# TÜRKİYE ELECTRONIC COMMUNICATION SECTOR

## Quarterly Market Data Report

2026 2nd QUARTER

# CONTENTS




**CONTENTS** 2
**LIST OF FIGURES** 4
**LIST OF TABLES** 6
**PREFACE** 7





**EXECUTIVE SUMMARY**
**2026-2. KEY FINDINGS** 9
General Market Data 10
Fixed Market 11
Broadband Market 12
Mobile Market 13
Other Services 15





**ABBREVIATIONS** 16

**1.GENERAL MARKET DATA** 17
1.1 NUMBER OF OPERATORS ACCORDING TO AUTHORIZATION AND SERVICE TYPES 18
1.2 OPERATORS' REVENUES 19
1.3 OPERATORS' INVESTMENTS 21
1.4 TOTAL TRAFFIC 22
1.5 CONSUMER COMPLAINTS 24





**2.FIXED TELEPHONY MARKET DATA** 26
2.1 CALL REVENUES FROM FIXED VOICES 28
2.2 TRAFFIC VOLUME IN FIXED TELEPHONY MARKET 30





**3.BROADBAND MARKET DATA** 34
3.1 NUMBER OF SUBSCRIBERS 35
3.2 PENETRATION RATES IN OECD COUNTRIES 37
3.3 USAGE AMOUNTS 38
3.4 DISTRIBUTION OF SUBSCRIBERS BY SPEED AND USAGE 39
3.5 DISTRIBUTION OF SUBSCRIBERS BASED ON TECHNOLOGY 40
3.6 INTERNET USAGE HABITS 41




**4.MOBILE MARKET DATA** **47**

4.1 NUMBER OF SUBSCRIBERS AND PENETRATION 48
4.2 MOBILE SUBSCRIBER PROFILE 52
4.3 MOBILE TRAFFIC VOLUME 54
4.4 SMS AND MMS 56
4.5 MOBILE REVENUES 56
4.6 AVERAGE REVENUE PER USER (ARPU) 59
4.7 MINUTES OF USE (MOU) 60
4.8 MOBILE INVESTMENT 61
4.9 MOBILE DEVICE REGISTRATION SYSTEM 62





**5.OTHER SERVICES** **63**

5.1 INFRASTRUCTURE OPERATING SERVICE 64
5.2 CABLE BROADCASTING SERVICES 66
5.3 SATELLITE COMMUNICATION SERVICES 66
5.4 SATELLITE PLATFORM SERVICES 67
5.5 GLOBAL MOBILE PERSONAL COMMUNICATIONS BY SATELLITE (GMPCS) SERVICES 68
5.6 DIRECTORY ASSISTANCE SERVICES 69
5.7 PUBLIC ACCESS MOBILE RADIO (PAMR) SERVICES 70

# LIST OF FIGURES


Figure 1-1 Total Annual Telephony Traffic Volumes, Billion Minutes ..... 22
Figure 1-2 Total Quarterly Call Traffic Volumes, Billion Minutes ..... 23
Figure 1-3 Traffic Distribution, Billion Minutes ..... 23
Figure 1-4 Traffic Distribution, % ..... 24
Figure 1-5 Number Of Consumer Complaints Per Million Subscribers (Units) ..... 25
Figure 2-1 Number Of Fixed Telephony Subscribers And Penetration Rate ..... 27
Figure 2-2 Türk Telekom Call Revenues, Million ₺ ..... 28
Figure 2-3 Market Shares Of Türk Telekom And Alternative Fixed Telephony Operators By Telephony Service Revenues (%) ..... 29
Figure 2-4 Comparison Of Call Origination (Local) Traffic (%) ..... 30
Figure 2-5 Comparison Of Call Origination Traffic (Long-Distance, %) ..... 30
Figure 2-6 Comparison Of Call Origınation Traffic (Mobile, %) ..... 31
Figure 2-7 Comparison Of Call Origination Traffic (International Outbound, %) ..... 31
Figure 2-8 Comparison Of International Call Traffic Terminated On Fixed Networks – % ..... 32
Figure 2-9 Comparison Of International Call Traffic Terminated On Mobile Networks – % ..... 32
Figure 2-10 Market Shares Of Fixed Telephony Operators And Türk Telekom In Total Fixed-Originated Traffic (%) ..... 33
Figure 3-1 Number Of Broadband Internet Subscribers ..... 35
Figure 3-2 Annual Growth Rates Of Fixed Broadband Penetration By Oecd Country ,% ..... 37
Figure 3-3 Average Monthly Usage Per Subscriber, Gbyte ..... 38
Figure 3-4 Distribution Of Fixed Broadband Internet Subscribers By Connection Speed, % ..... 39
Figure 3-5 Distribution Of Mobile Internet Subscribers (Via Computer) By Usage, % ..... 39
Figure 3-6 Distribution Of Mobile Internet Subscribers (Via Mobile Phone) By Usage, % ..... 40
Figure 3-7 Distribution Of Fixed Broadband Subscribers By Technology, % ..... 40
Figure 3-8 Rate Of Social Medıa And Messaging Application Usage (%) ..... 41
Figure 3-9 Internet Usage Rate (%) ..... 41
Figure 3-10 Top 20 Applications By Total Internet Traffic ..... 42
Figure 3-11 Applications Used In The Streaming Media Category ..... 42
Figure 3-12 Applications Used In The Instant Messaging Category ..... 43
Figure 3-13 Applications Used In The Voıp Category ..... 43
Figure 3-14 Applications Used In The Online Games Category ..... 44
Figure 3-15 Applications Used In The Network Storage Category ..... 44
Figure 3-16 Applications Used In The Web Browsing Category ..... 45
Figure 3-17 Applications Used In The Software Updates Category ..... 45
Figure 3-18 Applications Used In The P2p Category ..... 46
Figure 4-1 Total Number Of Mobile Subscribers And Penetration Rate ..... 48
Figure 4-2 Number Of Active 4.5g Mobıle Subscribers And Compatible Devices ..... 49
Figure 4-3 The Number Of Mobile Subscribers And Penetration Rate Based On Population Excluding Ages 0–9 ..... 49
Figure 4-4 Number Of Prepaid And Postpaid Mobile Broadband Subscribers, Thousands ..... 51
Figure 4-5 Mobile Penetration Rates Of Türkiye And Some European Countries, % ..... 51
Figure 4-6 Prepaid/Postpaid Subscription Rates In Some European Countries And Türkiye, % ..... 52
Figure 4-7 Total Number Of Subscribers By Mobile Operator, Million ..... 52
Figure 4-8 Total Number Of Mobile Number Portability Transactions ..... 53
Figure 4-9 Net Number Of Incoming Subscribers To Mobile Operators Via Mnp, Thousands ..... 53
Figure 4-10 Market Shares Of Mobile Operators By Number Of Subscribers (%) ..... 53
Figure 4-11 Subscriber Churn Rates Of Mobile Operators (%) ..... 54
Figure 4-12 Distribution Of Mobile Subscribers By Type (%) ..... 54
Figure 4-13 Total Traffic Of Mobile Operators By Quarter (Billion Minutes) ..... 55
Figure 4-14 Market Shares Of Mobile Operators By Traffic (%) ..... 55
Figure 4-15 Distribution Of Mobile Traffic (%) ..... 55
Figure 4-16 Sms And Mms Volumes By Perıod (Million Messages) ..... 56
Figure 4-17 Revenues From Mobile Services By Year, Billion ₺ ..... 56
Figure 4-18 Quarterly Revenues From Mobıle Services, Billion ₺* ..... 57
Figure 4-19 Market Share Of Mobile Operators By Total Revenue, % ..... 57
Figure 4-20 Market Shares Of Mobile Operators By Revenue From Subscribers, % * ..... 58

Figure 4-21 Distribution Of Mobile Operators' Revenue, %..... 58
Figure 4-22 Revenue Distribution Of Mobile Operators %..... 59
Figure 4-23 Mobile Arpu, ₺ ..... 59
Figure 4-24 Mobile Arpu İn Türkiye And Eu, €*..... 60
Figure 4-25 Mou Values By Mobile Operator, Min/Month *..... 60
Figure 4-26 Average Calls Per Mobile Subscriber In The Eu And Türkiye, Min/Month *..... 61
Figure 4-27 Total Annual Mobile Investment, Million ₺ ..... 61
Figure 4-28 Annual Mobile Investment By Operator, Million ₺..... 61
Figure 4-29 Quarterly Mobile Investment, Million ₺..... 62
Figure 4-30 Number Of Imei Registered Mobile Devices By Brands (Thousand) ..... 62
Figure 4-31 Number Of Imeı Registered Smartphones And Other Devices (Thousands)..... 62
Figure 5-1 Quarterly Increase In Fiber Lengths Of Operators Compared To The Previous Period, Km ..... 65

# LIST OF TABLES


Table 1-1 Number Of Authorızations By Service Types ..... 18
Table 1-2 Annual Net Sales Revenues Of Türk Telekom And Mobile Operators, ₺ ..... 19
Table 1-3 Quarterly Net Sales Revenues Of Türk Telekom And Mobile Operators, ₺ ..... 19
Table 1-4 Quarterly Revenues Of Other Operators, ₺ * ..... 20
Table 1-5 Annual Revenues Of Other Operators, ₺ * ..... 20
Table 1-6 Quarterly Investments Of Türk Telekom And Mobile Network Operators, ₺ ..... 21
Table 1-7 Total Annual Investment Of Türk Telekom And Mobile Operators, ₺ * ..... 21
Table 1-8 Quarterly Investment Of Other Operators, ₺ * ..... 21
Table 1-9 Total Annual Investment Of Other Operators, ₺ * ..... 22
Table 1-10 Quarterly Number Of Consumer Complaınts By Sector ..... 24
Table 1-11 Distribution Of Consumer Complaints By Subject ..... 25
Table 2-1 Market Shares Of Alternative Fixed Telephony Operators By Number Of Subscriber ..... 27
Table 2-2 Market Shares Of Alternative Fixed Telephony Operators By Net Sales Revenue ..... 28
Table 2-3 Net Sales Revenues Of Alternative Fixed Oice Operators (₺) ..... 29
Table 3-1 Total Number Of Internet Subscribers ..... 36
Table 3-2 Annual Fixed Broadband Servıce Revenues, ₺ ..... 37
Table 3-3 Periodic Fixed Broadband Service Revenues, ₺ ..... 37
Table 4-1 3G And 4.5G Service User Data* ..... 50
Table 5-1 Fiber Lengths Of Operators, Km ..... 64
Table 5-2 Revenues From Alternative Infrastructure Operation Services ..... 65
Table 5-3 Cable Broadcasting Services ..... 66
Table 5-4 Number Of Subscribers And Revenue Related To Satellite Communication Services ..... 66
Table 5-5 Market Shares Of Satellite Communicatıon Service Operators According To The Number Of Subscribers, % ..... 67
Table 5-6 Number Of Users Of Satellite Platform Service ..... 67
Table 5-7 Satellite Platform Service Revenues, ₺ ..... 67
Table 5-8 Number Of Subscribers And Revenues For Gmpcs Service ..... 68
Table 5-9 Market Shares Of Gmpcs Operators, % ..... 68
Table 5-10 Directory Assıstance Services ..... 69
Table 5-11 Market Shares Of Directory Assistance Operators ..... 69
Table 5-12 Number Of Subscribers, Users And Revenues Of Pamr Services ..... 70




# PREFACE

The fundamental requirement for making emerging technologies usable is electronic communications infrastructures capable of securely carrying the high data traffic generated by these technologies and delivering it to end users. While download speeds were considered more important in the past, developments today indicate that this situation may change. The recent launch of 5G mobile services by our operators and the expansion of fiber-based terrestrial infrastructures are becoming even more important in these respects.

This report, which includes data from the electronic communications sector in the second quarter of 2026, is summarized as follows:

- The total net sales revenues of the operators in the sector were approximately ₺199.7 billion in the second quarter of 2026.
- During the second quarter of 2026, the number of fixed telephony subscribers was 8.13 million and the number of actual mobile users was approximately 87 million. While the mobile penetration rate was 101%, when we exclude the number of machine-to-machine communication (M2M) subscribers and the population aged 0-9, the mobile penetration rate is 115.9%. In the second quarter of 2026, Türkiye ranked first among the European countries that could be examined, as in the previous period, with an average monthly mobile usage time of 468 minutes. During this period, approximately 2.8 million mobile subscribers ported their numbers, and the total number of mobile numbers ported until June 30, 2026 was approximately 214.1 million.

- When broadband data is examined, a total of 100.8 million broadband internet subscribers have been reached, 21.2 million of which are fixed subscribers and 79.7 million are mobile subscribers, and the number of internet subscribers has increased by 3.6% 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 26.4%, followed by the number of "Fiber (Total)" subscribers with a rate of 22%. The average monthly data usage of fixed broadband subscribers in this quarter was 324.7 GBytes.
- The number of subscribers to the 5G service, which became available in our country on April 1, 2026, reached 44.5 million at the end of June 2026. However, due to some citizens' devices or SIM cards not being compatible with 5G services, the number of users who were able to actively use this service was 26.1 million. The average monthly usage of mobile broadband internet subscribers was 23.3 GByte.
- Length of fiber infrastructure, which was approximately 637,000 km in the same period of the previous year, is approximately 720,000 km in the second quarter of 2026, an increase of 13%.

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

**Mehmet KOÇYİĞİT**
Chairman of the Board

BİLGİ
TEKNOLOJİLERİ
VE İLETİŞİM
KURUMU

# EXECUTIVE SUMMARY

# 2026-2. KEY FINDINGS

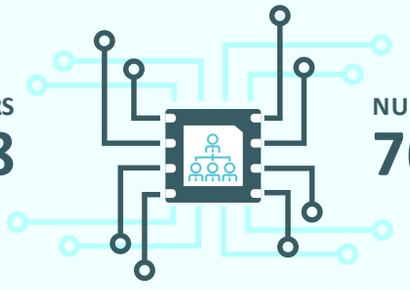
The developments in the Turkish electronic communications market as of the end of the second quarter (April-May-June) of 2026 are summarized below. [1]

---

*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 Q2 of 2026, the number of operators in the electronic communications sector was **418** and the number of authorizations granted to these operators was **766**



NUMBER OF OPERATORS
**418**

NUMBER OF AUTHORIZATIONS
**766**

In Q2 of 2026, the total net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were **₺150.5 billion**, while the total net sales revenues of other

operators in the same period were **₺49.2 billion.**






In Q2 of 2026, the total investment amount of TT Mobil, Turkcell, Türk Telekom and Vodafone was **₺44.3 billion**,

while other operators invested approximately **₺11.3 billion** in the same period.

In Q2 of 2026, the total amount of mobile traffic was **77.4 billion minutes**, while the amount of fixed traffic was approximately **1.3 billion minutes**. Compared to the previous quarter, the amount of mobile traffic increased by **7.8 %** and the amount of fixed traffic decreased by **1.5 %**. The majority of the traffic **(95.5%)** was mobile to mobile.



In Q2 of 2026, a total of **79,586** complaints were received by BTK from consumers, and approximately **51.6%** 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

- Turk Telekom's fixed telephony revenues reached approximately ₺3,304billion, representing an increase of **27.5%** compared to the same period of the previous year, and a 0.05% decrease compared to the previous quarter
- Approximately **5.3 million** subscribers received fixed-line services from alternative operators, with these operators generating around **₺3.81 billion** in revenues from all fixed telephony services in Q2 2026.
- In local call traffic, alternative fixed-line operators held a 28.6% share, while Türk Telekom accounted for **71.4%.**
- For long-distance call traffic, alternative fixed-line operators had a market share of **90.1%**, while Türk Telekom's share was **9.9%**.
- In call traffic directed to mobile networks, alternative fixed-line operators accounted for **72.7%**, while Türk Telekom held **27.3%**.



- For outbound international call traffic, Türk Telekom's market share was **71.5%**, whereas alternative fixed-line operators' share was **28.5%**.
- In international call traffic terminated on fixed networks, Türk Telekom's share was **27.6%**, while alternative fixed-line operators held **72.4%**.
- In international call traffic terminated on mobile networks, alternative fixed-line operators' share was **82.1%**, while Türk Telekom's share was **17.9%**.

# Broadband Market

- Broadband internet subscribers, which were around **6 million** in **2008**, exceeded **100.8 million** as of the second quarter of **2026**.
- In the second quarter of **2026**, total internet subscriptions increased by **1.3% compared** to the previous **three-month period**, and by **3.6% year-on-year.**
- In the second quarter of 2026, the number of xDSL subscribers was approximately **8 million**, while the number of fiber subscribers reached **10.70 million**.
- The number of cable internet subscribers decreased by **1.1% compared** to the previous three-month period, reaching **1.50 million.**
- Total revenue for internet service providers reached **36.6 billion TL** in the second quarter of 2026.
- In the second quarter of 2026, the average monthly usage of fixed broadband internet subscribers was **324.7 GByte**, while the average monthly usage of mobile broadband internet subscribers was **23.3 GByte.**



# Mobile Market



- As of the end of June 2026, there were a total of 86,989,303 real mobile users in Türkiye, excluding machine-to-machine (M2M) subscribers, corresponding to a mobile penetration rate of approximately 101%. Excluding machine-to-machine (M2M) subscribers and the population aged 0–9, the mobile penetration rate was 115.9%. [2]
- In the second quarter of 2026, the number of 3G real users was 1,995,710 the number of 4.5G real users was 40,451,151, while the number of 5G real users reached 44,268,946. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with 3G, 4.5G and 5G services was 79,657,065. The total amount of mobile internet usage in the second quarter of 2026 was 5,578,135 TBytes.
- As of the second quarter of 2026, the number of M2M subscribers was approximately 15.2 million.
- As of the second quarter of 2026, the number of prepaid mobile broadband subscribers was 11,595,589 and the number of postpaid mobile broadband subscribers was 66,523,194.
- In the second quarter of 2026, the number of mobile number portability transactions decreased by 19.6% compared to the previous three-month period and was 2,782,985. A total of 214,078,593 number portability transactions were carried out until June 30, 2026.
- As of the second quarter of 2026, Turkcell holds a market share of 39.1%, Vodafone 28.8% and TT Mobil 32% in terms of subscriber numbers.
- Approximately 77.7% of total mobile subscribers are individual subscribers and 22.3% are corporate subscribers.
- Total mobile traffic volume in the second quarter of 2026 was 77.4 billion minutes. When traffic information for the second quarter of 2026 is compared to the previous three-month period, it is seen that total mobile traffic increased by 7.9%, while it declined by 3.7% compared with the same period of the previous year.
- When examined on an operator basis, it is seen that Turkcell's traffic volume increased by 8.4%, TT Mobil's traffic volume increased by 8.3%, and Vodafone's traffic volume increased by 7% compared to the previous period.

2 *As of 31 December 2025, the population of Türkiye was 86,092,168, according to the Turkish Statistical Institute (TurkStat).*

- In the second quarter of 2026, it is seen that the total number of SMS was approximately 5.3 billion and the number of MMS was approximately 16.1 million.
- When market shares by revenue are examined as of the second quarter of 2026, it is seen that Turkcell's market share is 41.1%, Vodafone's market share is 34.7% and TT Mobil's market share is 24.2%.
- When market shares by revenue in the second quarter of 2026 are compared with the previous period, it is seen that TT Mobil's market share by revenue decreased by 0.2, Vodafone's market share decreased by 0.7, while Turkcell's market share increased by 0.9 percentage points.
- According to the revenue obtained from subscribers as of the second quarter of 2026, Turkcell's market share is 42.5%, while Vodafone and TT Mobil's market shares are 31% and 26.5%, respectively.
- Call revenues constitute 6.9% of TT Mobil's revenues, 8.5% of Vodafone's revenues, and 6.2% of Turkcell's revenues. SMS and MMS revenues constitute 30.1% of TT Mobil's revenues, 5.5% of Vodafone's revenues, and 2.3% of Turkcell's revenues. Data revenues have a share of 59.7% in TT Mobil, 85.5% in Vodafone, and 90.7% in Turkcell.
- As of the second quarter of 2026, the monthly revenue per subscriber is ₺368.5 for Turkcell, ₺364.4 for Vodafone, and ₺280.4 for TT Mobil.
- As of June 2026, Turkcell's MoU value is 427 minutes, Vodafone's is 541 minutes, and TT Mobil's is 496 minutes.
- Türkiye has become the country that makes the most calls on mobile phones compared to the European countries in the second quarter of 2026, with an average monthly mobile usage time of 468 minutes.



# Other Services

As of the second quarter of 2026, the total fiber length of the operators is 720,000 km. Of this, 252,000 km is used for backbone purposes, and the remainder for access purposes. The total revenue generated by alternative infrastructure operators in the second quarter of 2026 is approximately 5,197 million TL.

As of the second quarter of 2026, the total number of subscribers to GMPCS Services was 6,199 and the revenue generated from GMPCS services was ₺45.2 million.

