

Europe 2020 and Turkey 2023

Establishing Digital Agenda of Tomorrow

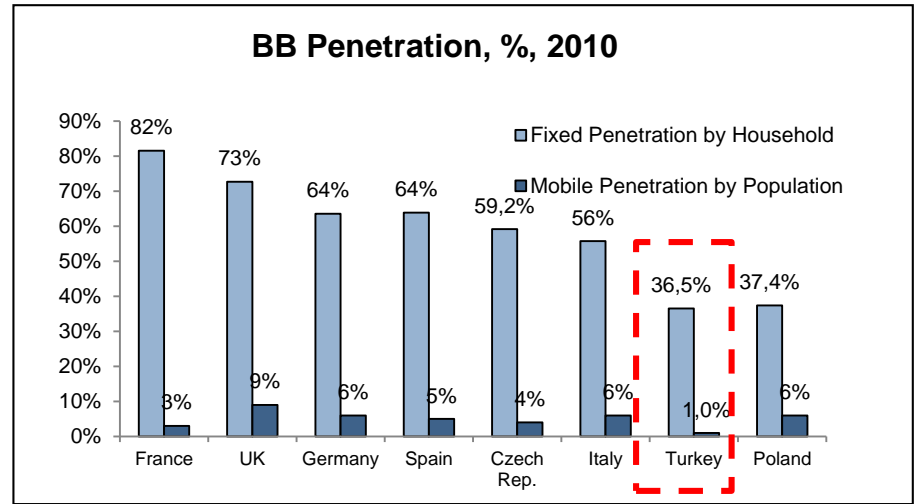
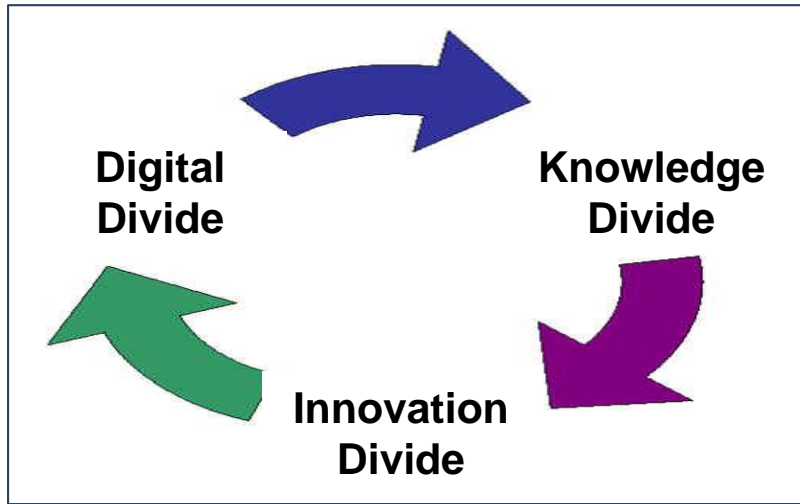
Türk Telekom
Celalettin Dinçer
Istanbul, November 2010



