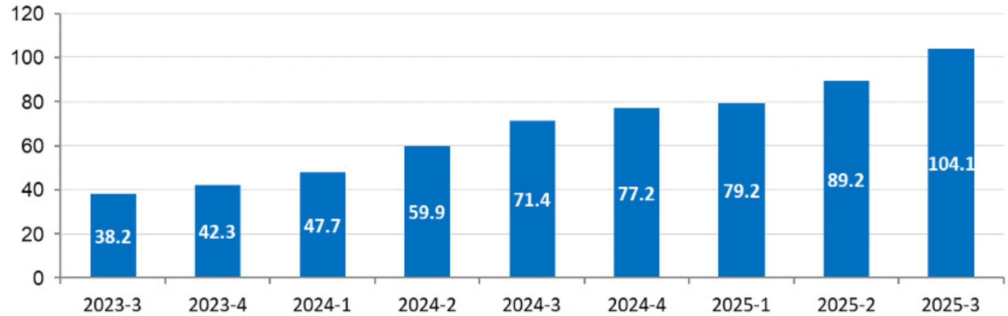


Figure 4-18 shows the quarterly revenues of operators from mobile telecommunication services starting from the third quarter of 2023. In the third quarter of 2025, mobile service revenues amounted to approximately ₺104.1 billion.

*Figure 4-18 Quarterly Revenues from Mobile Services, 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 third quarter of 2025, Turkcell's market share was 43%, Vodafone's market share was 33.9% and TT Mobil's market share was 23.1%. In the third quarter of 2025, compared to the previous period, TT Mobil's market share decreased by 1.3, Vodafone's market share decreased by 1.2, while Turkcell's market share increased by 2.4. Compared to the same period in 2024, Vodafone's market share decreased by 0.6, Turkcell's market share decreased by 0.1 and TT Mobil's market share increased by 0.7.

Figure 4-19 Market Share of Mobile Operators by Total Revenue, %

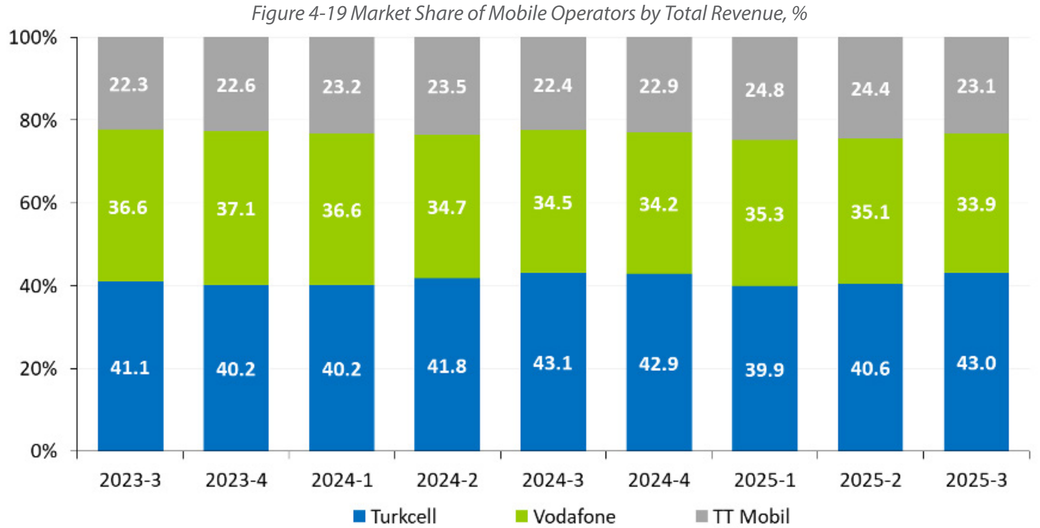
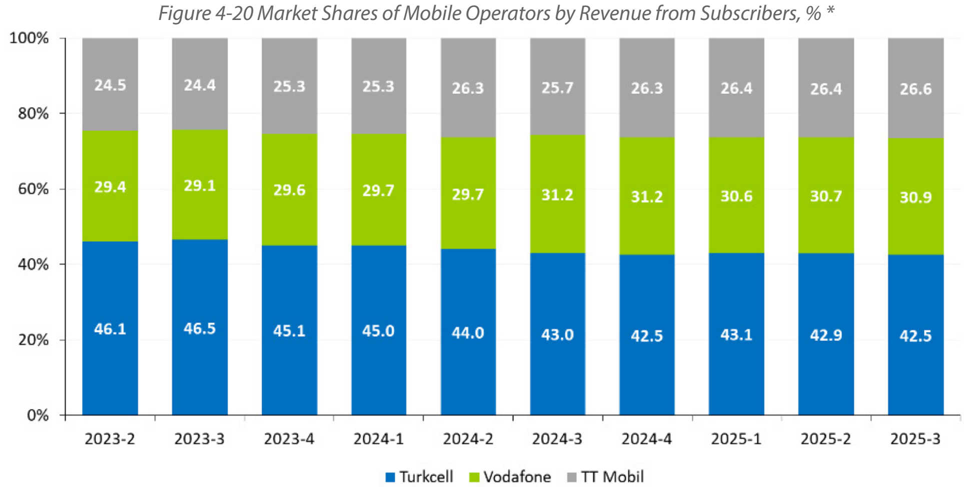