In Q2 2026, Turksat's total cable TV subscriber number reached to 1,570,616. The number of IPTV service subscribers offered by TTNet and Superonline are 1,236,883 and 1,429,925 respectively.

Within the scope of directory services, the total number of calls in Q2 2026 was 175,097, with a cumulative call duration of 300,429 minutes. The quarterly revenue generated by directory service providers amounted to approximately 32 million TRY.

As of the end of the second quarter of 2026, operators authorized to provide Satellite Communication Services served 14,699 subscribers and the total revenue generated from this service during the same period was approximately ₺1,855 million.

During this period, the total number of subscribers of operators offering Public Access Mobile Radio (PAMR) Services was 2,707 and the number of users was 125,681. The revenue from these services in the second quarter of 2026 was ₺97.5 million

The total number of users of Satellite Platform Services reached approximately 4,0 million as of the second quarter of 2026. The total revenue from this service was approximately ₺400.7 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 second quarter (April-May-June) of 2026 are analyzed in comparison with the previous periods.

## 1.1 NUMBER OF OPERATORS ACCORDING TO AUTHORIZATION AND SERVICE TYPES

As of June 30, 2026, the number of operators operating in the electronic communications sector is 418 and the number of authorizations granted to these operators is 766. 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 | 7 |
| | Infrastructure Operation Service | 206 |
| | Internet Service Providers | 320 |
| | Cable TV Service | 13 |
| | GMPCS | 6 |
| | GSM 1800 Mobile Phone Service on Aviation | 2 |
| | Mobile Virtual Network Operator Service | 11 |
| **Service Providers under Right of Use** | IMT Service | 3 |
| | Mobile Electronic Communications Service | 3 |
| | GMPCS Mobile Telephony Service | 2 |
| | PMR/PAMR Service | 33 |
| | Infrastructure Operating Service | 14 |
| | Fixed Telephone Service | 98 |
| | Directory Assistance Services | 8 |
| | Mobile Virtual Network Operator Service | 8 |
| **TOTAL** | | **766** |

## 1.2 OPERATORS' REVENUES

The annual net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone since 2020 are given in Tables 1-2. In 2025, total net sales revenues exceeded ₺476.4 billion, with an increase of 50% compared to the previous year.

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

| Net Sales (₺) | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| TT Mobil | 9,873,044,574 | 11,465,795,689 | 16,360,278,627 | 30,290,242,704 | 58,830,648,231 | 89,471,865,806 |
| Turkcell | 17,970,014,752 | 20,852,544,558 | 30,071,240,620 | 55,116,671,491 | 108,114,849,038 | 152,119,296,226 |
| Türk Telekom | 14,576,197,872 | 17,066,805,703 | 22,061,735,471 | 35,894,868,968 | 61,426,295,751 | 104,703,441,774 |
| Vodafone | 15,133,092,255 | 17,835,967,775 | 26,727,065,567 | 49,689,927,732 | 89,277,262,807 | 130,144,479,327 |
| **TOTAL** | **57,552,349,454** | **67,221,113,725** | **95,220,320,285** | **170,991,710,895** | **317,649,055,827** | **476,439,083,134** |

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 Q2 of 2026, the net sales revenues of TT Mobil, Turkcell, Türk Telekom and Vodafone were ₺150.5 billion in total.

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

| | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| TT Mobil | 21,731,261,829 | 24,008,555,542 | 24,114,453,483 | 25,387,920,448 | 28,001,530,988 |
| Turkcell | 36,172,030,772 | 44,788,503,904 | 39,542,798,683 | 41,921,197,328 | 47,507,116,037 |
| Türk Telekom | 20,547,462,220 | 28,956,507,865 | 36,413,147,212 | 30,539,951,695 | 34,889,408,565 |
| Vodafone | 31,290,715,358 | 35,261,977,865 | 35,662,500,299 | 36,866,578,408 | 40,130,314,870 |
| **TOTAL** | **109,741,470,179** | **133,015,545,176** | **135,732,899,676** | **134,715,647,878** | **150,528,370,460** |

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 ₺49.2 billion in Q2 of 2026.

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

| Authorization Type | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| ISP | 23,616,740,231 | 28,774,264,523 | 32,051,317,257 | 33,475,278,067 | 36,556,977,839 |
| FTS | 2,329,416,004 | 2,051,423,651 | 3.114,704,666 | 2,967,480,201 | 3,807,022,640 |
| Infrastructure | 3,358,176,363 | 3,689,491,608 | 4,897,210,496 | 4,953,677,743 | 5,197,011,054 |
| Satellite Communi-cations | 1,217,023,111 | 2,124,982,805 | 2,620,647,676 | 1,898,703,297 | 1,855,013,324 |
| Directory Assistance | 29,149,239 | 31,353,394 | 42,053,722 | 44,960,557 | 31,767,671 |
| Cable TV | 1,274,842,825 | 1,366,559,233 | 1,479,281,124 | 1,534,267,618 | 1,622,097,661 |
| GMPCS | 53,312,005 | 41,316,139 | 45,263,224 | 42,914,355 | 45,210,279 |
| PMR/PAMR | 76,099,234 | 76,108,805 | 95,163,438 | 86,457,110 | 97,534,895 |
| **TOTAL** | **31,954,759,012** | **38,155,500,158** | **44,345,641,603** | **45,003,738,948** | **49,212,635,363** |

** 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 2020 and 2025.

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

| Authorization Type | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| ISP | 12,111,887,498 | 15,208,840,554 | 21,463,001,302 | 34,563,506,139 | 63,353,088,238 | 105,593,891,659 |
| FTS | 2,174,904,731 | 2,590,269,260 | 3,920,527,816 | 5,633,522,862 | 8,041,732,679 | 10,251,627,278 |
| Infrastructure | 3,199,448,389 | 4,417,611,951 | 5,710,342,129 | 7,037,826,920 | 10,095,746,818 | 14.919.064.239 |
| Satellite Communications | 658,831,280 | 734,722,869 | 1,409,921,878 | 2,752,102,254 | 3,774,803,706 | 7,069,691,099 |
| Directory Assistance | 35,265,916 | 32,628,686 | 35,990,891 | 63,285,885 | 88,604,832 | 128,281,932 |
| Cable TV | 1,251,496,703 | 2,125,536,697 | 2,374,097,589 | 3,233,851,339 | 4,031,625,463 | 5,283,449,648 |
| GMPCS | 24,308,019 | 29,521,547 | 58,730,148 | 102,226,961 | 149,746,598 | 181,762,300 |
| PMR/PAMR | 79,517,111 | 95,008,078 | 116,658,002 | 179,174,510 | 275,047,304 | 337,684,924 |
| **TOTAL** | **19,535,659,649** | **25,234,139,641** | **35,089,269,755** | **53,565,496,871** | **89,810,395,639** | **143,765,453,080** |

** 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 2020 and 2025. In Q2 of 2026, total investment of TT Mobil, Turkcell, Türk Telekom and Vodafone was around ₺44.3 billion.

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

| | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| **TT Mobil** | 4,886,065,477 | 8,981,865,084 | 9,817,404,695 | 57,249,975,012 | 7,407,620,177 |
| **Turkcell** | 9,120,809,836 | 7,757,437,610 | 17,454,954,169 | 65,513,143,552 | 17,015,608,366 |
| **Türk Telekom** | 6,272,493,870 | 10,392,666,182 | 17,835,094,239 | 96,535,616,781 | 14,243,130,869 |
| **Vodafone** | 2,920,990,273 | 3,681,160,806 | 5,005,132,109 | 35,737,101,970 | 5,676,514,360 |
| **TOTAL** | **23,200,359,455** | **30,813,129,682** | **50,112,585,213** | **255,035,837,315** | **44,342,873,772** |

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

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| **TT Mobil** | 2,265,801,468 | 2,474,002,218 | 3,931,720,163 | 7,164,169,837 | 12,475,585,760 | 26,158,752,146 |
| **Turkcell** | 6,162,326,026 | 5,791,624,753 | 7,895,189,534 | 17,204,981,041 | 25,826,094,827 | 40,261,119,409 |
| **Türk Telekom** | 3,286,575,362 | 4,808,048,542 | 7,628,594,767 | 10,705,189,640 | 18,320,504,135 | 37,935,344,692 |
| **Vodafone** | 1,313,856,069 | 1,910,714,976 | 2,797,515,312 | 6,116,895,859 | 12,464,274,892 | 15,505,694,526 |
| **TOTAL** | **13,028,558,925** | **14,984,390,489** | **22,253,019,776** | **41,191,236,377** | **69,086,459,615** | **119,860,910,772** |

Table 1-8 provides quarterly investments of other operators in the market. Accordingly, approximately ₺11.3 billion was invested by other operators in Q2 of 2026.

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

| | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| **Other Operators** | 6,556,399,940 | 6,456,392,045 | 9,086,741,910 | 7,927,935,095 | 11,273,684,703 |

* *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 2020 and 2025 are given in Table 1-9.

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

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| **Other Operators** | 3,654,475,964 | 6,805,857,759 | 8,836,728,456 | 11,218,705,551 | 24,994,959,059 | 25,141,567,469 |

* *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 2025, the total amount of traffic decreased by 1.7% compared to the previous year and reached 317.5 billion minutes. Mobile traffic accounted for approximately 98.4% of this traffic.

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

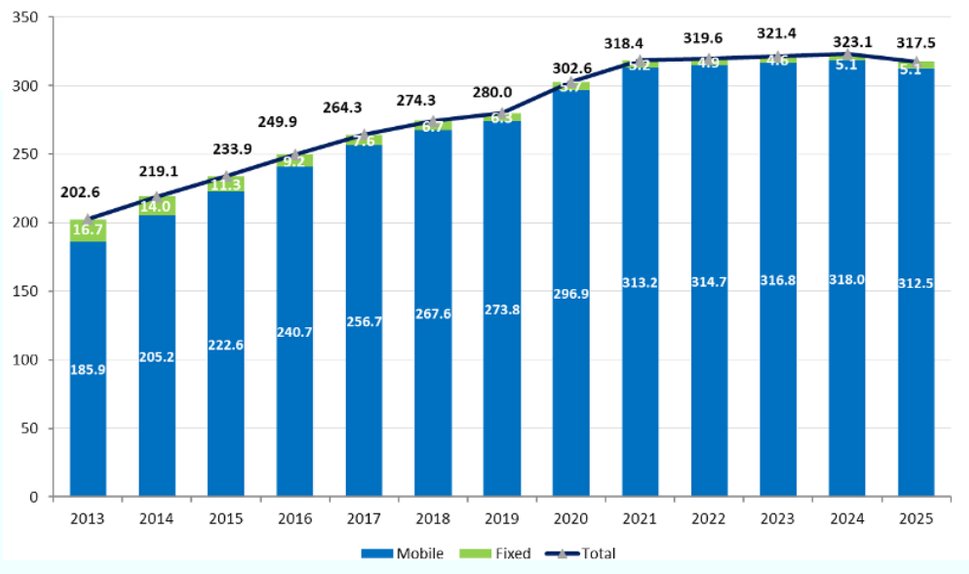
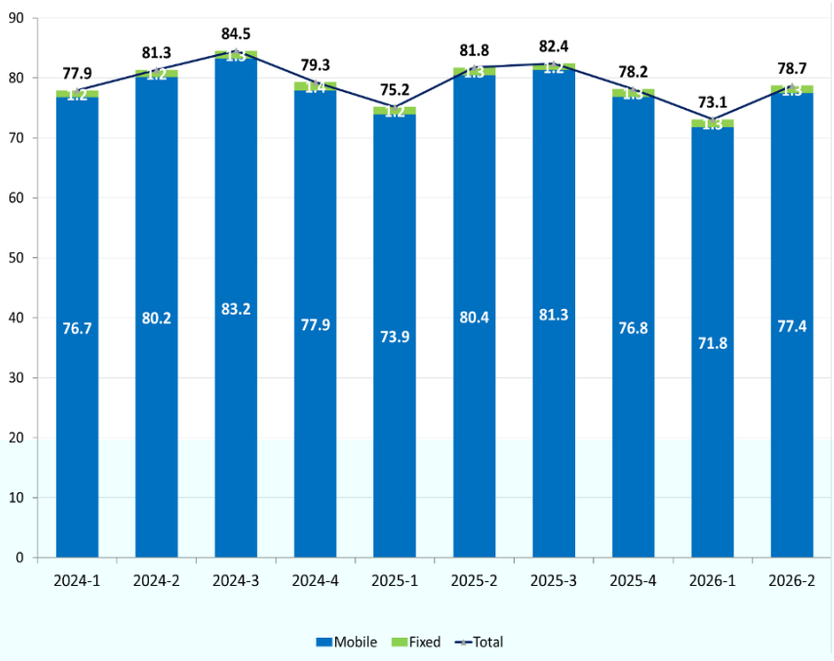


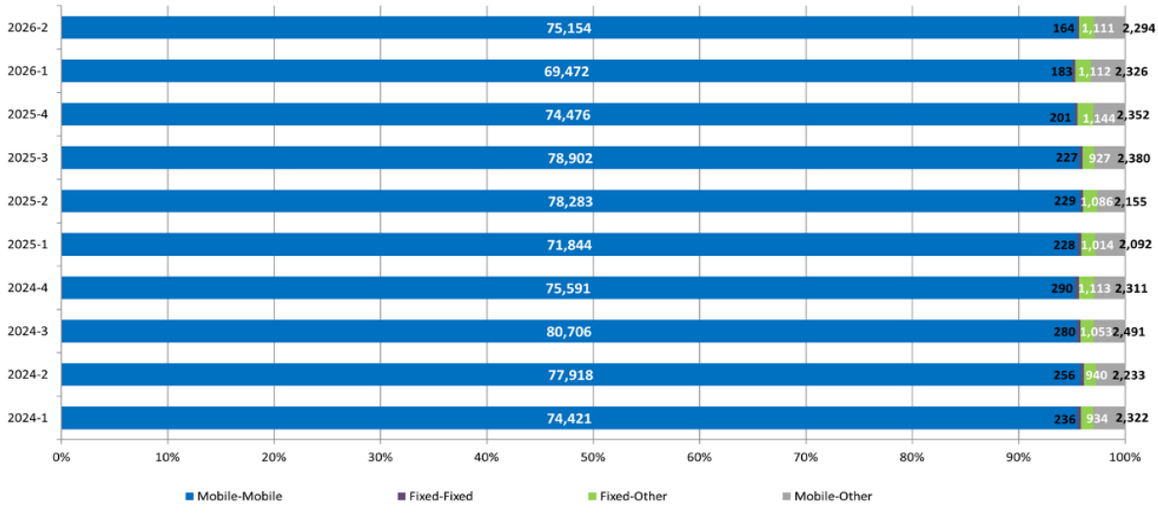

Figure 1-2 shows the total fixed and mobile traffic in Türkiye on a quarterly basis starting from the Q1 of 2024. In Q2 of 2026, the total mobile traffic was approximately 77.4 billion minutes, while the fixed traffic was 1.3 billion minutes.

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



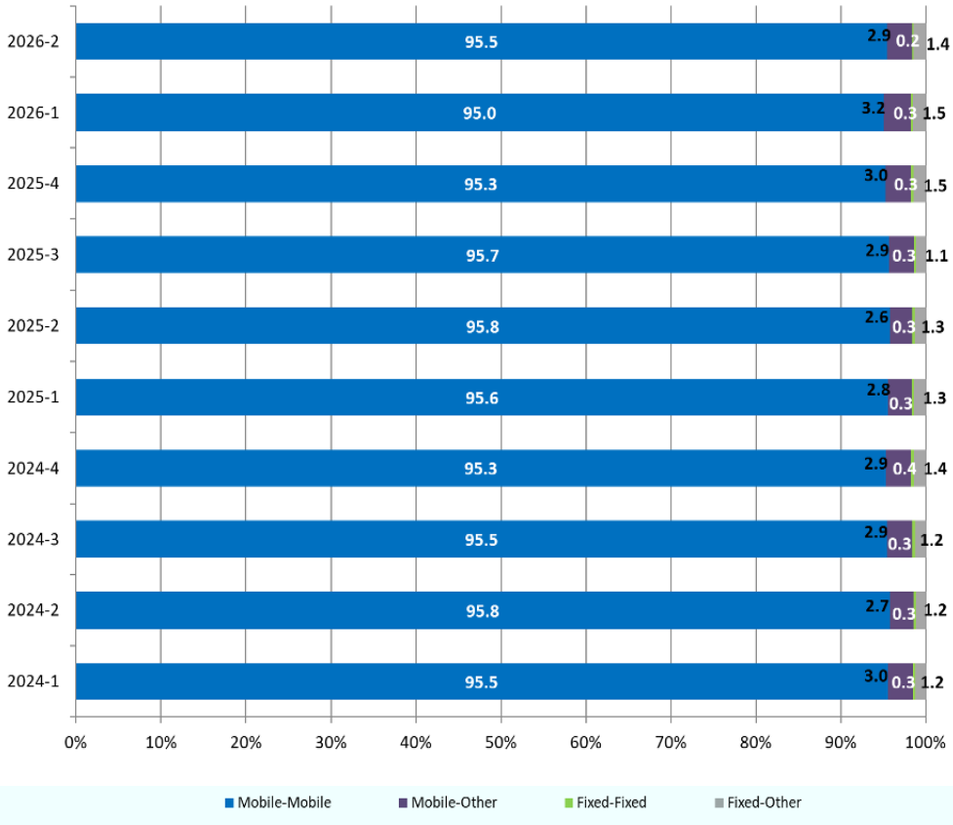

The distribution of traffic generated by fixed and mobile operators in the Turkish electronic communications sector by direction is compared in quarterly as follows.

*Figure 1-3 Traffic Distribution, Billion Minutes*




In the second quarter of the year, the majority of the total traffic (95.5%) 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 Q2 of 2026, 79,586 complaints were submitted to the BTK.

*Table 1-10 Quarterly Number of Consumer Complaints by Sector*

| | 2024-4 | 2025-1 | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|---|---|
| **Mobile** | 21,064 | 19,087 | 30,153 | 35,999 | 34,368 | 34,624 | 32,340 |
| **ISP** | 25,065 | 22,007 | 22,700 | 38,005 | 41,516 | 43,500 | 41,046 |
| **Satellite Platform** | 2,521 | 1,947 | 1,752 | 4,209 | 3,534 | 2,973 | 2,674 |
| **Fixed Telephone** | 1,982 | 1,798 | 2,565 | 3,205 | 3,243 | 3,295 | 2,826 |
| **Cable TV** | 422 | 372 | 331 | 655 | 648 | 755 | 700 |
| **TOTAL** | **51,054** | **45,211** | **57,501** | **82,073** | **83,309** | **85,147** | **79,586** |

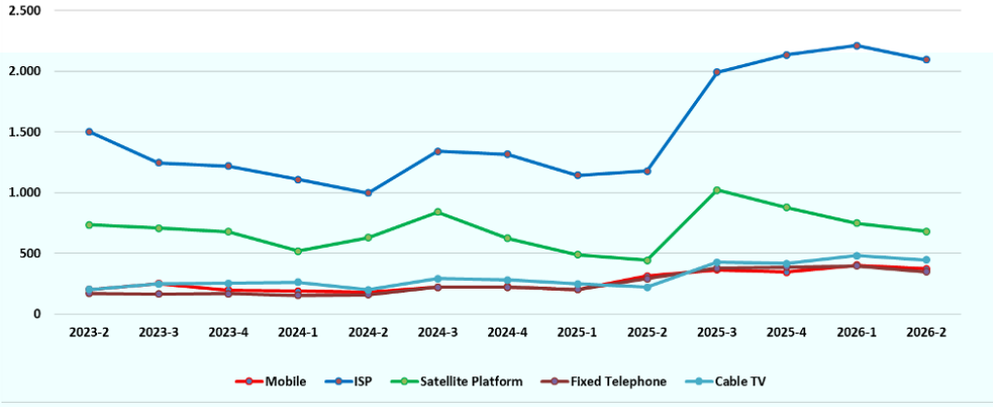
The percentage distribution of the most common complaint topics among the complaints received by services is given in the table below.

*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→%20.25 |
| **Internet Service Provider Service** | Connection/Service Quality→ %48.45 |
| **Satellite Platform Service** | Billing→ %25.17 |
| **Fixed Telephone Service** | Subscription Transactions → %35.07 |
| **Cable TV Service** | Connection/Service Quality→ %35.86 |

Figure 1-5 shows the number of consumer complaints per million subscribers on a service basis. As of the Q2 2026, an average number of consumer complaints per million subscribers was 2,094 for ISPs, 679 for satellite platform service providers, 446 for Cable TV service providers,372 for fixed telephony service providers and 348 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 Q2 2026, Türkiye had 8,126,661 fixed telephony subscribers with a penetration rate of approximately 9.4% (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.