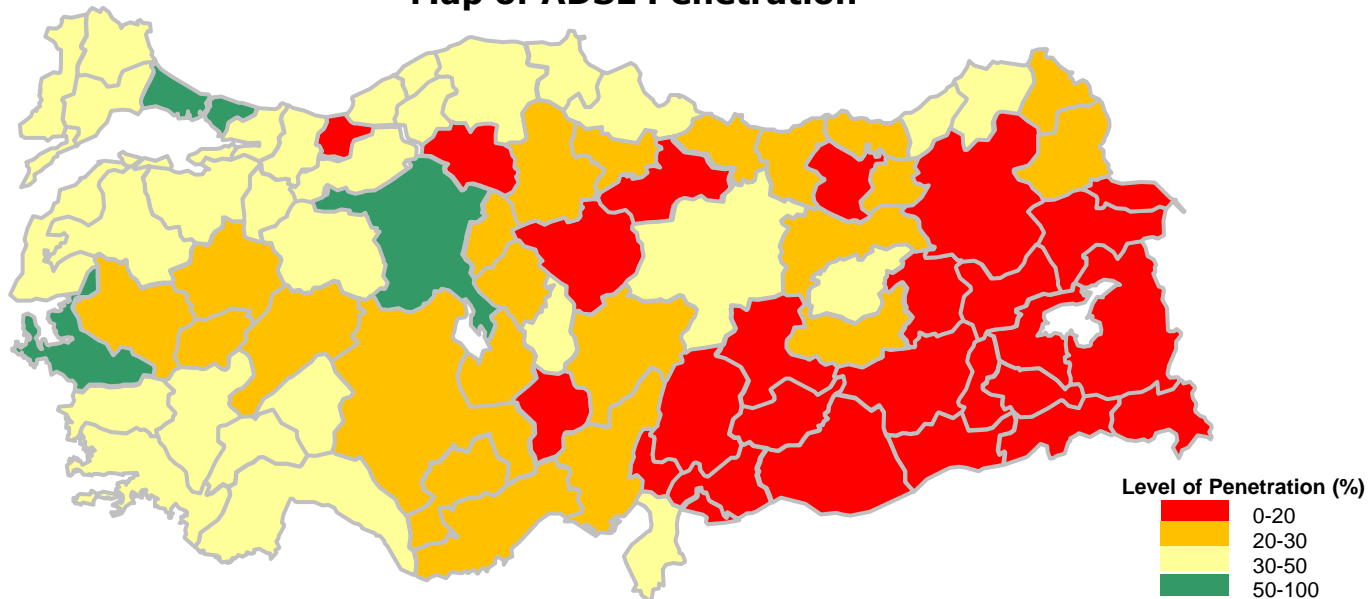
Agenda

- Digital Divide
- Market Overview
- Investment
- Vertical Focus
- Summary

The key parameter to decrease Digital divide is to increase BB Penetration