Figure 4-20 shows the market shares of mobile operators based on their revenues from subscribers. As of the third quarter of 2025, Turkcell's market share was 42.5%, while Vodafone and TT Mobil's market shares were 30.9% and 26.6%, respectively.

*Figure 4-20 Market Shares of Mobile Operators by Revenue from Subscribers, % **



**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 4-21 Distribution of Mobile Operators' Revenue, %

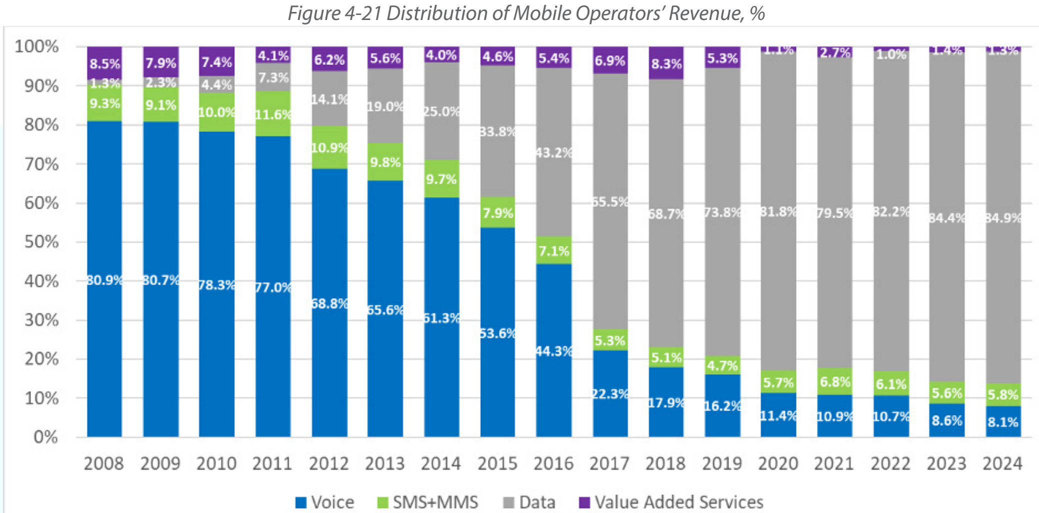
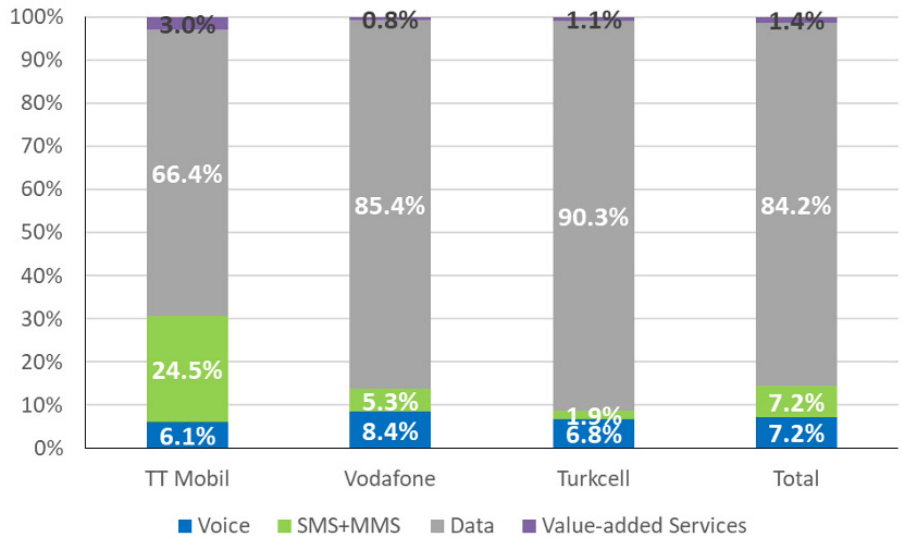