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

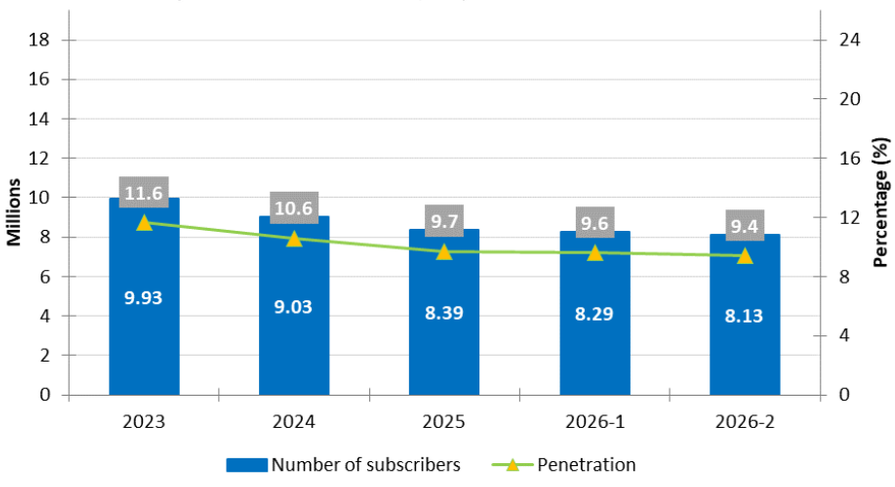



Table 2-1 presents the market shares of alternative fixed telephony operators in terms of subscriber numbers. According to the data, the top three operators are TTNet, Turksat, and NetGSM.

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

| Operator | Market Share (%) |
|---|---|
| **TTNet** | 70.8 |
| **Turksat** | 4.9 |
| **NetGsm** | 3.1 |
| **Voip Telekom** | 2.8 |
| **Is Net** | 2.7 |
| **Turk Net** | 2.0 |
| **VodafoneNet** | 1.5 |
| **Superonline** | 1.4 |
| **Others** | 10.8 |

In Q2 2026, 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 Q2 2026 were Superonline, VodafoneNet and TTNet respectively.

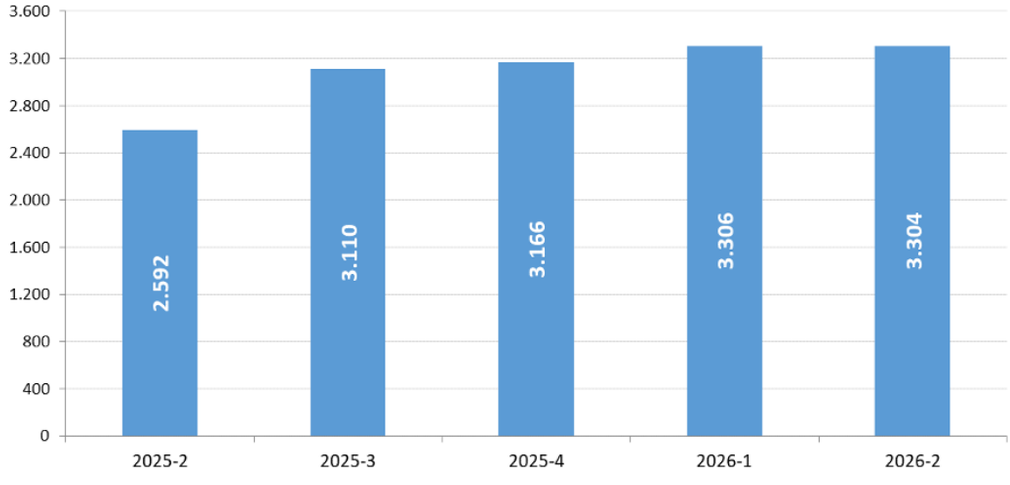
*Table 2 -2 Market Shares of Alternative Fixed Telephony Operators by Net Sales Revenue*

| Operator | Market Share (%) |
|---|---|
| **Superonline** | 48.1 |
| **VodafoneNet** | 23.5 |
| **TTNet** | 9.8 |
| **Compatel Telekom** | 1.9 |
| **Netgsm İletişim** | 1.8 |
| **Eser Telekom** | 1.6 |
| **Is Net** | 1.3 |
| **Posta Guvercini** | 1.2 |
| **Others** | 12 |

## 2.1 CALL REVENUES FROM FIXED VOICES

In Q2 2026, Turk Telekom's fixed telephony revenues reached approximately ₺3,304billion, representing an increase of 27.5% compared to the same period of the previous year, and a 0.05% decrease compared to the previous quarter (Figure 2-2).

*Figure 2-2 Turk Telekom Call Revenues, Million ₺*




*Calculated based on gross sales.*

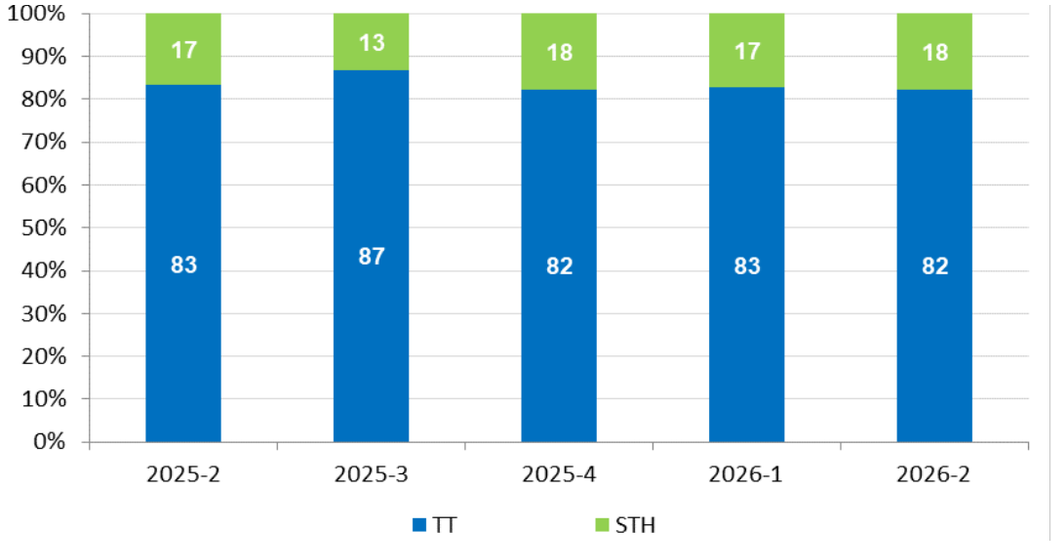
Table 2-3 presents the total net sales revenues of alternative fixed telephony operators starting from Q2 2025. Approximately 5.3 million subscribers received fixed telephony services from alternative operators. For Q2 2026, the total revenue generated by these operators from all fixed telephony services amounted to approximately ₺3,807 billion.

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

| Quarter | Net Sales Revenue (₺) |
|---|---|
| **2025-2** | 2,329,416,004 |
| **2025-3** | 2,051,423,651 |
| **2025-4** | 3,114,704,666 |
| **2026-1** | 2,967,480,201 |
| **2026-2** | 3,807,022,640 |

Figure 2-3 illustrates the market shares of alternative fixed telephony operators and Turk Telekom based on their revenues from telephone services. In Q2 2026 the market shares of alternative fixed telephony operators and Turk Telekom were 18% and 82%, 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 2-7 compares the shares of STH operators and Türk Telekom in domestic call traffic beginning from the second quarter of 2025. As of the second quarter of 2026, STH operators accounted for 71.4% of the total domestic traffic, whereas Türk Telekom held a market share of 28.6%.

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

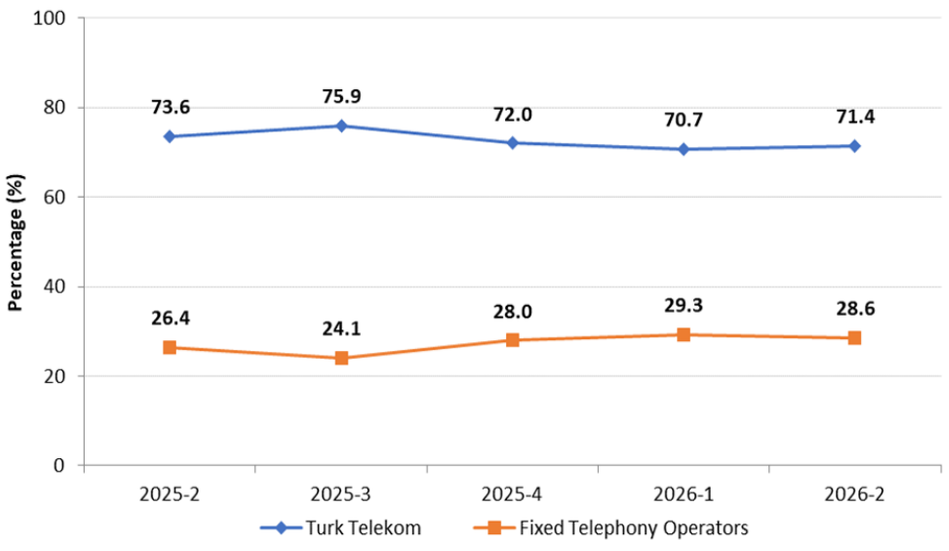



Figure 2-5 compares the shares of alternative fixed telephony operators and Turk Telekom in long-distance traffic starting from the Q2 2025. Accordingly, in Q2 2026, operators held a market share of 90.1% in long-distance traffic, while Turk Telekom's share was 9.9%.

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

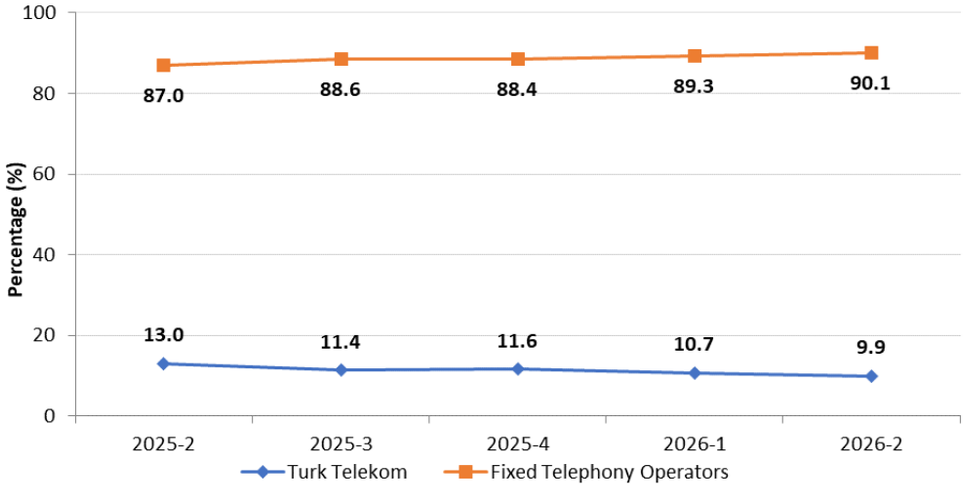
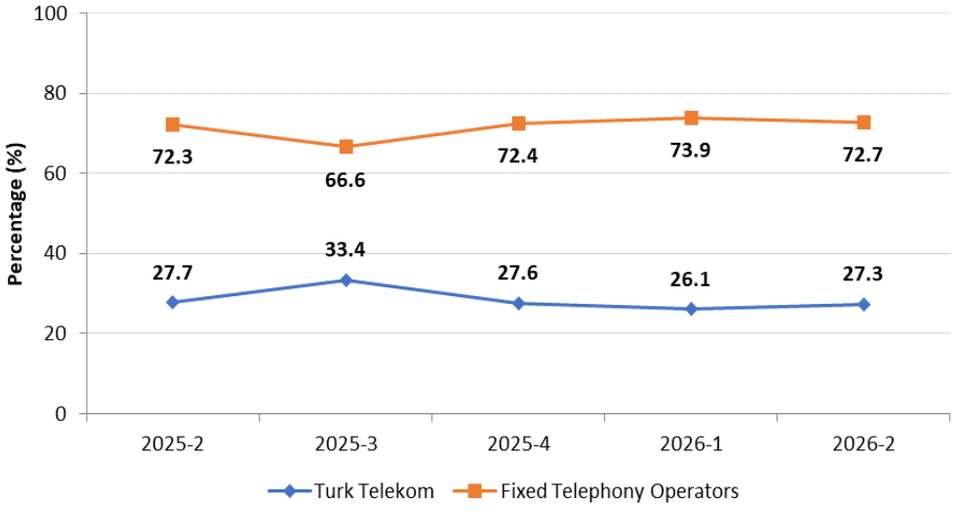


Figure 2-6 compares the market shares of alternative fixed telephony operators and Turk Telekom in call traffic directed to mobile networks. While fixed telephony their share 72.7% in Q2 2026 while Turk Telekom's market share for the same period was 27.3%.

*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 71.5% and the market share of fixed telephony operators 28.5%.

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

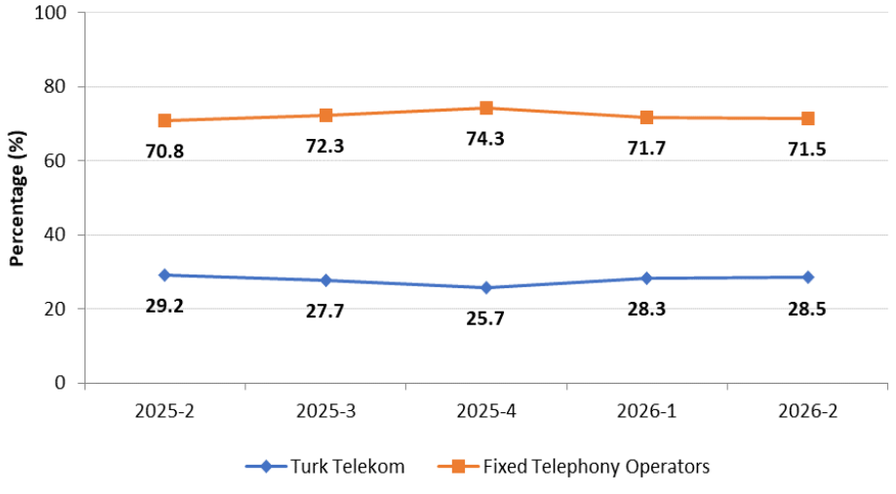



Figure 2-8 shows the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on the fixed network.Türk Telekom's share 27.6% in Q2 2026, while the share of fixed telephone operators at 72.4%.

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

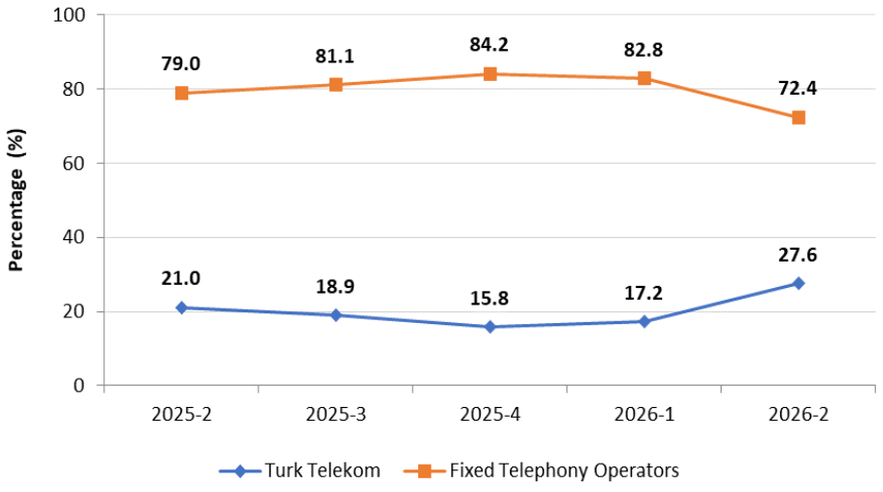



Figure 2-9 compares the market shares of alternative fixed telephony operators and Turk Telekom in international call traffic terminated on mobile networks. In Q2 2025, alternative fixed telephony operators held a market share of 82.1% in Q2 2026. Meanwhile, Turk Telekom's market share 17.9% during the same period.

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

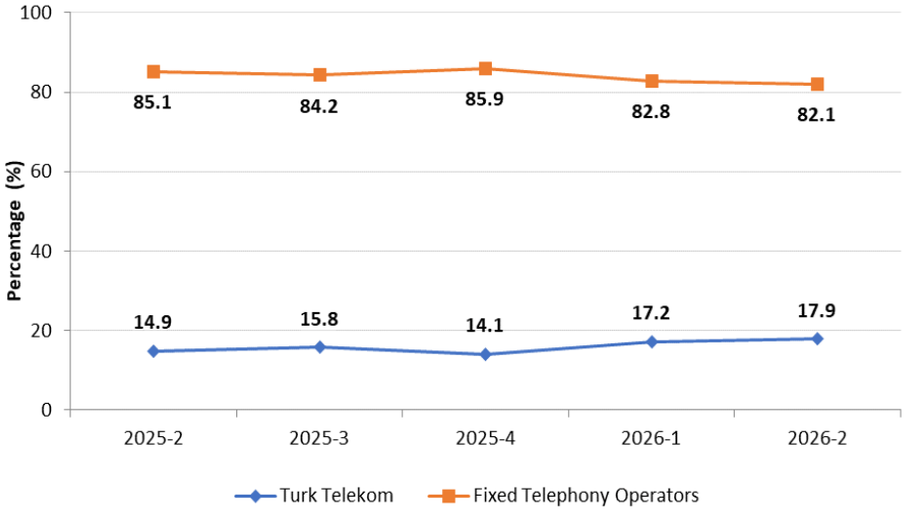
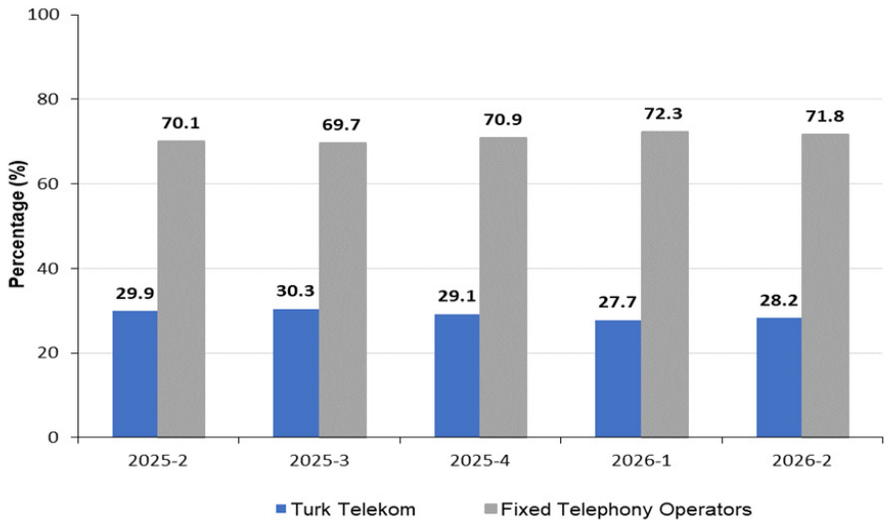



Figure 2-10 illustrates the shares of alternative fixed telephony operators and Turk Telekom in the total traffic originated on the fixed network. While alternative fixed telephony operators accounted for 70.1% share in this traffic in Q2 2025, their share increased to 71.8% in Q2 2026. During the same period, Turk Telekom's share declined from 29.9% to 28.2%.

*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 100.8 million in the second quarter of 2026, representing a 1.3% increase compared to the previous quarter. In the fixed broadband segment, the number of fiber subscribers increased by 3.8%. 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*

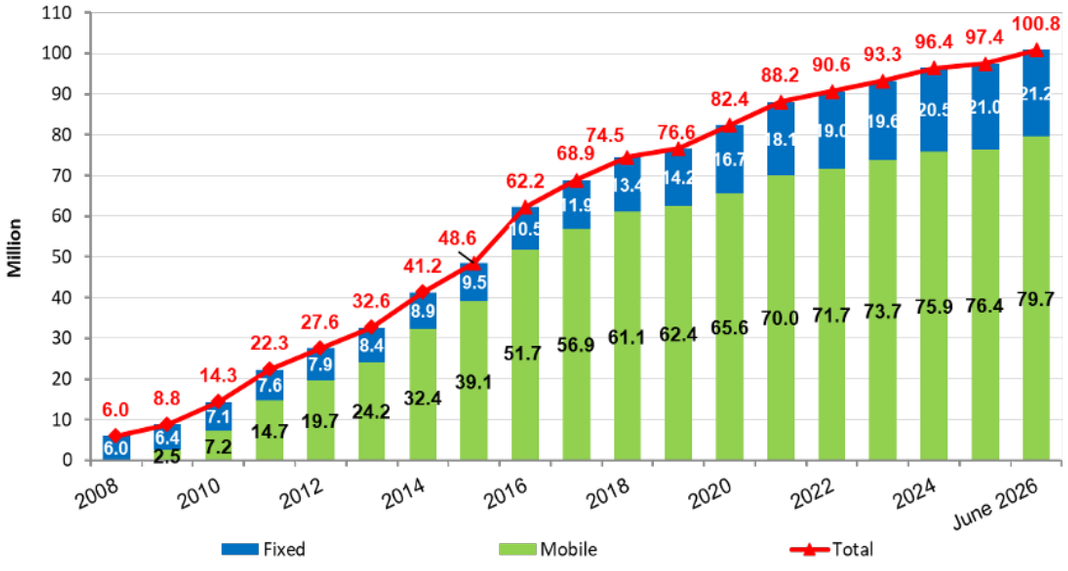



Table 3-1 shows the number of internet subscribers in Turkey by connection type and their quarterly and annual growth rates. As of the second quarter of 2026, total internet subscriptions increased by 1.3% compared to the previous three-month period, and the upward trend continued in fixed internet, particularly with the increase in fiber subscribers. The annual change rate in the number of internet subscribers was 3.6%.