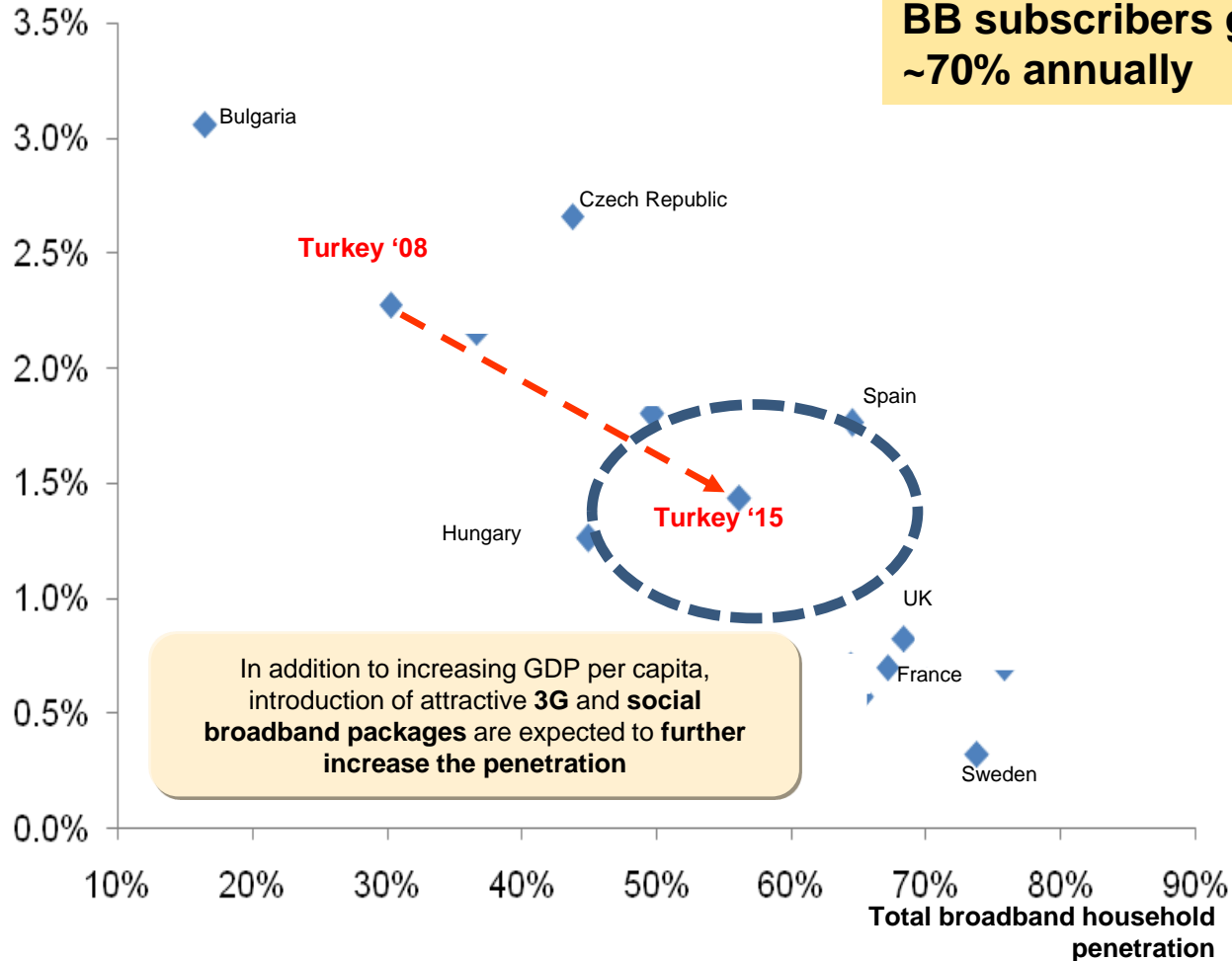


Map of ADSL Penetration



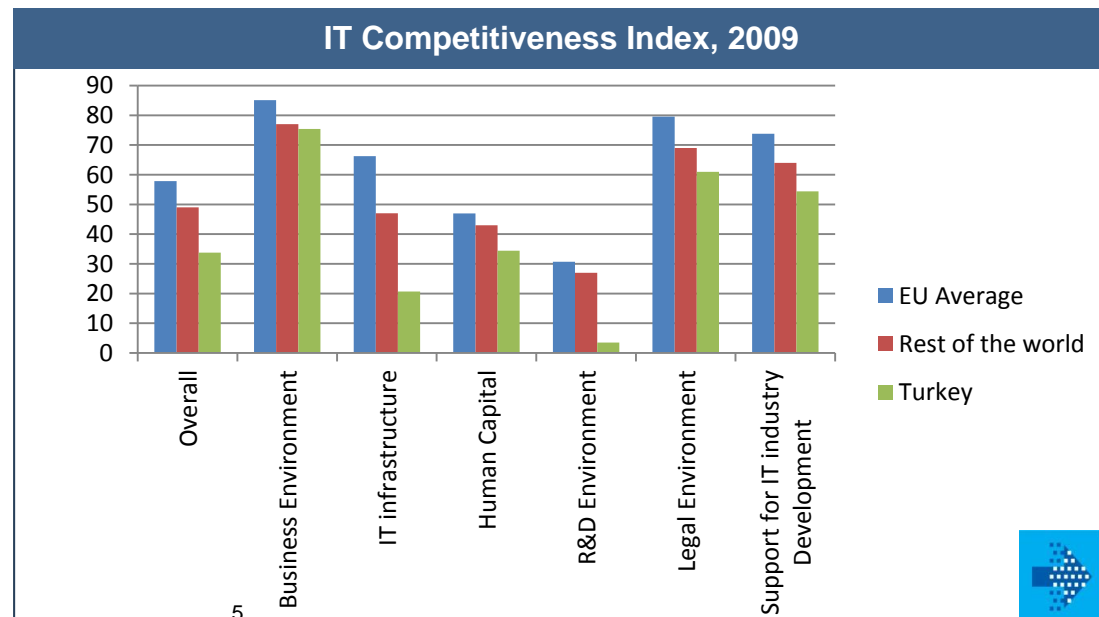
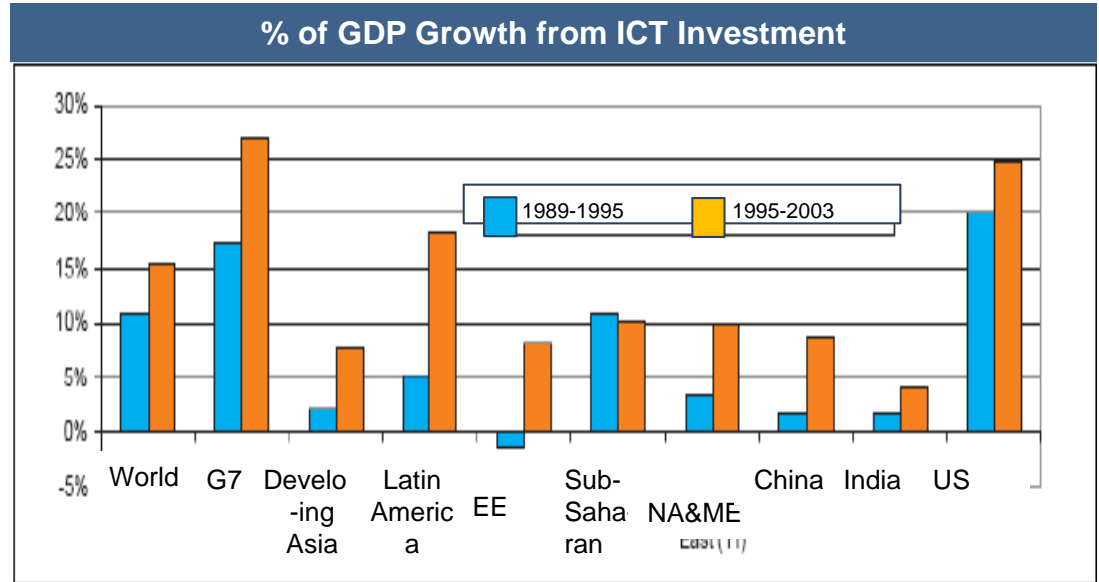
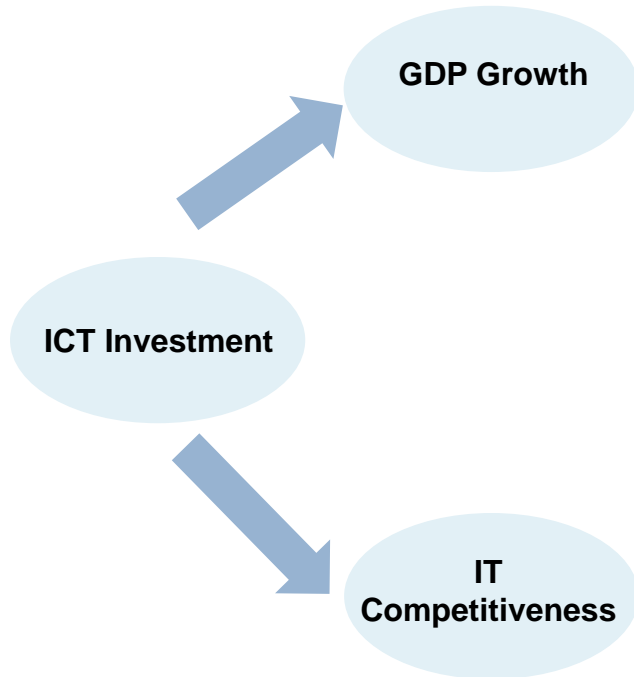
Strong growth in Turkish broadband market