Figure 4-22 presents a comparative breakdown of total revenues of each mobile operator as of the third quarter of 2025. As of the third quarter of 2025, telephony revenues accounted for 6.1% of TT Mobil's revenues, 8.4% of Vodafone's revenues and 6.8% of Turkcell's revenues. SMS and MMS revenues accounted for 24.5% of TT Mobil's revenues, 5.3% of Vodafone's revenues and 1.9% of Turkcell's revenues. Data revenues accounted for 66.4% of TT Mobil's, 85.4% of Vodafone's and 90.3% of Turkcell's revenues[8]

8 *2014-3. As of Q3 2014, M2M revenues are included in data revenues.*

Figure 4-22 Revenue Distribution of Mobile Operators %



4.6 AVARAGE REVENUE PER USER (ARPU)

ARPU which is the avarage 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 third quarter of 2025, the avarage monthly revenue per subscriber for Turkcell is ₺327.4, for Vodafone ₺316.4 and for TT Mobil ₺259.2.

Figure 4-23 Mobile ARPU, ₺

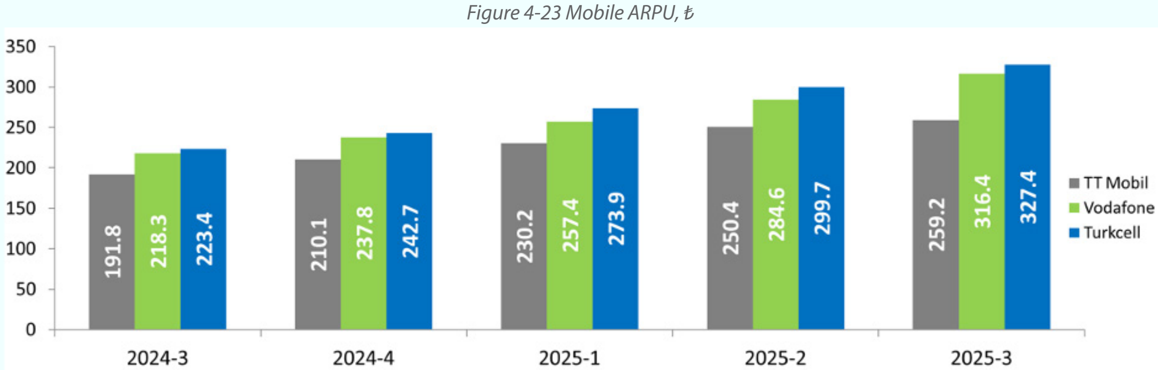
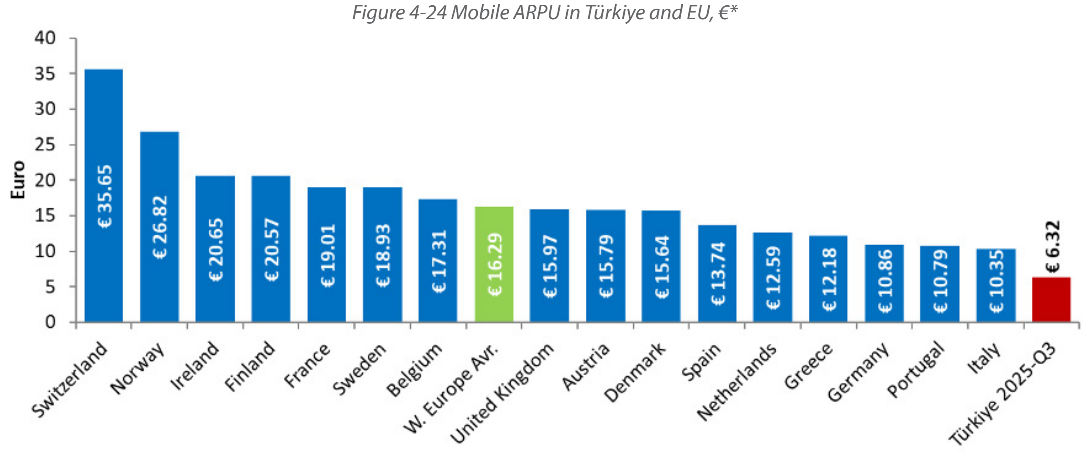