*Table 3-1 Total Number of Internet Subscribers*

| | 2025-2 | 2026-1 | 2026-2 | Quarterly Growth Rate (2026-1..2026-2) | Annual Growth Rate (2025-2...2026-2) |
|---|---|---|---|---|---|
| **xDSL** | 9,607,418 | 8,347,167 | 8,000,522 | -4.2% | -16.7% |
| **Mobile Internet via Computer** | 848,732 | 762,257 | 768,955 | 0.9% | -9.4% |
| **Mobile Internet via Phone** | 75,784,682 | 77,495,014 | 78,888,110 | 1.8% | 4.1% |
| **Cable Internet** | 1,462,907 | 1,513,449 | 1,497,363 | -1.1% | 2.4% |
| **Fiber to the Home (FTTH)** | 7,571,719 | 9,150,396 | 9,574,321 | 4.6% | 26.4% |
| **Fiber to the Building (FTTB)** | 1,198,850 | 1,151,936 | 1,123,968 | -2.4% | -6.2% |
| **Fiber (Total)** | 8,770,569 | 10,302,332 | 10,698,289 | 3.8% | 22.0% |
| **Fixed Wireless Internet** | 667,110 | 867,666 | 780,055 | -10.1% | 16.9% |
| **Other** | 219,665 | 216,512 | 213,332 | -1.5% | -2.9% |
| **TOTAL** | **97,361,083** | **99,504,397** | **100,846,626** | **1.3%** | **3.6%** |

*Among the total mobile broadband subscribers 1,083,000 are Fixed Wireless (mobile), and under the Other category, there are 50,000 Metro Ethernet subscribers.*

Table 3-2 presents the revenue data for fixed broadband services over the past six years. In 2025, the revenues of the relevant operators reached 105.6 billion TRY, marking an 67% increase compared to the previous year.

*Table 3-2 Annual Fixed Broadband Service Revenues, ₺*

| Revenues | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| | 12,334,386,474 | 15,406,066,019 | 21,463,001,301 | 34,563,506,139 | 63,353,088,238 | 105,593,891,660 |

Table 3-3 presents the quarterly revenue data for fixed broadband services. In the second quarter of 2026, the total revenue from fixed internet service provision amounted to 33.6 billion TRY. Accordingly, there was an approximate 55% increase in the revenues of fixed broadband service providers compared to the same quarter of 2025.

*Table 3-3 Periodic Fixed Broadband Service Revenues, ₺*

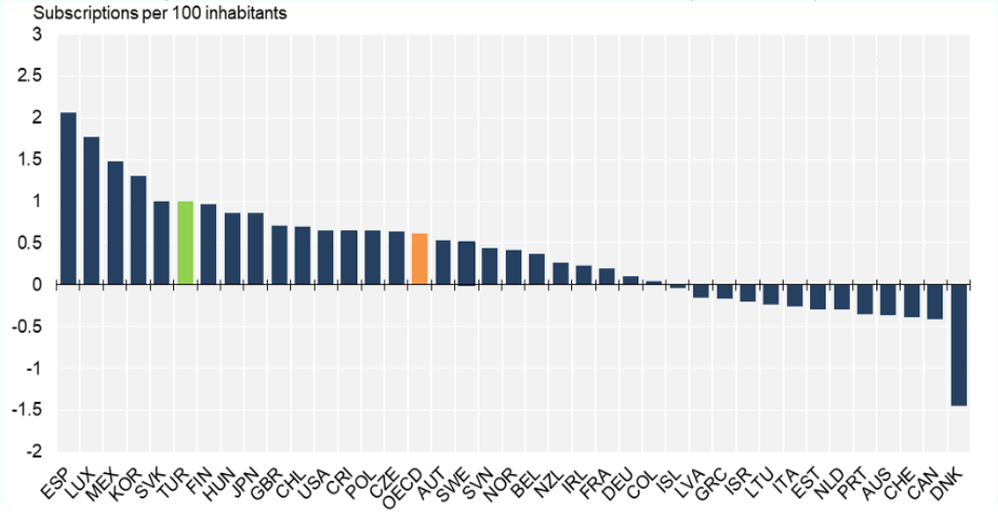
| Revenues | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| | 23,616,740,231 | 28,774,264,523 | 32,051,317,257 | 33,475,278,067 | 36,556,977,839 |

## 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 we look at fixed and mobile broadband penetration rates per capita in OECD countries and Turkey, we see that the fixed broadband penetration rate per capita in Turkey is 24.6%, while the OECD average is 36.5%, and the mobile broadband penetration rate per capita in Turkey is 92.5%, while the OECD average is 139.9%.

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




*Source: OECD Broadband Portal, BTK*

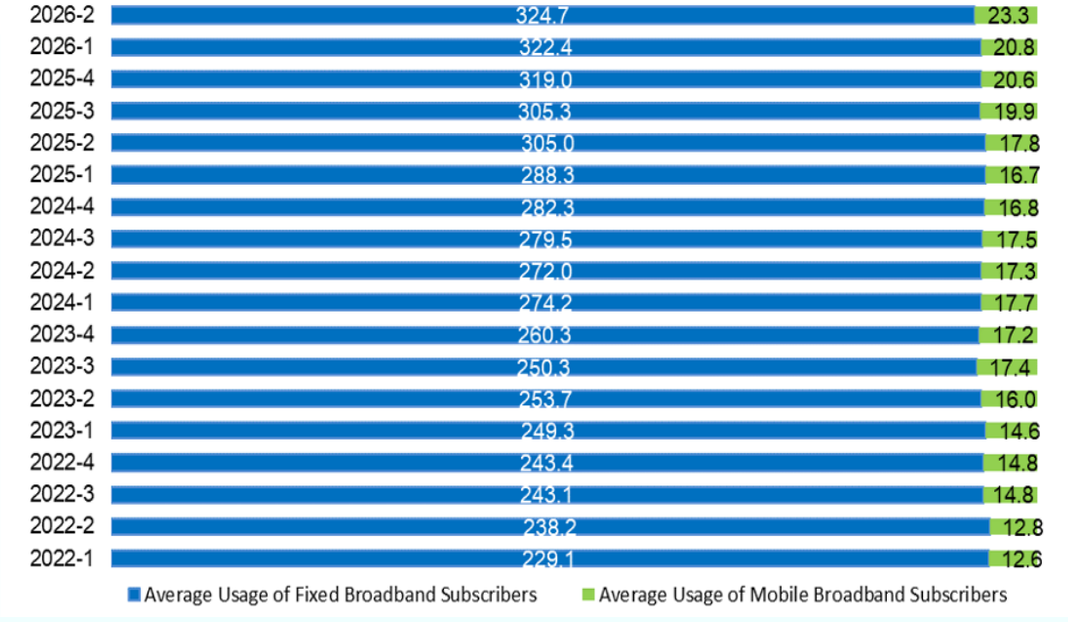
*3 Data for OECD countries are dated June 2024, and data for Türkiye are dated June 2025.*

## 3.3 USAGE AMOUNTS

Since its launch in July 2009, mobile broadband services have seen a 1.8% increase in mobile internet subscribers (both from computers and mobile phones) compared to the previous quarter, reaching 79.7 million. Total mobile internet usage increased by 14.3% during this period, reaching 5.58 million TByte. In the second quarter of 2026, total fixed broadband internet usage (download and upload), including cable internet, increased by 0.4% to 20.64 million TByte.

Figure 3-3 shows the average monthly usage per subscriber for fixed broadband (including cable internet) and mobile broadband (from computers and mobile phones). In the second quarter of 2026, the average monthly usage of fixed broadband internet subscribers was 324.7 GByte, while the average monthly usage of mobile broadband internet subscribers was 23.3 GByte. Compared to the previous three-month period, the average monthly usage of fixed broadband internet subscribers increased by 0.7% in the first quarter of 2026, and the average monthly usage of mobile broadband internet subscribers also increased by 12.3%.

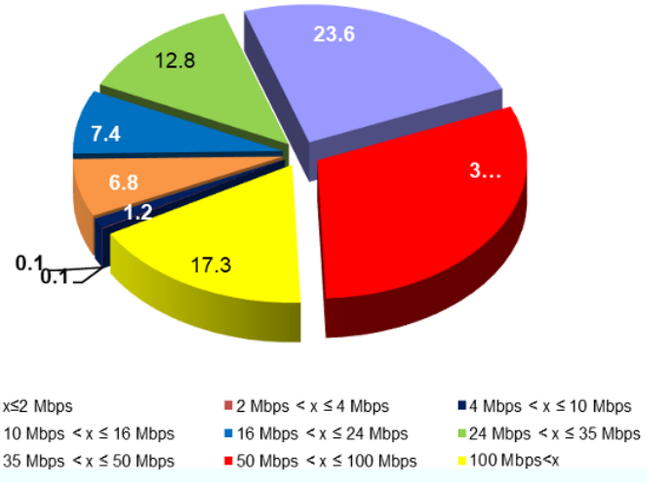
*Şekil 3-3 Average Monthly Usage per Subscriber, GByte*



## 3.4 DISTRIBUTION OF SUBSCRIBERS BY SPEED AND USAGE

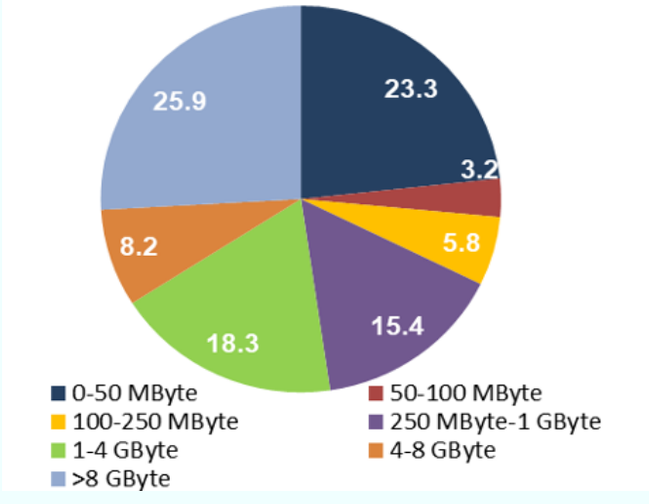
Figures 3-4 show the distribution of fixed broadband internet subscribers according to speed. Accordingly, in the second quarter of 2026, approximately 6.8% of fixed broadband subscribers in Turkey preferred packages offering speeds between 10-16 Mbps, and 7.4% preferred packages offering speeds between 16-24 Mbps. Furthermore, the percentage of subscribers who preferred speeds between 24-50 Mbps was 36.5%, while the percentage of subscribers who preferred speeds above 50 Mbps was 48.1%.

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



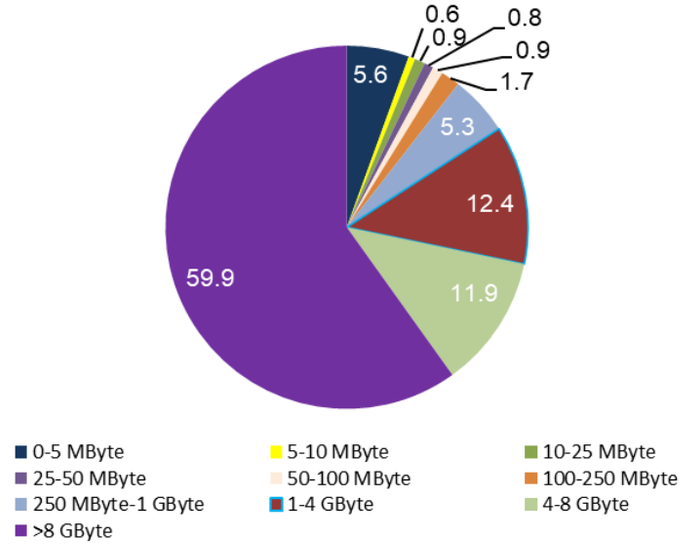

Figures 3-5 show the distribution of mobile internet subscribers according to their usage amount. Examining the figures, it can be seen that 73.5% of subscribers use more than 100 MByte. The lowest usage range, 0-50 MByte, accounts for 23.3% of subscribers.

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




Figures 3-6 show the distribution of mobile internet subscribers according to their usage amount. 91.2% of mobile internet subscribers have usage exceeding 100 MByte. This distribution shows a concentration of subscribers using more than 8 GByte, with a rate of 59.9%.

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




## 3.5 DISTRIBUTION OF SUBSCRIBERS BASED ON TECHNOLOGY

Figures 3-7 show the distribution of fixed broadband subscribers in Turkey by technology. The share of subscribers using xDSL technology in the total fixed broadband market continued to decline as of the second quarter of 2026, falling to 37.8%. The market share of subscribers using cable internet service was 7.1%, while the share of subscribers using fiber internet service in the total fixed broadband market continued to increase, reaching 50.5%.

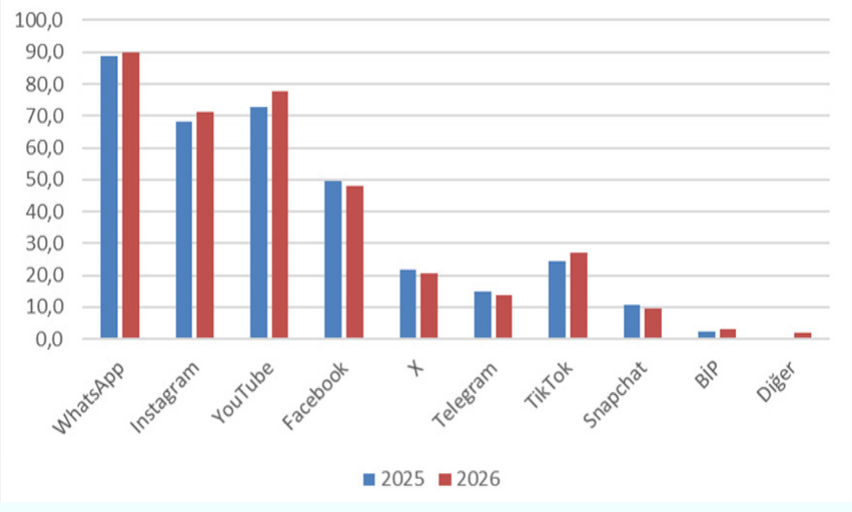
*Figure 3-7 Distribution of Fixed Broadband Subscribers by Technology, %*



## 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 2026. According to the survey results, the top three platforms used for social media are WhatsApp, Instagram, and YouTube, respectively.

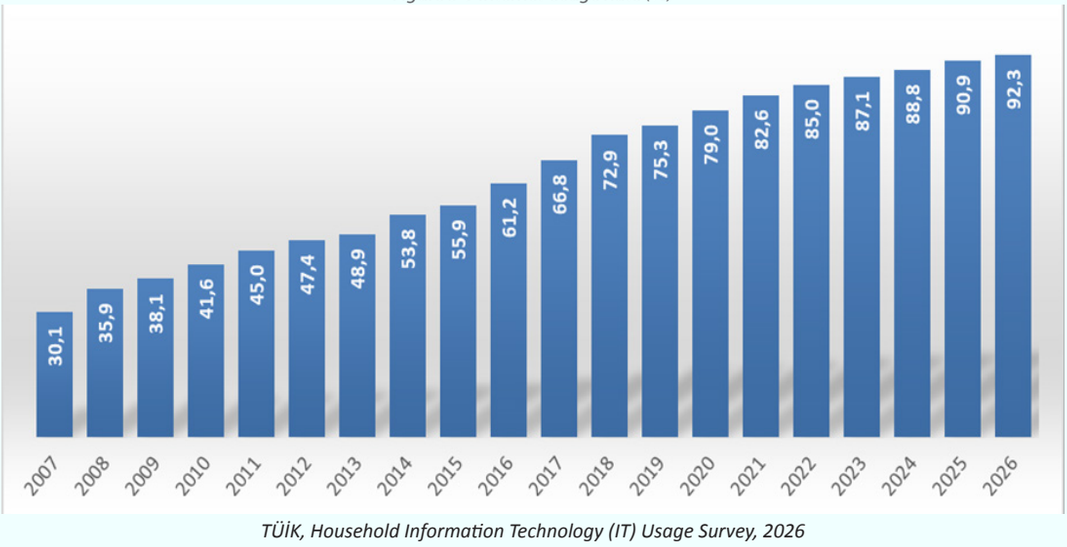
*Figure 3-8 Rate of Social Media and Messaging Application Usage (%)*




*TÜİK, Household Information Technologies (IT) Usage Survey, 2026*

According to the Household Information Technology Usage Survey conducted by the Turkish Statistical Institute (TÜİK) shown in Figure 3-9, the internet usage rate increased approximately threefold from 30.1% in 2007 to 92.3%.

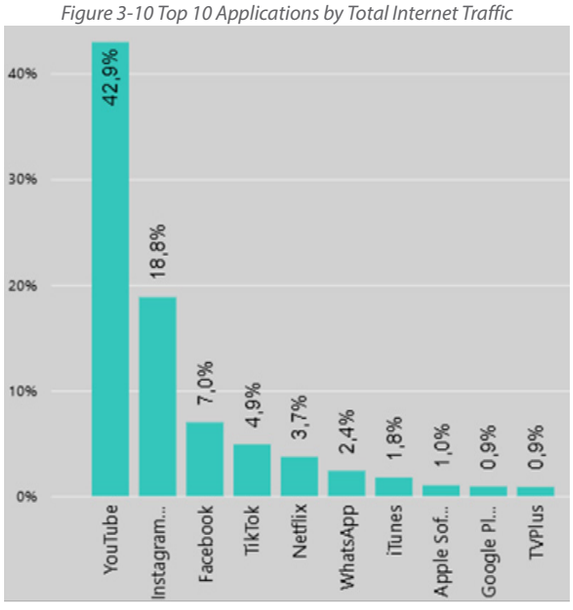
*Figure 3-9 Internet Usage Rate (%)*




*TÜİK, Household Information Technology (IT) Usage Survey, 2026*

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 42.9% of traffic, followed by Instagram with 18.8% and Facebook with 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 56.4% share of total traffic, YouTube is followed by Instagram at 19.6% and TikTok at 6.4%. 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*

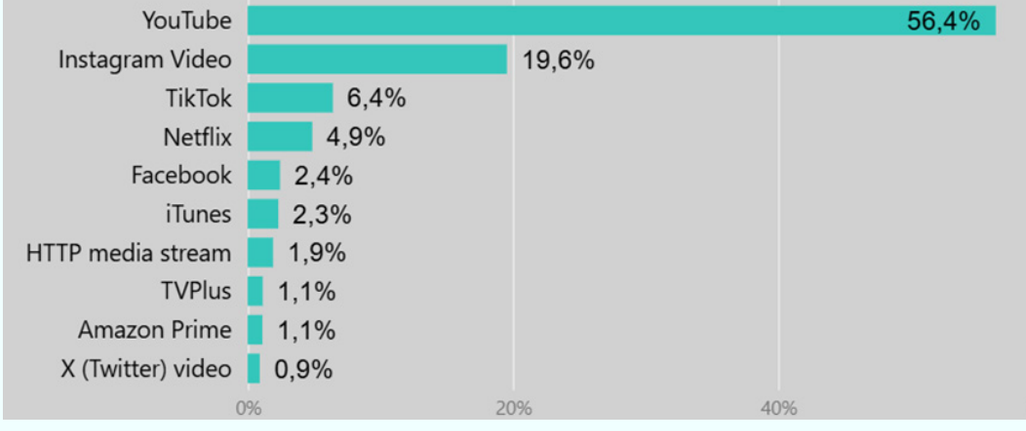



Figure 3-12 shows the most commonly used applications in the Instant Messaging category. According to the data in the chart, Instagram is the most widely used application in the Instant Messaging category, representing 47.2%. Instagram is followed by Facebook (40.4%) and WhatsApp (6.4%). These three 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*

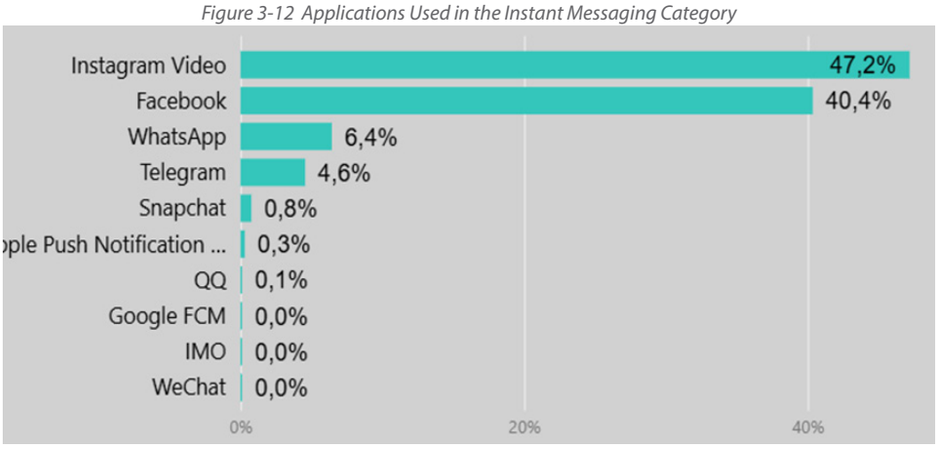



Figure 3-13 shows the most commonly used applications in the VOIP (Voice over IP) category. According to the chart, WhatsApp is by far the most widely used application in the VoIP category. WhatsApp leads the pack, accounting for 55.1% of total traffic. It is followed by Face Time with 19.4%, Facebook with 4.1%, WebRTC with 3.7%, and RTP with 2.9%. 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*

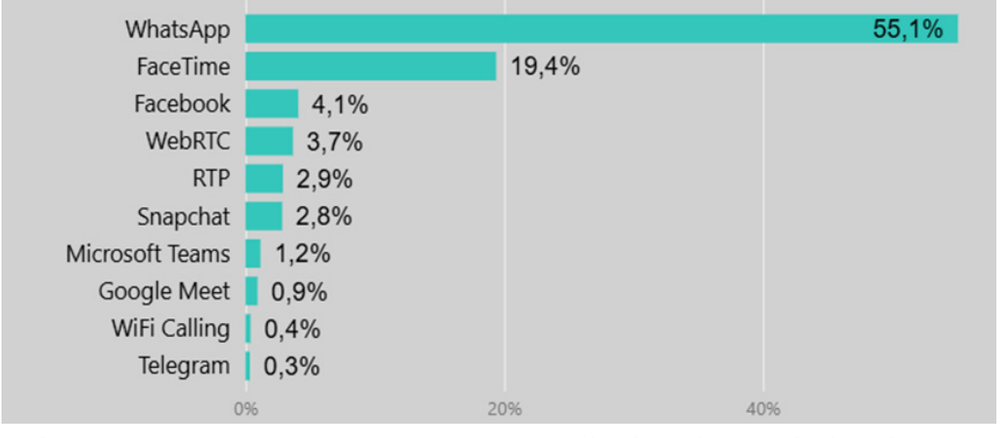



Figure 3-14 shows the most commonly used applications in the Online Games category. According to the data in this chart, the most widely used application platform in the Online Games category is PlayStation with 25.3%. It is followed by Steam (24.9%), PUBG (6%), and Xbox (5.9%). This data demonstrates 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*

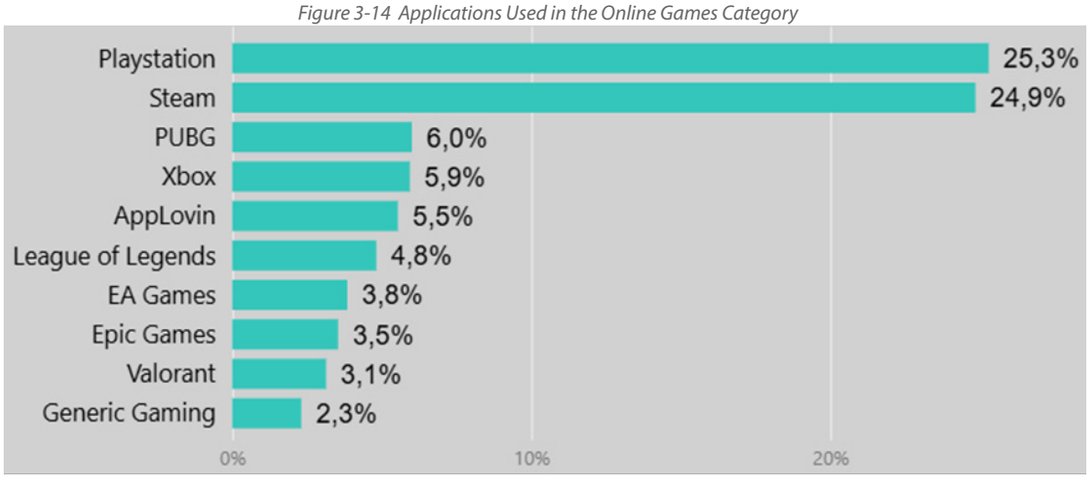



Figure 3-15 shows commonly used applications in the Network Storage category. According to the chart, iCloud is the most widely used application in the Network Storage category. iCloud leads the pack in this category with 57.4%, and is particularly popular for data synchronization and backup services between devices within the Apple ecosystem. It is followed by Google Cloud Strorage with 11.7% and Microsoft Office 365 with 7%. This data demonstrates that Apple, Microsoft 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*

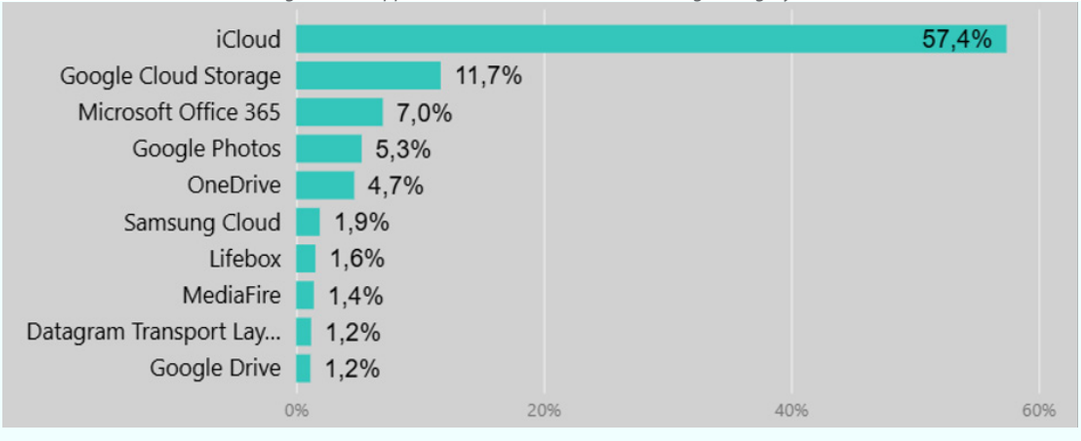



Figure 3-16 shows the most commonly used applications in the Web Browsing category. According to the chart, QUIC is the protocol and service that generates the most traffic in the Web Browsing category. With 53%, QUIC stands out by far, particularly thanks to its low latency and faster connection establishment, making it widely used in modern web browsing experiences. It is followed by SSL v3 at 9.5% and Facebook at 7.6%. 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*

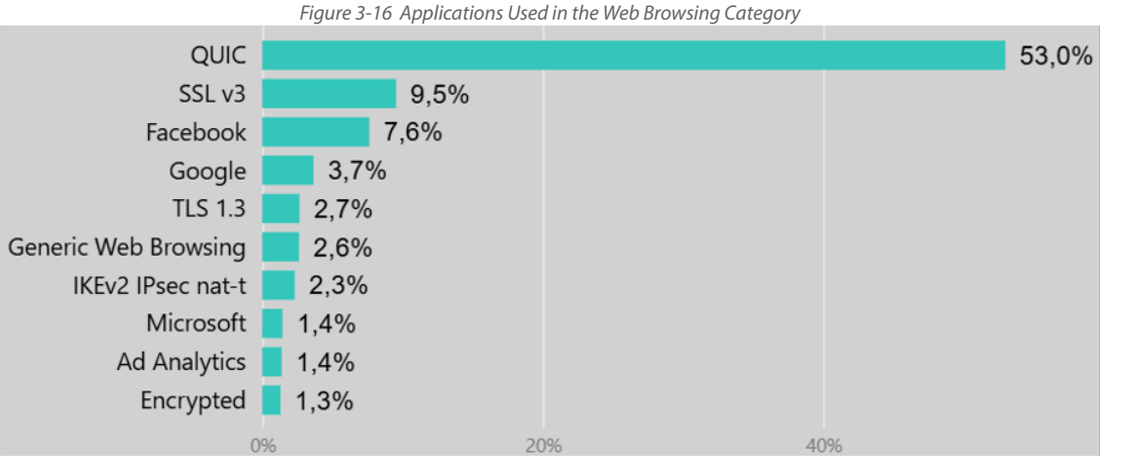



Figure 3-17 shows commonly used applications in the Software Updates category. According to the chart, Apple Software Update generated the most traffic in the Software Updates category. Apple Software Update led the way with 39.1%, followed by Google Play at 34.9% and Windows Updates at 12%. These three platforms dominate total update traffic. This data demonstrates that software updates are particularly prevalent among major platform providers (Google, Apple, Microsoft), and that user devices are constantly updated for security, performance, and functionality.

*Figure 3-17 Applications Used in the Software Updates Category*

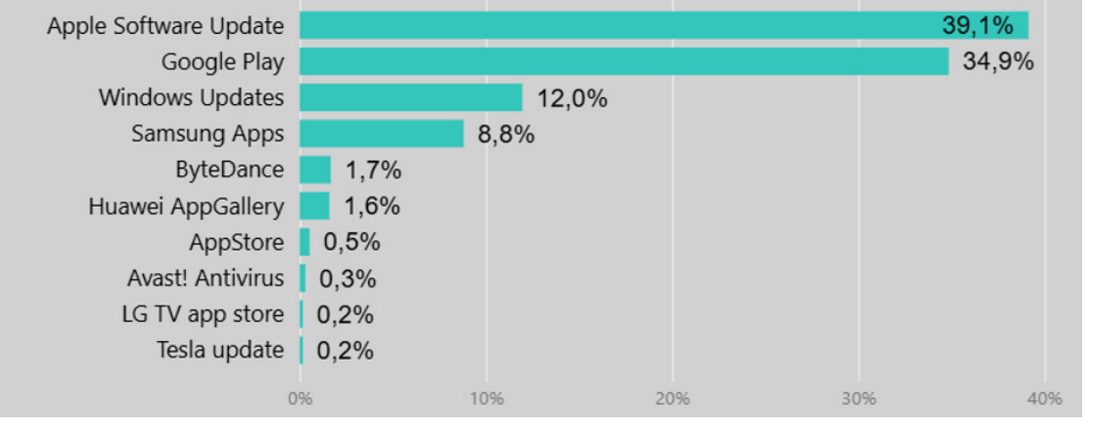
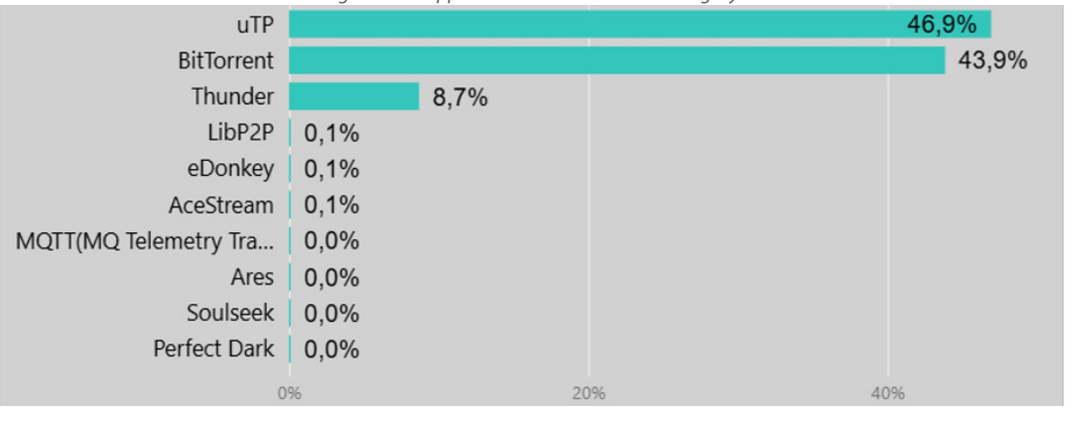



Figure 3-18 shows the most commonly used applications in the P2P (Peer-to-Peer) category. According to the chart, uTP is the most widely used application in the P2P category. This application ranks first with 46.9%, followed by BitTorrent with 43.9% and Thunder with 8.7%. This data demonstrates that 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

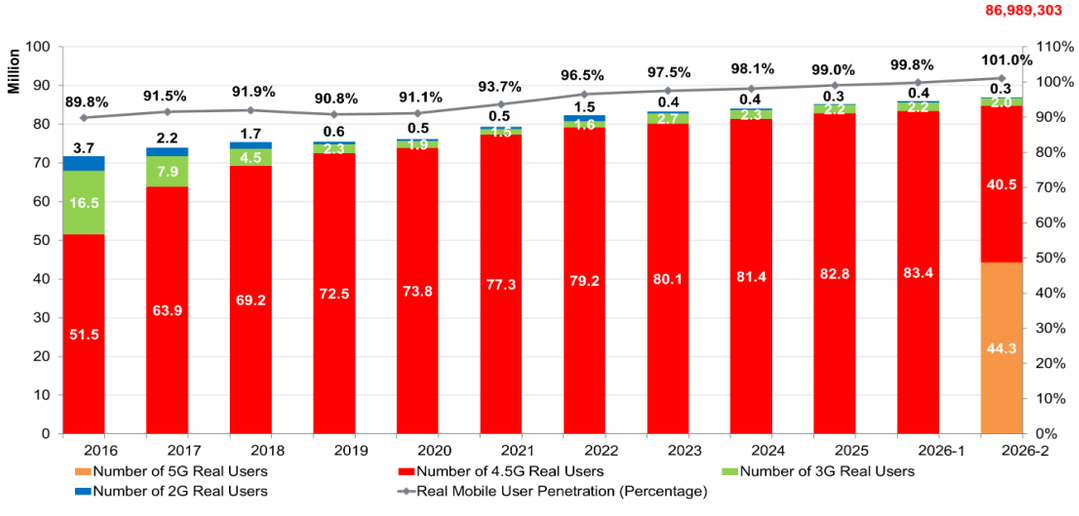
# MOBILE MARKET DATA

# 4 MOBILE MARKET DATA

## 4.1 NUMBER OF SUBSCRIBERS AND PENETRATION

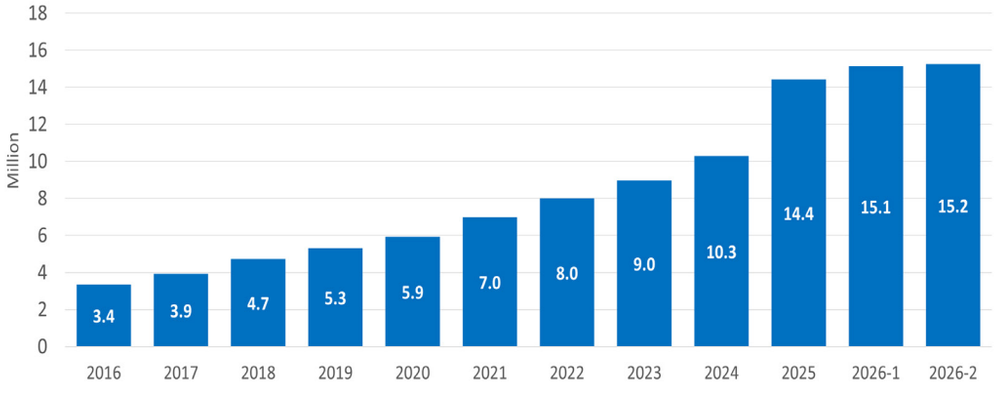
As of the end of June 2026, there were a total of 86,989,303[4] mobile real users in Türkiye, excluding machine-to-machine (M2M) subscribers, corresponding to a penetration rate of approximately 101%. The 3G service, which was launched in July 2009, reached 65,949,652 subscribers by the end of March 2016. However, following the introduction of 4.5G on April 1, 2016, a rapid transition from 3G to 4.5G subscriptions took place. As of the end of June 2026, the number of 3G real users was 1,995,710, the number of 4.5G real users was 40,451,151, while the number of 5G real users reached 44,268,946. Figure 4-1 compares the number of 2G, 3G, 4.5G and 5G mobile real users and their penetration rates over the years.

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




On the other hand, as of the end of June 2026, the number of machine-to-machine (M2M) subscribers reached approximately 15.2 million (Figure 4-2).

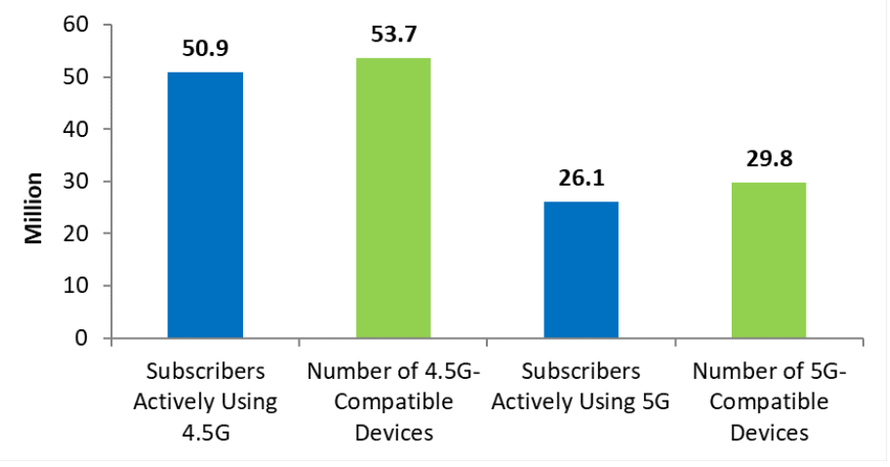
*Figure 4-2 Number of M2M Subscribers Based on Subscription*




*4 As of December 31, 2025, the population of Türkiye was 86,092,168 according to the Turkish Statistical Institute (TurkStat).*
**As of the first quarter of 2026, M2M subscribers have been excluded from the total subscriber figures and are presented separately in Figure 4.2. Consequently, penetration rates have been calculated on the basis of actual subscribers.*

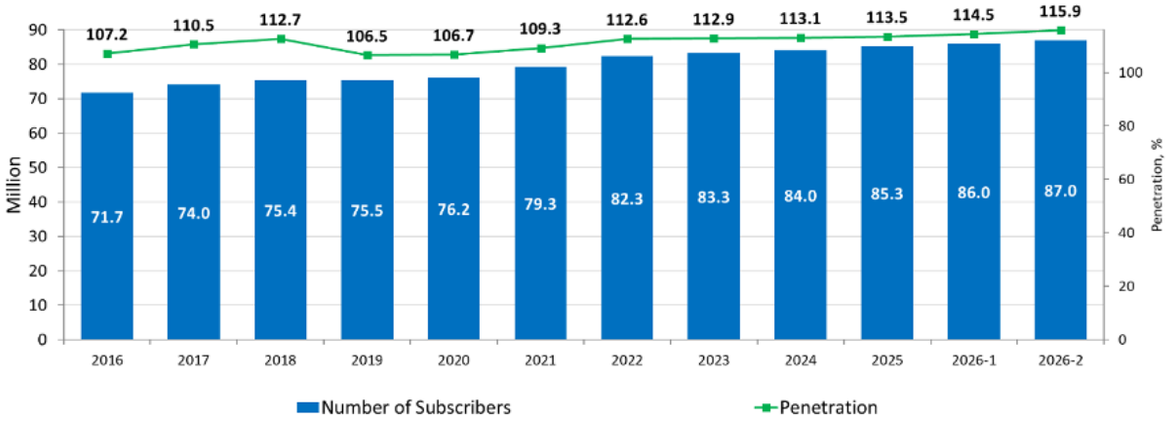
For the 4.5G service that started on April 1, 2016, the number of "active 4.5G subscribers" (the number of subscribers whose devices and SIM cards are compatible with 4.5G service) was 50,874,048 at the end of June 2026, while the number of 4.5G compatible devices was 53,664,776. For 5G services, which were launched on April 1, 2026, as of the end of June 2026, the number of "active 5G subscribers" was 26,102,844, while the number of 5G-compatible devices was 29,777,164 (Figure 4-3).