Figure 4-24 compares mobile ARPU figures for some European countries and Türkiye. While the average ARPU in the European countries examined in the figure is 16.29 €, it is 6.32 € in Türkiye for the third quarter of 2025.

Figure 4-24 Mobile ARPU in Türkiye and EU, €*



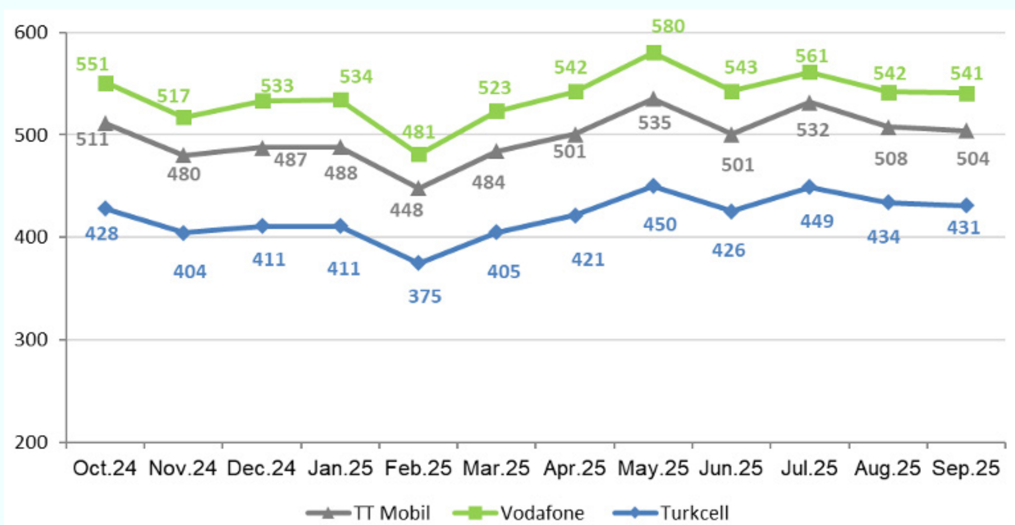
Source: GSMA Intelligence 2025-3. Quarter, BTK.

** 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-Q3, 1 Euro = ₺47.621309.*

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 October 2024. As of September 2025, Turkcell's MoU was 431 minutes, Vodafone's MoU was 541 minutes and TT Mobil's MoU was 504 minutes.