*Figure 4-3 Number of Active Mobile Subscribers and Compatible Devices (4.5G and 5G)*




Based on the assumption that mobile devices are generally used by people over the age of 9, mobile penetration rates were calculated in Figure 4-4, excluding the 0-9 age population and M2M users. Accordingly, it is seen that the mobile penetration rate is 115.9%.[5]

*Figure 4.4 The Number of Mobile Subscribers and Penetration Rate Based on Population Excluding Ages 0-9[6]*




5 *As of December 31, 2025, the population of Türkiye, excluding the population aged 0-9, is 75,079,696 (TurkStat).*

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

Table 4-1 presents data on 3G, 4.5G and 5G services. In the second quarter of 2026, the number of 3G subscribers was 6,264,985, while the number of 4.5G subscribers reached 49,649,162 and the number of 5G subscribers reached 44,487,035. The number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with 3G, 4.5G and 5G services was 79,657,065, and the number of mobile broadband subscribers receiving internet service from mobile computers and mobile phones together with 4.5G and 5G services was 77,051,294. The total mobile internet usage amount in the second quarter of 2026 was 5,578,135 TBytes, and the total mobile internet usage amount of 4.5G and 5G users was 5,526,512 TBytes.

*Table 4-1 3G , 4.5G and 5G Service User Data**

| | 2024-4 | 2025-1 | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|---|---|
| Number of 3G Subscribers (Including M2M Subscribers) | 4,345,125 | 4,546,099 | 4,829,995 | 5,887,769 | 6,398,149 | 6,467,448 | 6,264,985 |
| Number of 4.5G Subscribers (Including M2M Subscribers) | 87,662,081 | 88,184,767 | 89,513,414 | 91,099,845 | 91,210,754 | 92,611,86 | 49,649,162 |
| Number of 5G Subscribers (Including M2M Subscribers) | 0 | 0 | 0 | 0 | 0 | 0 | 44,487,035 |
| Number of Mobile Computer Internet Users (Total) | 706,492 | 757,744 | 848,732 | 813,152 | 775,395 | 762,257 | 768,955 |
| Number of Mobile Computer Internet Users (4.5G+5G) | 567,414 | 608,625 | 702,219 | 679,277 | 673,865 | 671,067 | 678,436 |
| Mobile Internet Usage via Handsets (Total) | 75,180,553 | 74,526,293 | 75,784,682 | 76,518,642 | 75,667,652 | 77,495,014 | 78,888,110 |
| Mobile Internet Usage via Handsets (4.5G+5G) | 70,039,380 | 70,081,445 | 71,358,163 | 72,331,468 | 72,662,492 | 74,855,666 | 76,372,858 |
| Mobile Internet Usage via other devices, TByte (Total) | 3,744,694 | 3,690,971 | 3,986,733 | 4,508,636 | 4,606,956 | 4,880,219 | 5,578,135 |
| Mobile Internet Usage via other devices, TByte (4.5G+5G) | 3,617,609 | 3,576,414 | 3,863,141 | 4,377,602 | 4,496,144 | 4,826,061 | 5,526,512 |

**Some data are revised due to operators' system updates*

Figure 4-5 shows the number of mobile broadband internet subscribers as postpaid and

prepaid. As of the second quarter of 2026, the number of prepaid mobile broadband subscribers was 11,595,589 and the number of postpaid mobile broadband subscribers was 66,523,194.

*Figure 4-5 Number of Prepaid and Postpaid Mobile Broadband Subscribers, Thousands*

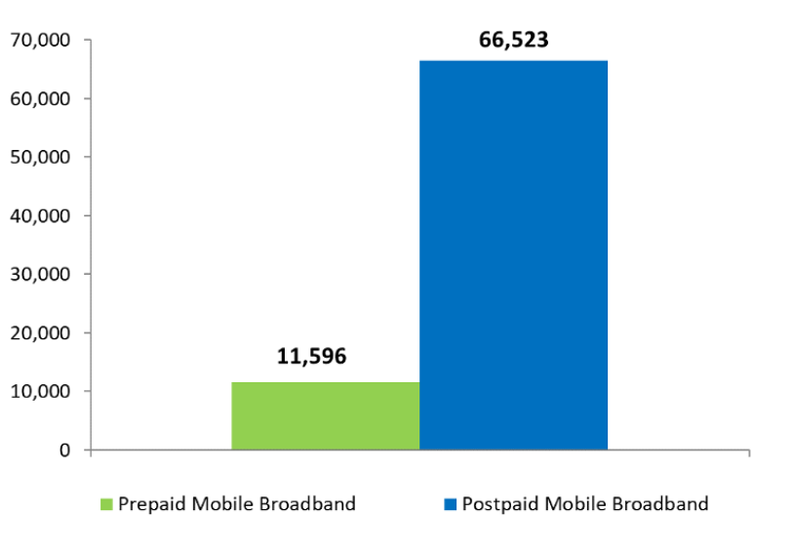
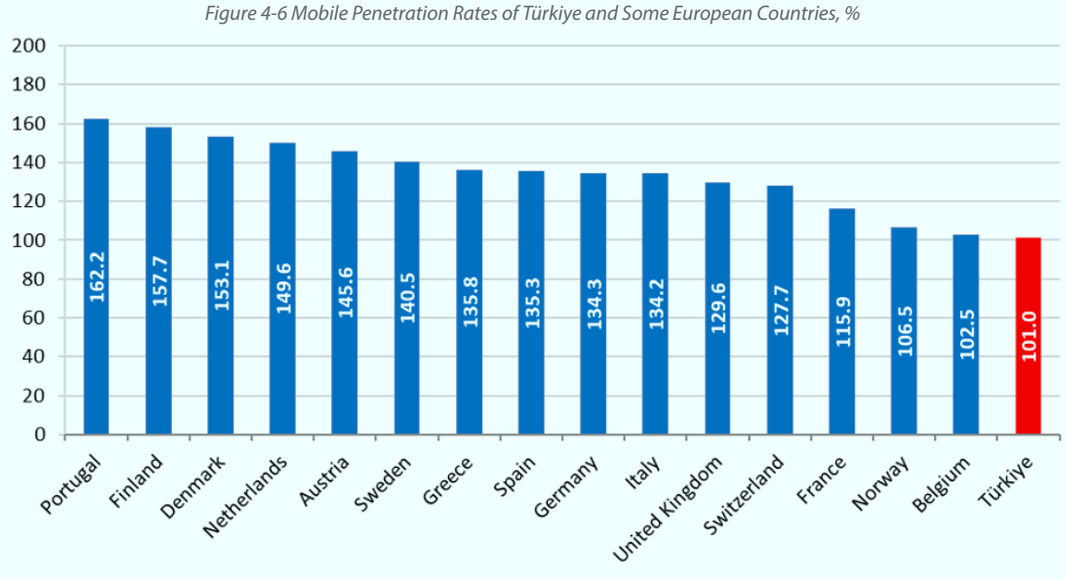



Figure 4-6 compares the mobile penetration rates of Türkiye and some European countries. As of the second quarter of 2026, the ones with the highest mobile penetration rates among European countries are Portugal, Finland, Denmark, Netherlands and Austria. The average mobile penetration rate of the listed countries is approximately 135.4%. In Türkiye, the mobile penetration rate is 101% as of June 2026.

*Figure 4-6 Mobile Penetration Rates of Türkiye and Some European Countries, %*

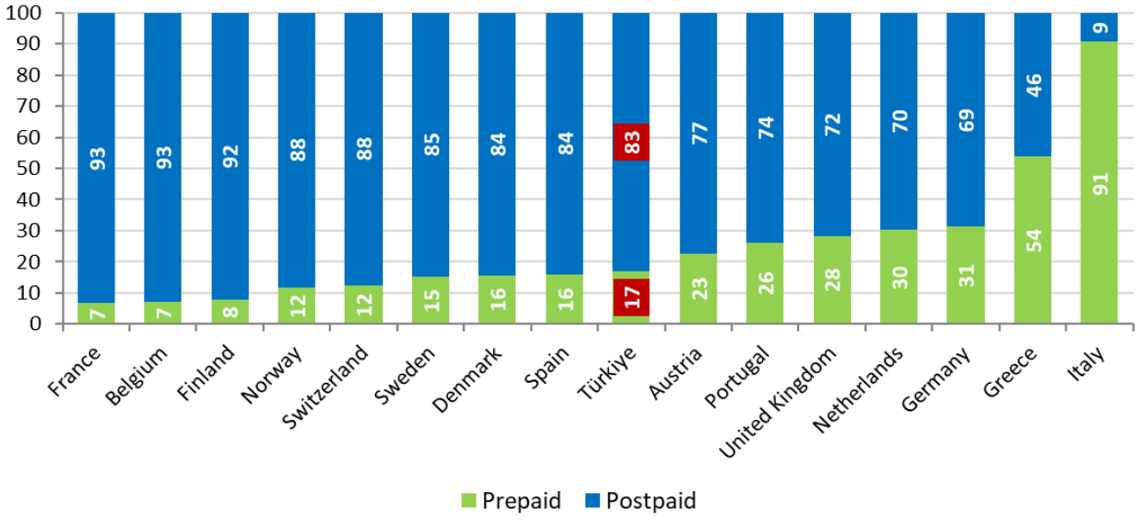



*Source: GSMA Intelligence 2026-Q2, BTK.*

## 4.2 MOBILE SUBSCRIBER PROFILE

Figure 4-7 compares prepaid and postpaid mobile subscriber percentages in some European countries and Türkiye. The average of prepaid subscriber percentages is 25% in the listed European countries. It is 17% in Türkiye.

*Figure 4-7 Prepaid/Postpaid Subscription Rates in Some European Countries and Türkiye, %*




*Source: GSMA Intelligence 2026-Q2, BTK.*

Figure 4-8 shows the total number of subscribers in mobile network operators quarterly. The number of subscribers increased by 1.7% for TT Mobil, by 0.6% for Turkcell and by 1.2% for Vodafone in the second quarter of 2026, compared to the previous quarter.

*Figure 4-8 Total Number of Subscribers by Mobile Operator, Million (Including M2M Subscribers)*

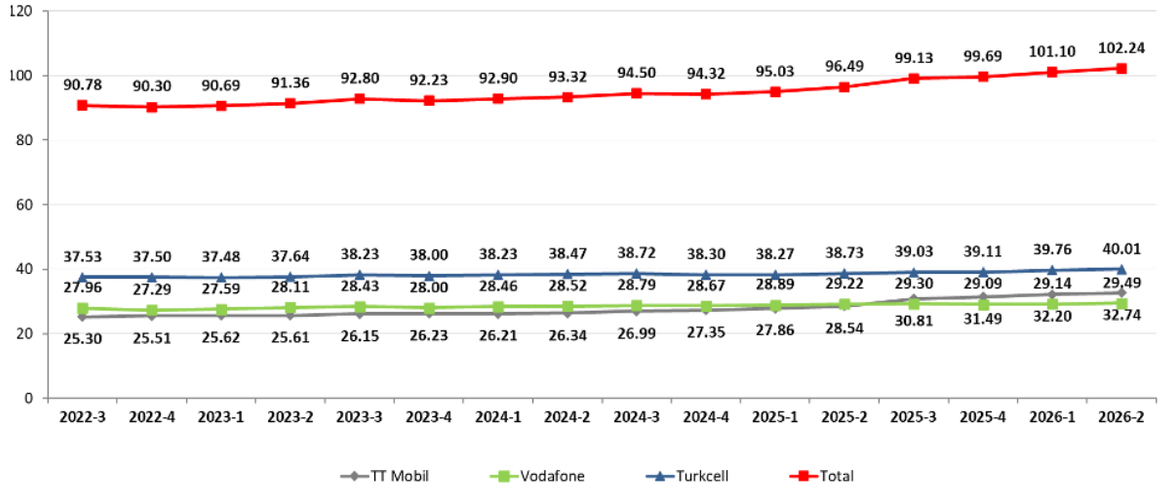



Figure 4-9 presents the number of successfully ported mobile numbers quarterly. In the second quarter of 2026, the number of ported mobile numbers decreased by 19.6% compared to the previous quarter, totaling 2,782,985. As of June 30, 2026, a cumulative total of 214,078,593 numbers are ported.[7]

7 *Starting from the 2021-Q2 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 Total Number of Mobile Number Portability Transactions*

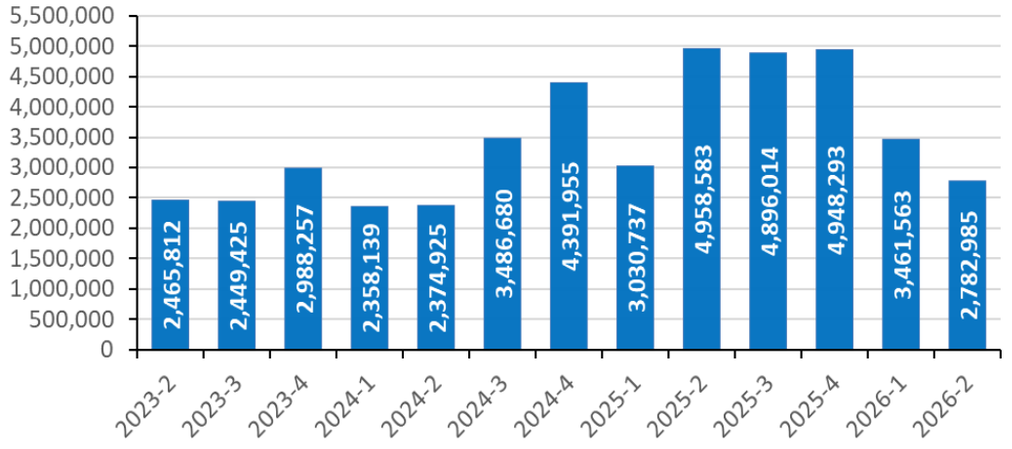



Figure 4-10 presents the quarterly net number of subscribers gained by mobile operators through mobile number portability (MNP). Through the Mobile Number Portability (MNP) service, in the second quarter of 2026, TT Mobil gained approximately 161,000 subscribers, while Turkcell lost approximately 86,000 subscribers and Vodafone lost approximately 75,000 subscribers.

*Figure 4-10 Net Number of Incoming Subscribers to Mobile Operators via MNP, Thousands*

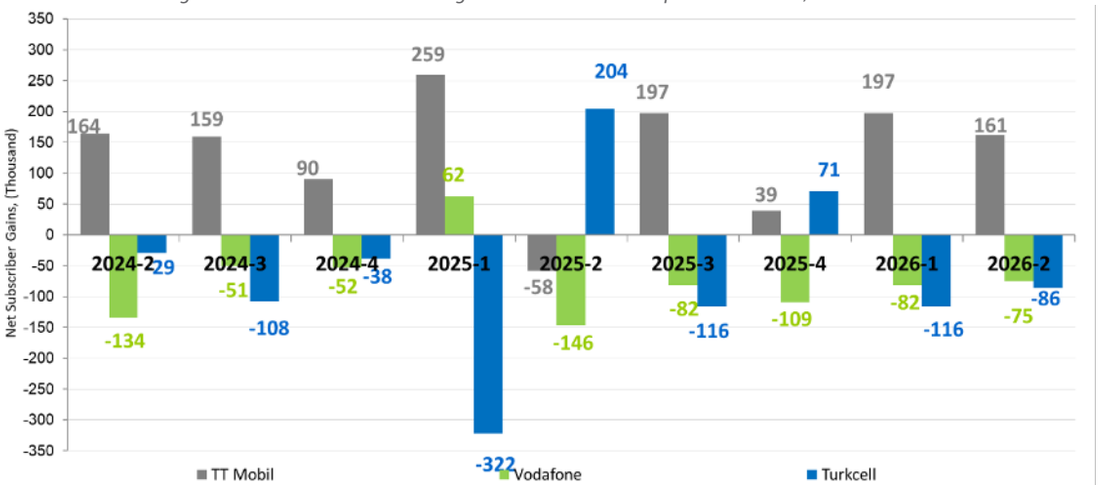



Figure 4-11 shows the market shares of mobile operators based on the number of subscribers. As of the second quarter of 2026, based on the number of subscribers, Turkcell holds a market share of 39.1%, TT Mobil 32% and Vodafone 28.8%.

*Figure 4-11 Market Shares of Mobile Operators by Number of Subscribers (%)*

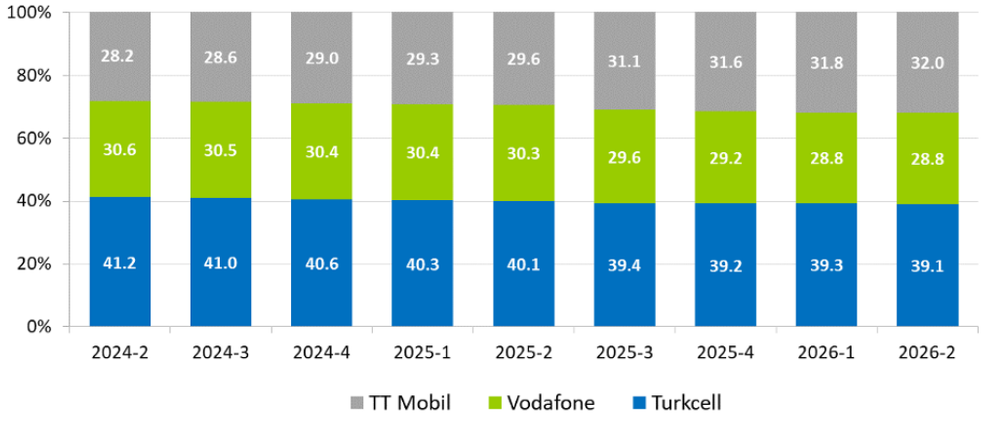
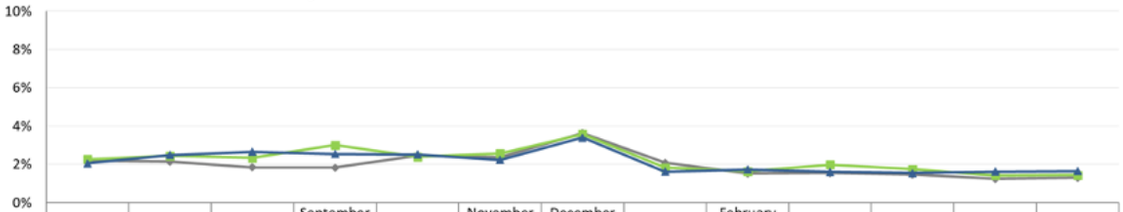


Figure 4-12 presents the monthly subscriber churn rates of mobile operators for the past 12 months, including the second quarter of 2026. As of June 2026, the subscriber churn rates of TT Mobil, Vodafone, and Turkcell were %1.3, %1.4 and %1.6 respectively.

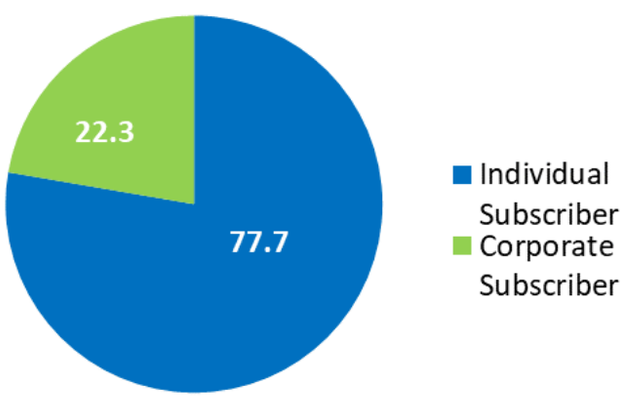
*Figure 4-12 Subscriber Churn Rates of Mobile Operators (%)*




| | June 25 | July 25 | August 25 | September 25 | October 25 | November 25 | December 25 | January 26 | February 26 | March 26 | April 26 | May 26 | June 26 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TT Mobil | 2.2% | 2.1% | 1.8% | 1.8% | 2.5% | 2.4% | 3.6% | 2.1% | 1.5% | 1.5% | 1.5% | 1.2% | 1.3% |
| Vodafone | 2.3% | 2.4% | 2.3% | 3.0% | 2.4% | 2.6% | 3.6% | 1.8% | 1.6% | 2.0% | 1.7% | 1.4% | 1.4% |
| Turkcell | 2.0% | 2.5% | 2.7% | 2.5% | 2.5% | 2.2% | 3.4% | 1.6% | 1.7% | 1.6% | 1.5% | 1.6% | 1.6% |

Figure 4-13 examines the subscriber base of mobile operators by type: individual (real persons) vs. corporate (legal entities). As of the second quarter of 2026, approximately 77.7% of mobile subscribers were personal while 22.3% were corporate.