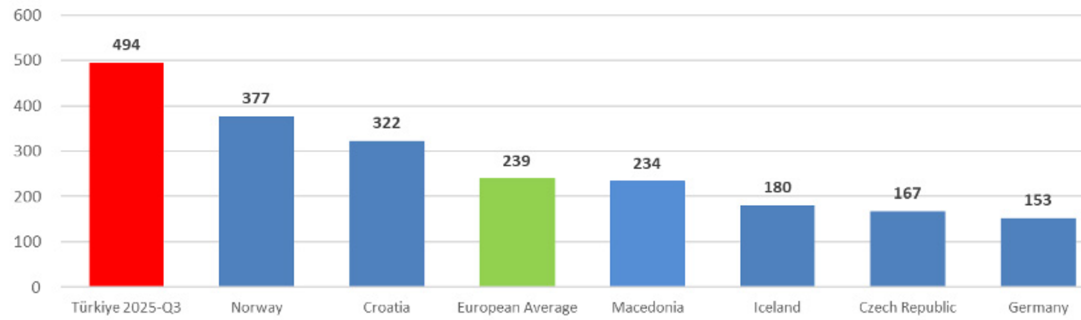
Figure 4-25 MoU Values by Mobile Operator, min/month *



"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 third quarter of 2025 Türkiye made the highest usage compared to the European countries with an average MoU of 494 minutes.

Figure 4-26 Average Calls per Mobile Subscriber in the EU and Türkiye, min/month *



Source: GSMA Intelligence 2025-3. Quarter, BTK[9].

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 4-27 Total Annual Mobile Investment, Million ₺

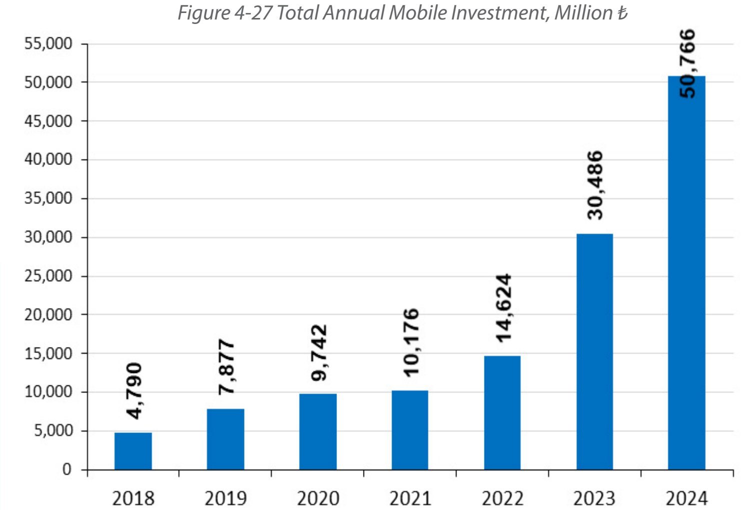
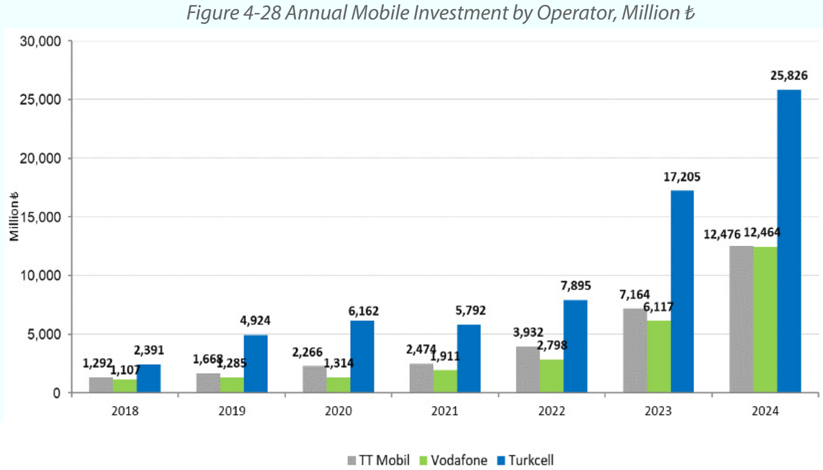


Figure 4-28 shows the annual investments of mobile operators seperately. In 2024, Vodafone invested ₺12,464 million, TT Mobil ₺12,476 million and Turkcell ₺25,826 million.