*Figure 4-13 Distribution of Mobile Subscribers by Type (%)*



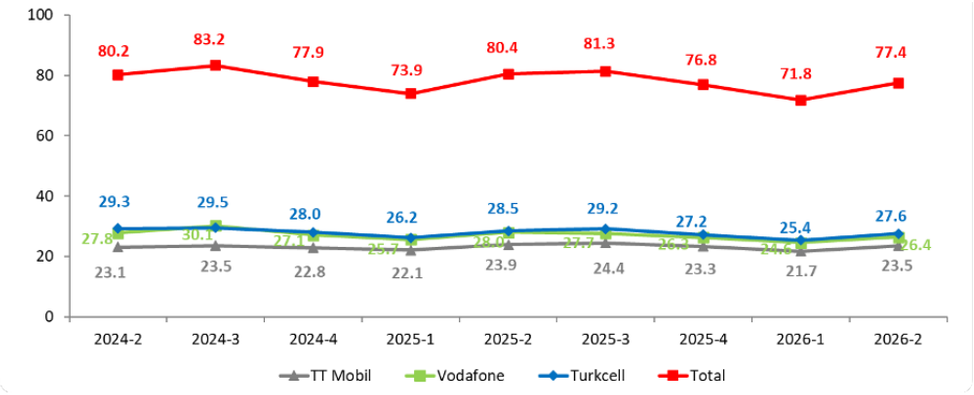

## 4.3 MOBILE TRAFFIC VOLUME

Total mobile traffic volume in the second quarter of 2026 was 77.4 billion minutes. When traffic data for the second three months of 2026 is compared to the previous three-month period, it is seen that total mobile traffic increased by 7.9%, while it declined by 3.7% compared with the same period of the previous year.

When examined on an operator basis, compared with the previous quarter, Turkcell's traffic increased by 8.4%, TT Mobil's traffic increased by 8.3%, and Vodafone's traffic increased by 7%. Compared with the same period of the previous year, TT Mobil's traffic volume decreased by 1.8%, Turkcell's traffic volume decreased by 3.3% and Vodafone's traffic volume decreased by 5.8%. The changes in mobile traffic volume [8] across periods are presented in Figure 4-14.

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

*Figure 4-14 Total Traffic of Mobile Operators by Quarter (Billion Minutes)*




The market shares of mobile operators in total mobile traffic by period are shown in Figure 4-15. Compared with the previous period, TT Mobil's market share increased from 30.3% to 30.4% and Turkcell's market share increased from 35.4% to 35.6%, while Vodafone's market share decreased from 34.3% to 34%. Compared with the same period of the previous year, TT Mobil's and and Turkcell's market share rose from 29.8% to 30.4% and from 35.5% to 35.6%, respectively, whereas Vodafone's market share declined from 34.8% to 34%.

*Figure 4-15 Market Shares of Mobile Operators by Traffic (%)*

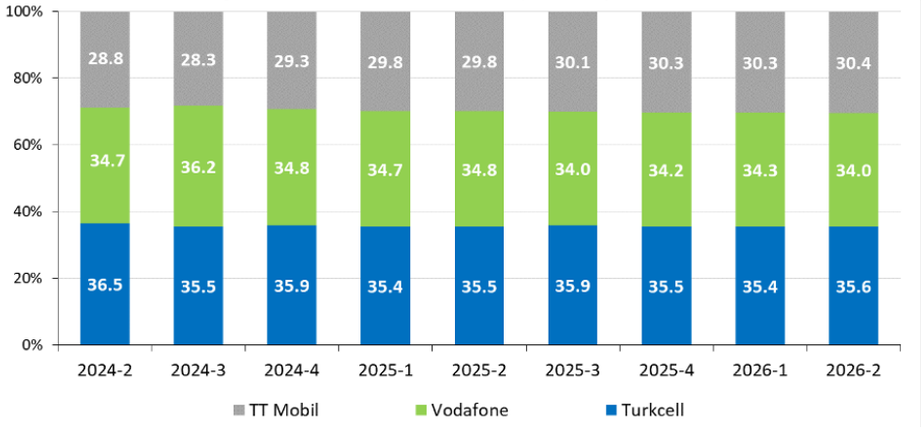
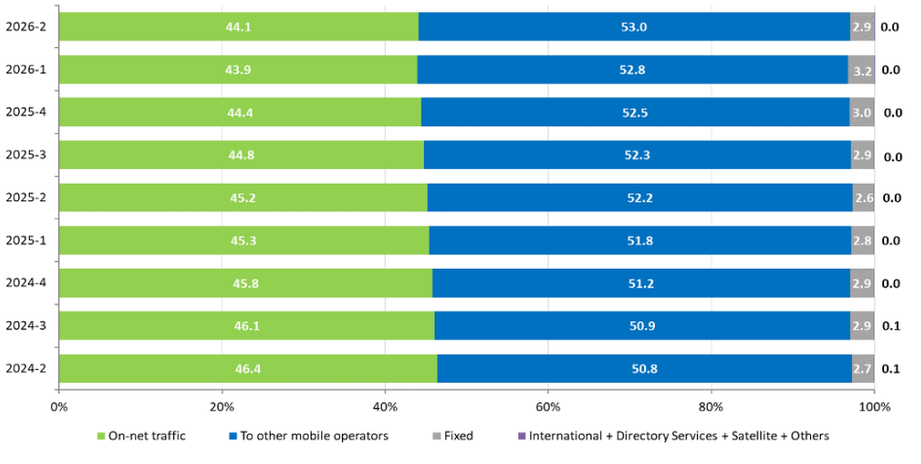



Figure 4-16 presents the distribution of total traffic generated by mobile operators. In the second quarter of 2026, the majority of this traffic (53%) is calls from one mobile operator to the other mobile operators. On-net traffic, which refers to calls between subscribers of the same operator, accounted for 44.1% of the total traffic.

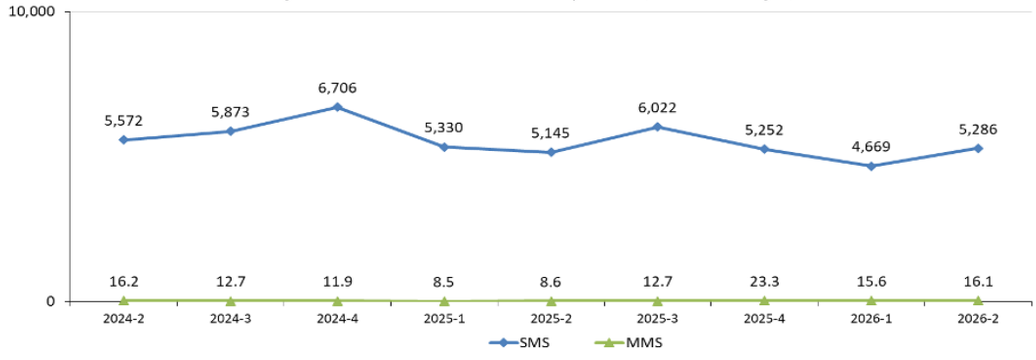
*Figure 4-16 Distribution of Mobile Traffic (%)*



## 4.4 SMS AND MMS

The total number of SMS was approximately 5.3 billion, while the number of MMS was around 16.1 million in the second quarter of 2026 (Figure 4-17).

*Figure 4-17 SMS and MMS Volumes by Period (Million Messages)*




## 4.5 MOBILE REVENUES

Figure 4-18 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 ₺256.2 billion in 2024 increased by 45.1% year-on-year to ₺371.7 billion in 2025, while on TPL basis, total revenues of ₺219.7 billion in 2024 increased by 51.8% year-on-year to ₺333.7 billion in 2025.

*Figure 4-18 Revenues from Mobile Services by Year, Billion ₺*

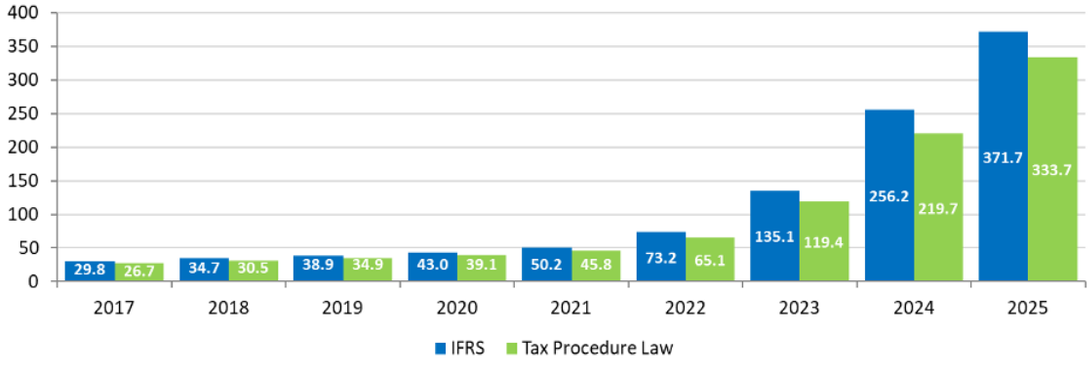
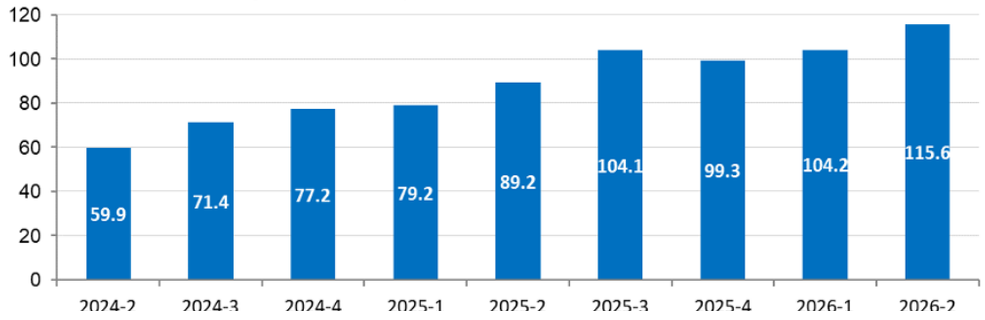



Figure 4-19 shows the quarterly revenues of operators from mobile telecommunication services starting from the second quarter of 2024. In the second quarter of 2026, mobile service revenues amounted to approximately ₺115.6 billion.

*Figure 4-19 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 4-20 shows the quarterly market shares of mobile operators based on net sales revenues. As of the second quarter of 2026, Turkcell's market share was 41.1%, Vodafone's market share was 34.7% and TT Mobil's market share was 24.2%. In the second quarter of 2026, compared to the previous period, TT Mobil's market share by revenue decreased by 0.2, Vodafone's market share decreased by 0.7, while Turkcell's market share increased by 0.9. Compared to the same period in 2025, TT Mobil's market share decreased by 0.2, Vodafone's market share decreased by 0.4, whereas Turkcell's market share increased by 0.5.

*Figure 4-20 Market Share of Mobile Operators by Total Revenue, %*

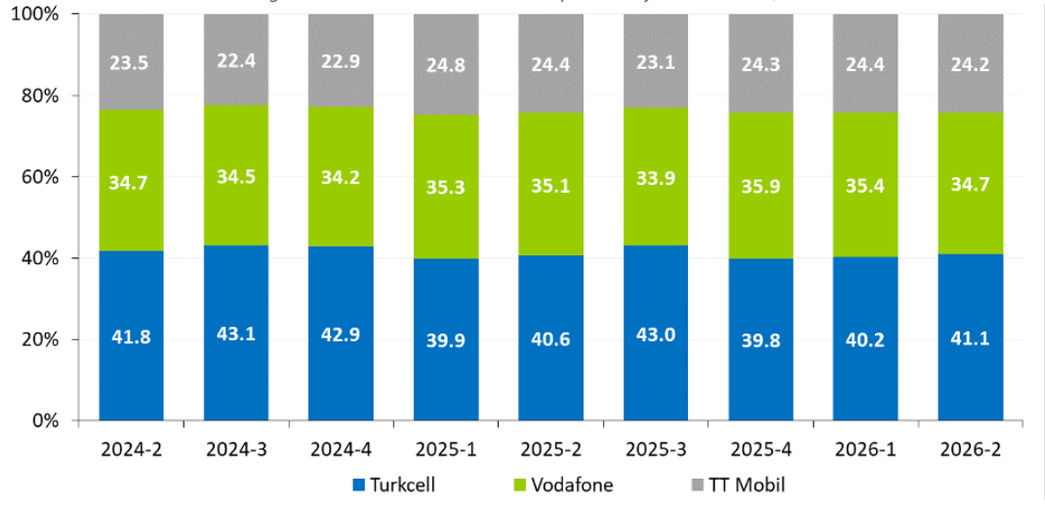
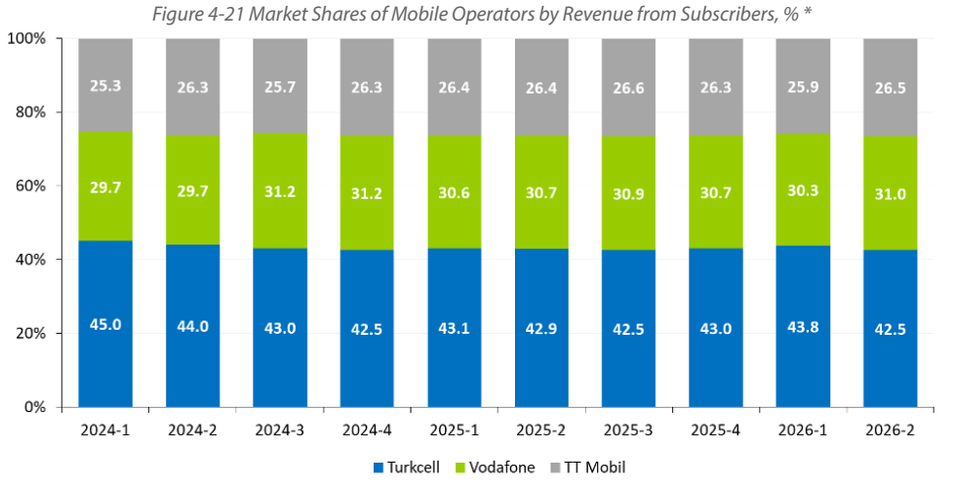



Figure 4-21 shows the market shares of mobile operators based on their revenues from subscribers. As of the second quarter of 2026, Turkcell's market share was 42.5%, while Vodafone and TT Mobil's market shares were 31% and 26.5%, respectively.

*Figure 4-21 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 4-22 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 7.3% in 2025. The share of data revenues increased from 1.3% in 2008 to 84.1% in 2025. SMS and MMS revenues account for 7.3% of total revenues in 2025.

*Figure 4-22 Distribution of Mobile Operators' Revenue, %*

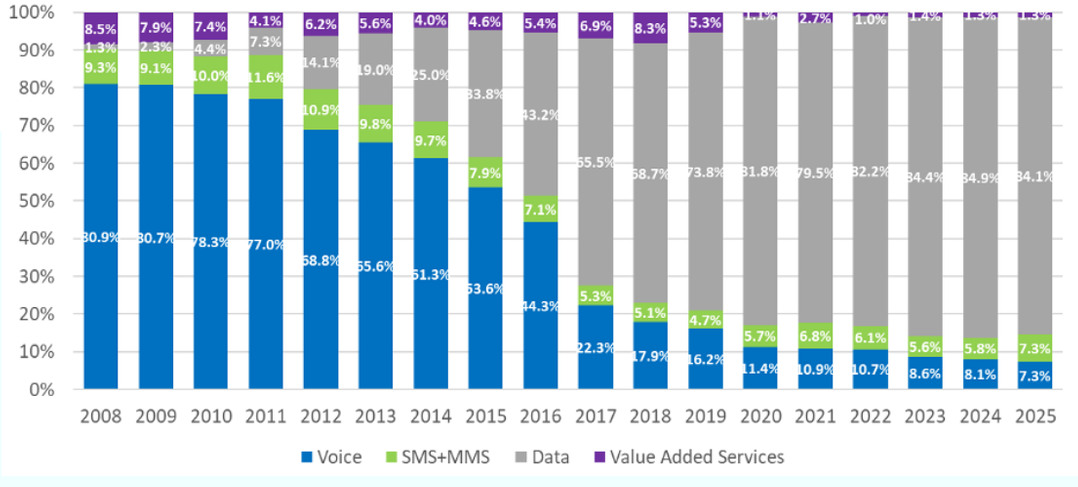
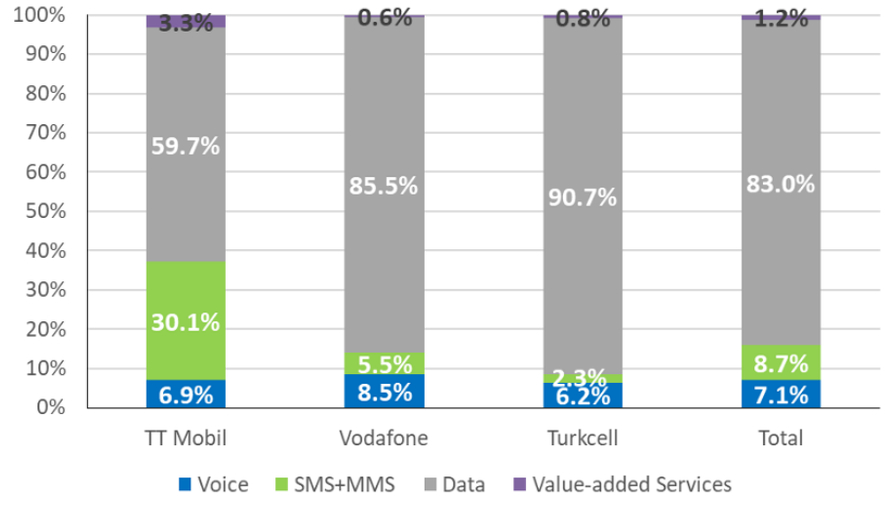



Figure 4-23 presents a comparative breakdown of total revenues of each mobile operator as of the second quarter of 2026. As of the second quarter of 2026, telephony revenues accounted for 6.9% of TT Mobil's revenues, 8.5% of Vodafone's revenues and 6.2% of Turkcell's revenues. SMS and MMS revenues accounted for 30.1% of TT Mobil's revenues, 5.5% of Vodafone's revenues and 2.3% of Turkcell's revenues. Data revenues accounted for 59.7% of TT Mobil's, 85.5% of Vodafone's and 90.7% of Turkcell's revenues[9]

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

*Figure 4-23 Revenue Distribution of Mobile Operators %*




## 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 4-24 shows the quarterly average ARPU figures of mobile operators in Türkiye. As of the second quarter of 2026, the average monthly revenue per subscriber for Turkcell is ₺368.5, for Vodafone ₺364.4 and for TT Mobil ₺280.4.

*Figure 4-24 Mobile ARPU, ₺*

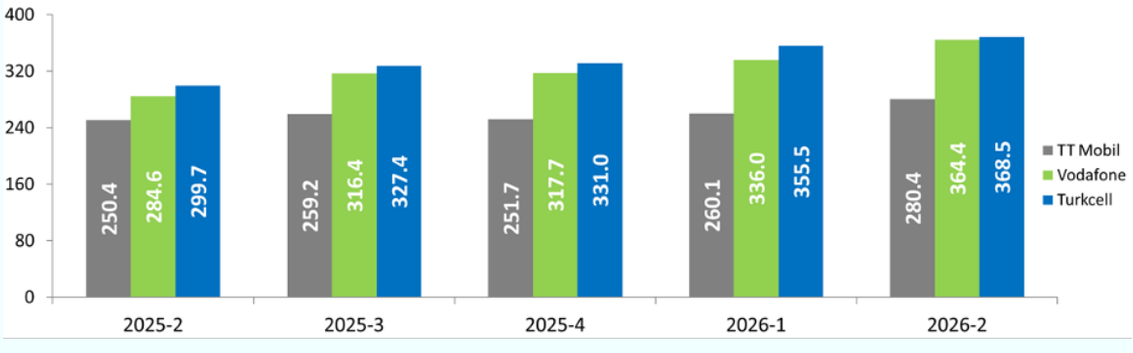
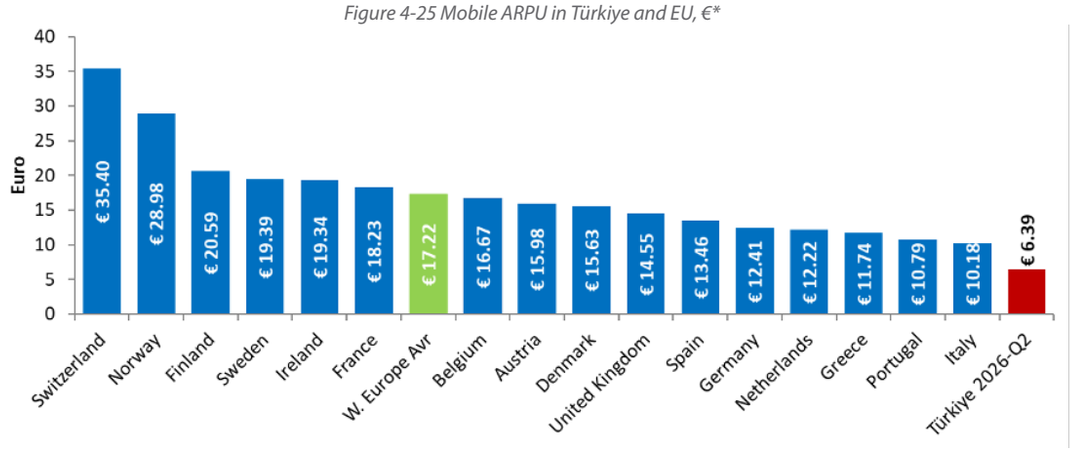



Figure 4-25 compares mobile ARPU figures for some European countries and Türkiye. While the average ARPU in the European countries examined in the figure is 17.22 €, it is 6.39 € in Türkiye for the second quarter of 2026.