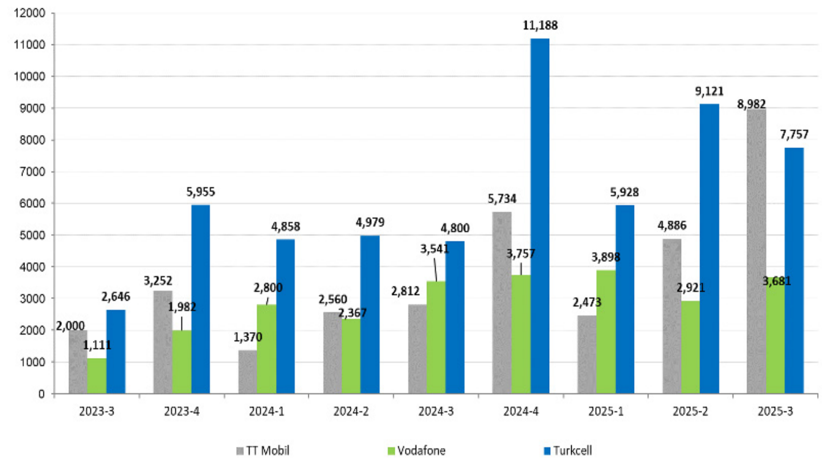
Figure 4-28 Annual Mobile Investment by Operator, Million ₺



9 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. TT Mobil invested ₺8,982 million, Turkcell ₺7,757 million and Vodafone ₺3,681 million in the third quarter of 2025.

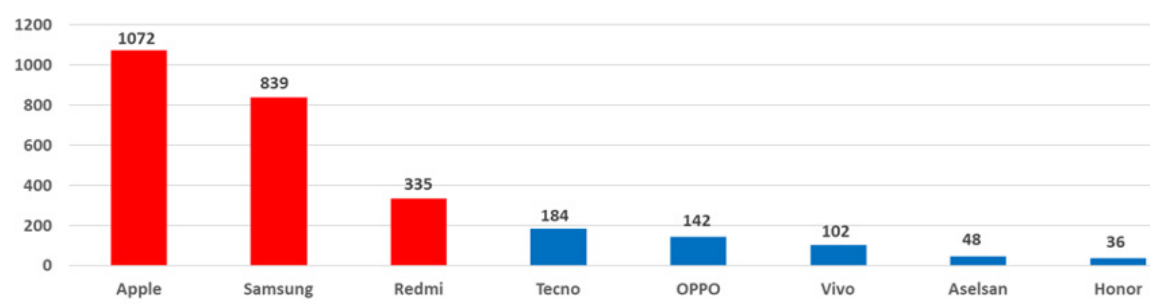
Figure 4-29 Quarterly Mobile Investment, Million ₺



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 third quarter of 2025.

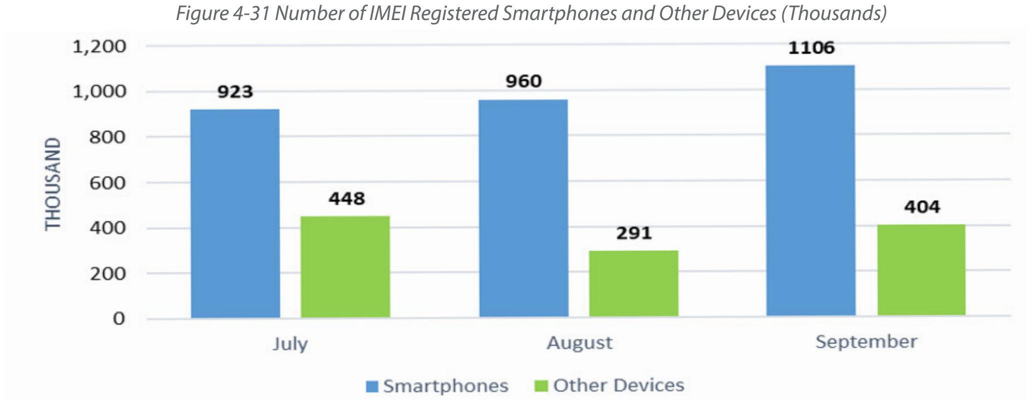
Figure 4-30 Number of IMEI Registered Mobile Devices by Brands (Thousand)



In the third quarter of 2025, more than 3.1 million mobile devices were registered, and approximately 72.4 % 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.

Figure 4-31 Number of IMEI Registered Smartphones and Other Devices (Thousands)



PART 5

OTHER SERVICES

5 OTHER SERVICES

5.1 INFRASTRUCTURE OPERATING SERVICE

As of the end of September, there are 192 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 third quarter of 2025, the total fiber length of the operators is approximately 657,000 km, of which 245,000 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
2022-3	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
2025-2	594,712	42,956	244,470	393,198	637,668
2025-3	613,709	43,340	245,367	411,682	657,049

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

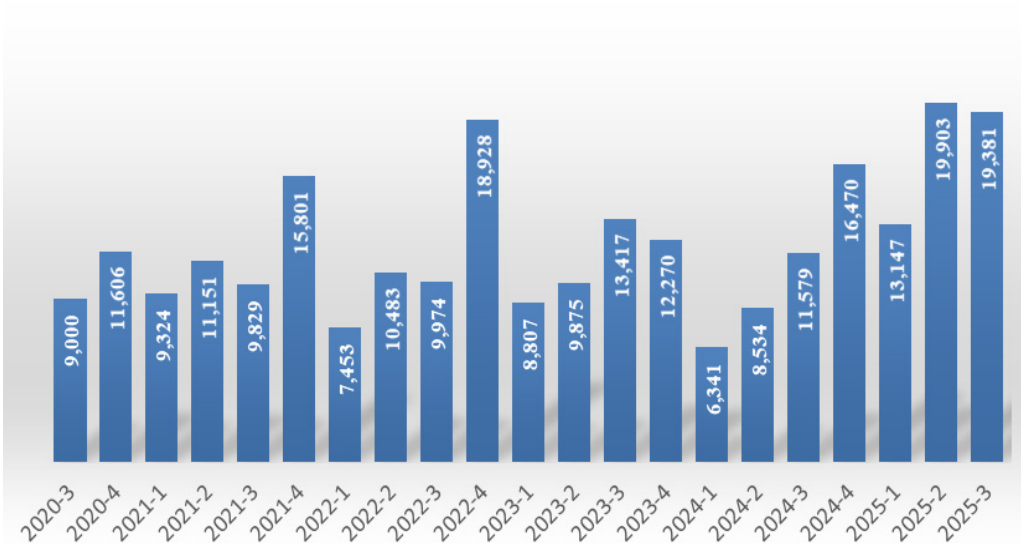


Table 5-2 presents the revenue data for the infrastructure operator group. In the third quarter of 2025, the total revenue generated by operators from infrastructure services amounted to 3,690 million TRY.

Table 5-2 Revenues from Alternative Infrastructure Operation Services

Period	Revenue, ₺
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
2025-2	3,358,176,363
2025-3	3,689,491,608

5.2 CABLE BROADCASTING SERVICES

As of Q3 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 1,535,742 cable TV subscribers as of the third quarter of 2025. Among the other authorized operators providing CBS, TTNet and Superonline offer IPTV services only to 1,158,278 and 1,425,202 subscribers respectively (Table 5-3).

Table 5-3 Cable Broadcasting Services

Period	Number of Cable TV Subscribers	Number of IPTV Subscribers
2024-2	1,465,735	2,486,500
2024-3	1,484,788	2,503,199
2024-4	1,499,846	2,522,781
2025-1	1,502,786	2,555,271
2025-2	1,501,492	2,559,553
2025-3	1,535,742	2,583,480

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 2.3% compared to the previous three-month period, reaching 1,535,742.

The trend of the number of IPTV subscribers is shown in Table 5-3, and the number of IPTV subscribers increased by approximately 0.93% compared to the previous three-month period, reaching 2,583,480.

5.3 SATELLITE COMMUNICATION SERVICES

Operators authorized to provide satellite communication services within the scope of the notification provide services to 16,425 subscribers via satellite ground stations as of the third 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 2,125 million ₺ for the third quarter of 2025.