*Figure 4-25 Mobile ARPU in Türkiye and EU, €**



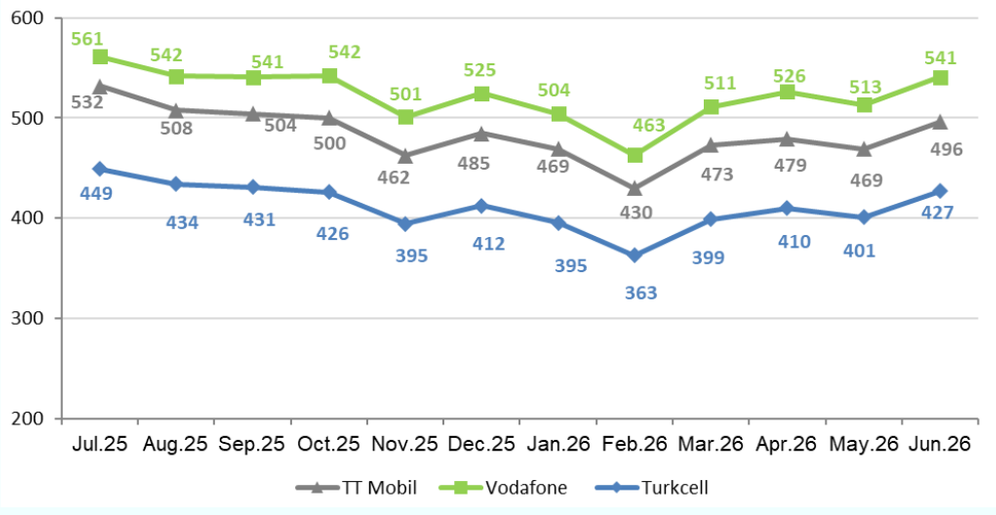

*Source: GSMA Intelligence 2026-Q2, BTK.*

** 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 2026-Q2, 1 Euro =₺52.855269.*

## 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 4-26 shows the MoU values of mobile operators on a monthly basis starting from July 2025. As of June 2026, Turkcell's MoU was 427 minutes, Vodafone's MoU was 541 minutes and TT Mobil's MoU was 496 minutes.

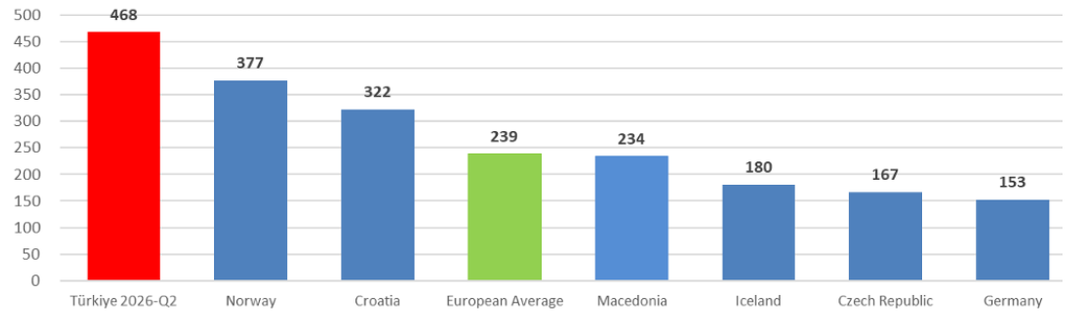
*Figure 4-26 MoU Values by Mobile Operator, min/month **




*"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 4-27 shows the average MoU in some European countries and Türkiye. In the second quarter of 2026 Türkiye made the highest usage compared to the European countries with an average MoU of 468 minutes.

*Figure 4-27 Average Calls per Mobile Subscriber in the EU and Türkiye, min/month **




*Source: GSMA Intelligence 2026-Q2, BTK[10].*

## 4.8 MOBILE INVESTMENT

Figure 4-28 shows the total annual investment of the three mobile operators between 2019 and 2025. The total mobile investment in 2025 is around ₺81.9 billion.

*Figure 4-28 Total Annual Mobile Investment, Million ₺*

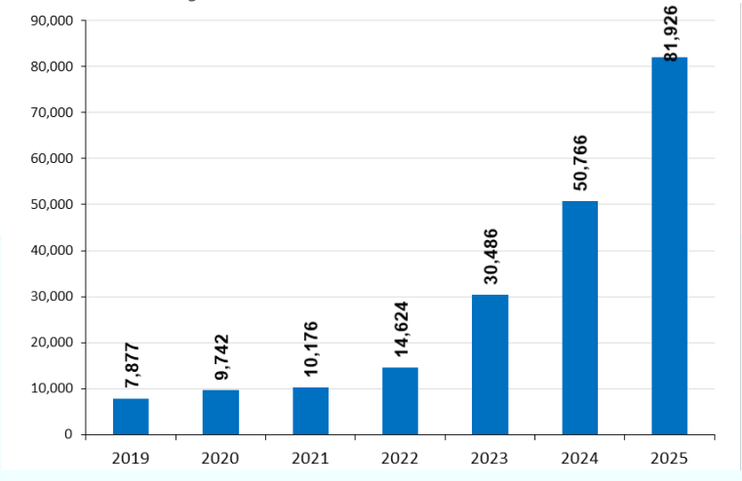
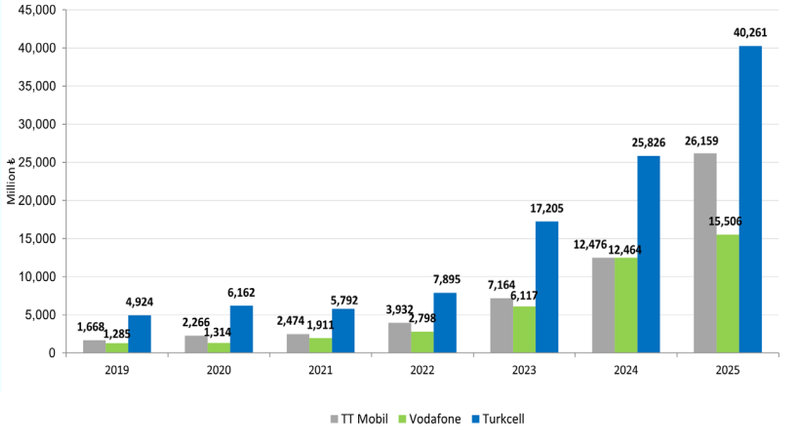



Figure 4-29 shows the annual investments of mobile operators separately. In 2025, Vodafone invested ₺15,506 million, TT Mobil ₺26,159 million and Turkcell ₺40,261 million.

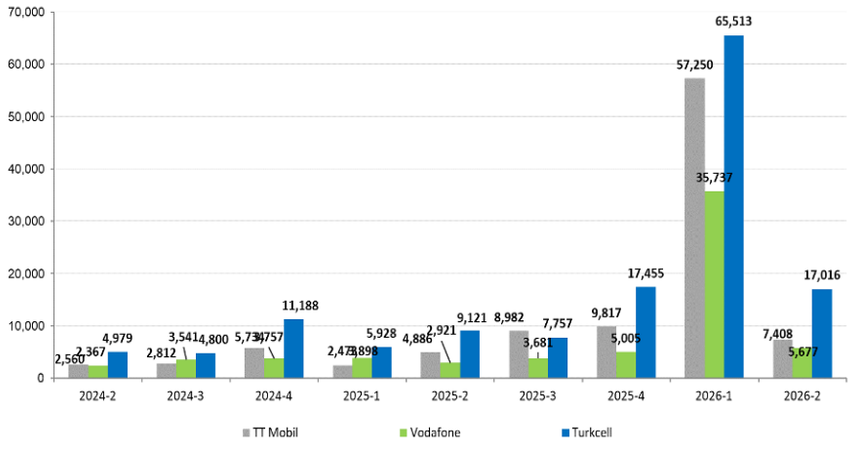
*Figure 4-29 Annual Mobile Investment by Operator, Million ₺*




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

Figure 4-30 shows the quarterly investments of mobile operators. TT Mobil invested ₺7,408 million, Turkcell ₺17,016 million and Vodafone ₺5,677 million in the second quarter of 2026.

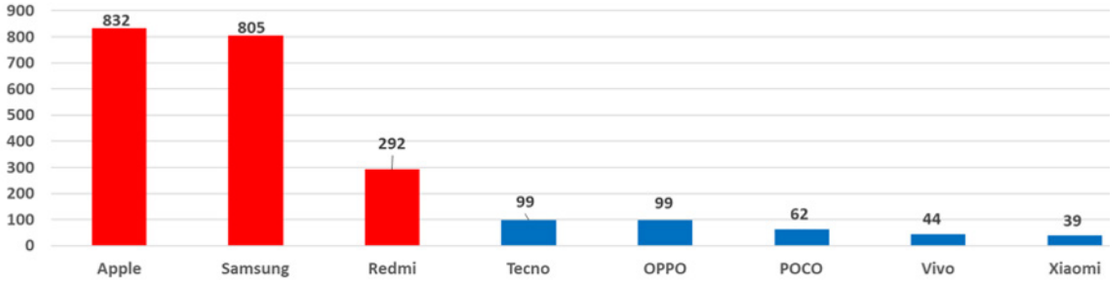
*Figure 4-30 Quarterly Mobile Investment, Million ₺*




## 4.9 MOBILE DEVICE REGISTRATION SYSTEM

Figure 4-31 shows the number of devices registered to the Mobile Device Registration System (MDRS) through import and manufacturing in the second quarter of 2026.

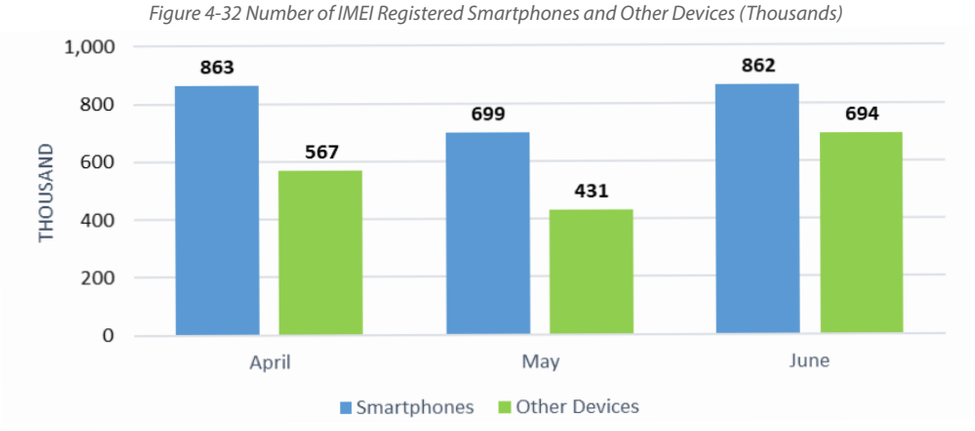
*Figure 4-31 Number of IMEI Registered Mobile Devices by Brands (Thousand)*




In the second quarter of 2026, more than 2.5 million mobile devices were registered, and approximately 75.9% of these devices were produced by Apple, Samsung and Redmi brands.

Figure 4-32 shows the types of imported and manufactured devices registered. Most of the registered devices are smartphones.

*Figure 4-32 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 June, there are 206 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 second quarter of 2026, the total fiber length of the operators is approximately 720,000 km, of which 252,000 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 |
|---|---|---|---|---|---|
| **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 |
| **2025-4** | 637,091 | 43,433 | 248,908 | 431,616 | 680,524 |
| **2026-1** | 653,967 | 42,640 | 249,741 | 446,866 | 696,606 |
| **2026-2** | 677,245 | 42,766 | 251,836 | 468,176 | 720,012 |

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*

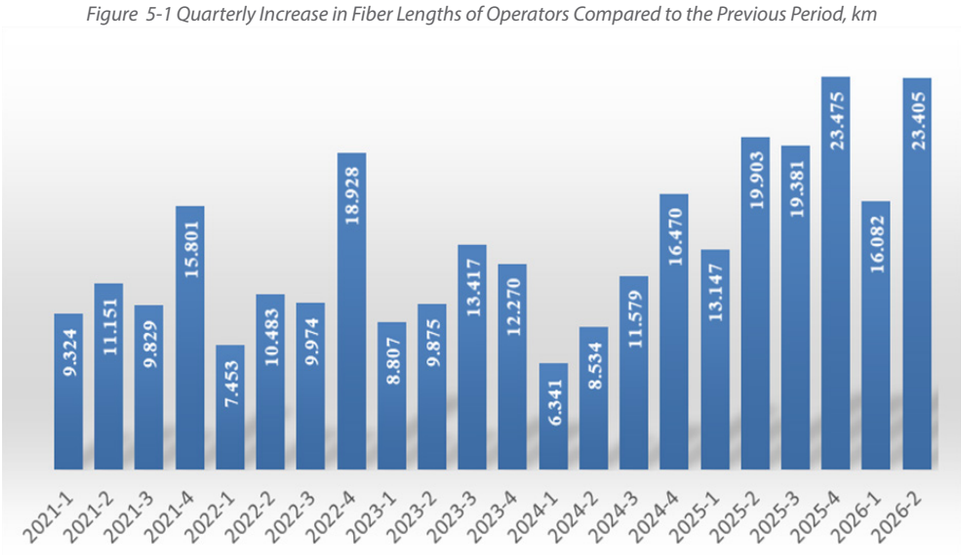



Table 5-2 presents the revenue data for the infrastructure operator group. In the second quarter of 2026, the total revenue generated by operators from infrastructure services amounted to 5,197 million TRY.

*Table 5-2 Revenues from Alternative Infrastructure Operation Services*

| Period | Revenue, ₺ |
|---|---|
| **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 |
| **2025-4** | 4,897,210,496 |
| **2026-1** | 4,953,677,743 |
| **2026-2** | 5,197,011,054 |

## 5.2 CABLE BROADCASTING SERVICES

As of Q2 2026, 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 1,570,616 cable TV subscribers as of the second quarter of 2026. Among the other authorized operators providing CBS, TTNet and Superonline offer IPTV services only to 1,236,883 and 1,429,925 subscribers respectively (Table 5-3).

*Table 5-3 Cable Broadcasting and IPTV Services*

| Period | Number of Cable TV Subscribers | Number of IPTV Subscribers |
|---|---|---|
| **2025-2** | 1,501,492 | 2,559,553 |
| **2025-3** | 1,535,742 | 2,583,480 |
| **2025-4** | 1,557,643 | 2,610,764 |
| **2026-1** | 1,571,213 | 2,625,932 |
| **2026-2** | 1,570,616 | 2,666,808 |

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 0.87% compared to the previous three-month period, reaching 1,570,616.

The trend of the number of IPTV subscribers is shown in Table 5-3, and the number of IPTV subscribers increased by approximately 1.56% compared to the previous three-month period, reaching 2,666,808.

## 5.3 SATELLITE COMMUNICATION SERVICES

Operators authorized to provide satellite communication services within the scope of the notification provide services to 14,699 subscribers via satellite ground stations as of the second quarter of 2026.

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 1,855 million ₺ for the second quarter of 2026.

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

| Period | Number of Subscribers | Revenue, ₺ |
|---|---|---|
| **2025-2** | 15,823 | 1,217,037,507 |
| **2025-3** | 16,465 | 2,124.982,805 |
| **2025-4** | 16,013 | 2,620,647,676 |
| **2026-1** | 14,632 | 1,898,703,297 |
| **2026-2** | 14,699 | 1,855,013,324 |

When the market shares of operators providing services in this field are examined according to the number of subscribers, it is seen that Türksat has a market share of 39.7%, followed by with Eser Telekom 36.7%, Superonline with 9.1%, ICT Telekom with 8% and İşNet with 5,3%, respectively.

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

| Operator | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| **Eser Telekom** | 42.6 | 40.9 | 42.0 | 39,7 | 39,7 |
| **Türksat** | 36.3 | 35.1 | 36.2 | 36,9 | 36,7 |
| **Superonline** | 8.6 | 8.9 | 8.5 | 9 | 9,1 |
| **ICT Telekom** | 5.9 | 8.6 | 7.2 | 8 | 8,0 |
| **İşNet** | 5.4 | 5.2 | 4.9 | 5,3 | 5,3 |
| **Others** | 1.2 | 1.3 | 1.2 | 1,1 | 1,1 |

## 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*

| | | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|---|
| **DİGİTAL PLATFORM** | Number of Users | 2,735,100 | 2,944,569 | 2,908,133 | 2,898,589 | 2,916,816 |
| **ANDROMEDA TV** | Number of Users | 791,448 | 766,423 | 739,135 | 724,200 | 709,868 |
| **TTNET AŞ** | Number of Users | 428,222 | 405,618 | 373,407 | 351,987 | 342,448 |

* *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, ₺*

| | 2025-2 | 2025-3 | 2025-4 | 2026-1 | 2026-2 |
|---|---|---|---|---|---|
| **Total Revenues** | 230,171,573 | 263,580,107 | 342,776,154 | 306,150,576 | 400,748,234 |

## 5.5 GLOBAL MOBILE PERSONAL COMMUNICATIONS BY SATELLITE (GMPCS) SERVİCES

As of the second quarter of 2026, 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 second quarter of 2026, the total number of subscribers in this service group is 6,199. The revenue for GMPCS services was approximately 45.2 million ₺ during this period.

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

| Period | Number of Subscribers | Revenue, ₺ |
|---|---|---|
| **2025-2** | 6,003 | 53,312,005 |
| **2025-3** | 6,299 | 41,316,139 |
| **2025-4** | 6,292 | 45,263,224 |
| **2026-1** | 6,288 | 42,914,355 |
| **2026-2** | 6,199 | 45,210,279 |

When we look at the market shares of operators operating in this field according to the number of subscribers; Teknomobil's market share 38.1%, Aselnet's market share 32.1%, Icom's market share 22.8% and Mobilkom's market share is 4.4% (Table 5-9).

*Table 5-9 Market Shares of GMPCS Operators, %*

| Operator | 2025-2 | 2025-3 | 2025-4 | 2026-1 | Operator | 2026-2 |
|---|---|---|---|---|---|---|
| **Teknomobil** | 42.9 | 39.9 | 39.1 | 37.9 | Teknomobil | 38.1 |
| **Aselnet** | 24.1 | 28.5 | 29.8 | 31.4 | Aselnet | 32.1 |
| **Icom** | 23.8 | 22.8 | 23.2 | 22.4 | Icom | 22.8 |
| **ClickNet** | 5.9 | 5.6 | 4.7 | 4.7 | Mobilkom | 4.4 |
| **Others** | 3.3 | 3.2 | 3.2 | 3.6 | Others | 2.6 |

## 5.6 DIRECTORY ASSISTANCE SERVICES

As of Q2 2026 seven operators authorized to provide directory assistance services are actively operating. In the second quarter of 2026 the total number of calls made by these operators was 175,097 and the total call duration was 300,429 minutes. The quarterly revenue of directory assistance providers was approximately 32 million TRY (Table 5-10).

*Table 5-10 Directory Assistance Services*

| Period | Number of Calls | Call Duration (Minutes) | Revenue (₺) |
|---|---|---|---|
| **2025-2** | 244,772 | 406,526 | 29,149,239 |
| **2025-3** | 238,721 | 398,051 | 31,353,394 |
| **2025-4** | 217,397 | 359,666 | 42,053,722 |
| **2026-1** | 176,755 | 296,669 | 44,960,557 |
| **2026-2** | 175,097 | 300,429 | 31,767,671 |

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 90.94% based on call numbers.

*Table 5-11 Market Shares of Directory Assistance Operators*

| Operators | % | Average Call Duration (minutes) |
|---|---|---|
| **BN Telekom (11880 - 11888)** | 90.94 | 1.6 |
| **Callturk (11858)** | 5.82 | 4.1 |
| **Mobilisim Iletisim (11877)** | 2.07 | 0.8 |
| **Pluss Telekom (11899)** | 0.73 | 0.2 |
| **118 Telekomunikasyon (11834)** | 0.37 | 0.5 |

## 5.7 PUBLIC ACCESS MOBILE RADIO (PAMR) SERVICES

As of the second quarter of 2026, the number of operators authorized to provide Public Access Mobile Radio (PAMR) Services within the scope of the right of use is 33. The number of subscribers, users and income information of PAMR operators are given in Table 5-12. The total number of subscribers is 2,707, the number of users is 125,681 and the income obtained from these services is approximately 97,5 million ₺.

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

| Period | Number of Subscribers | Number of Users | Revenue, (₺) |
|---|---|---|---|
| **2025-2** | 2,764 | 126,898 | 76,099,234 |
| **2025-3** | 2,740 | 126,064 | 76,108,805 |
| **2025-4** | 2,746 | 126,525 | 95,163,438 |
| **2026-1** | 2,623 | 123,725 | 86,457,110 |
| **2026-2** | 2,707 | 125,681 | 97,534,895 |