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

Period	Number of Subscribers	Revenue, ₺
2024-3	16,184	945,466,194
2024-4	15,959	1,152,281,266
2025-1	15,508	1,107,037,507
2025-2	15,823	1,217,037,507
2025-3	16,465	2,124.982,805

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 40.9%, followed by Türksat with 35.1%, Superonline with 8.9%, ICT Telekom with 8.6% and İşNet with 5.2%, respectively.

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

Operator	2024-3	2024-4	2025-1	2025-2	2025-3
Eser Telekom	43.8	43.5	42.1	42.6	40.9
Türksat	36.3	36.5	37.1	36.3	35.1
Superonline	8.3	8.3	8.6	8.6	8.9
ICT Telekom	5.4	5.4	5.6	5.9	8.6
İşNet	5.0	5.1	5.3	5.4	5.2
Others	1.2	1.2	1.3	1.2	1.3

5.4 SATELLITE PLATFORM SERVICES

Of the operators authorized to provide satellite platform services, Digital Platform, Andromeda TV and TTNet 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

		2024-3	2024-4	2025-1	2025-2	2025-3
DİGİTAL PLATFORM	Number of Users	2,757,806	2,742,222	2,727,996	2,735,100	2,944,569
ANDROMEDA TV	Number of Users	882,903	845,698	816,577	791,448	766,423
TTNET AŞ	Number of Users	466,156	458,249	443,521	428,222	405,618

* *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, ₺

	2024-3	2024-4	2025-1	2025-2	2025-3
Total Revenues	221,665,121	216,349,761	256,757,741	230,171,573	263,580,107

5.5 GLOBAL MOBILE PERSONAL COMMUNICATIONS BY SATELLITE (GMPCS) SERVİCES

As of the third 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 third quarter of 2025, the total number of subscribers in this service group is 6,299, The revenue for GMPCS services was approximately 41,3 million ₺ during this period.

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

Period	Number of Subscribers	Revenue, ₺
2024-3	5,771	32,994,293
2024-4	5,979	49,949,835
2025-1	6,027	41,870,932
2025-2	6,003	53,312,005
2025-3	6,299	41,316,139

When we look at the market shares of operators operating in this field according to the number of subscribers; Teknomobil’s market share 39.9%, Aselnet's market share 28.5%, Icom's market share 22.8% and ClickNet's market share is 5.6% (Table 5-9).

Table 5-9 Market Shares of GMPCS Operators, %

Operator	2024-3	2024-4	2025-1	2025-2	2025-3
Teknomobil	51.5	47.4	45.2	42.9	39.9
Aselnet	16.8	21.7	22.7	24.1	28.5
Icom	22.1	21.6	22.7	23.8	22.8
ClickNet	6.1	6.1	6.0	5.9	5.6
Others	3.5	3.2	3.4	3.3	3.2

5.6 DIRECTORY ASSISTANCE SERVICES

As of Q3 2025 seven operators authorized to provide directory assistance services are actively operating. In the third quarter of 2025 the total number of calls made by these operators was 238,721 and the total call duration was 398,051 minutes.The quarterly revenue of directory assistance providers was approximately 31.4 million TRY (Table 5-10).

Table 5-10 Directory Assistance Services

Period	Number of Calls	Call Duration (Minutes)	Revenue (₺)
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
2025-2	244,772	406,526	29,149,239
2025-3	238,721	398,051	31,353,394

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 92.72% based on call numbers.

Table 5-11 Market Shares of Directory Assistance Operators

Operators	%	Average Call Duration (minutes)
BN Telekom (11880 - 11888)	92.72	1.6
Callturk (11858)	4.45	3.9
Mobilisim Iletisim (11877)	1.10	0.6
Pluss Telekom (11899)	0.88	0.5
118 Telekomunikasyon (11834)	0.80	0.7

5.7 PUBLIC ACCESS MOBILE RADIO (PAMR) SERVICES

As of the third 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 36, The number of subscribers, users and income information of PAMR operators are given in Table 5-12, the total number of subscribers is 2,740, the number of users is 126,064 and the income obtained from these services is approximately 76,1 million ₺.

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

Period	Number of Subscribers	Number of Users	Revenue, (₺)
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
2025-2	2,764	126,898	76,099,234
2025-3	2,740	126,064	76,108,805