Cost of cheapest BB access / GDP per capita, 2008

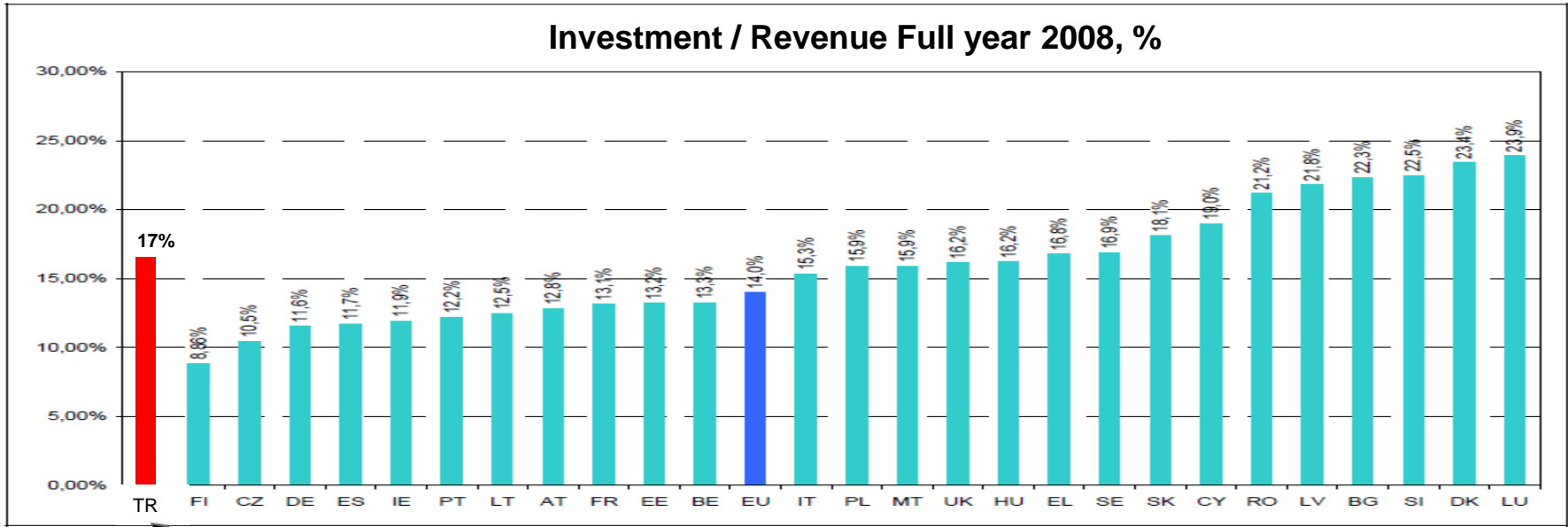


* Penetration is calculated based on substitute mobile broadband subscribers
 Source: Analysys Mason, Informa, TT Business Plan, Strategy team analysis

ICT investment as a significant impact on GDP growth and IT competitiveness

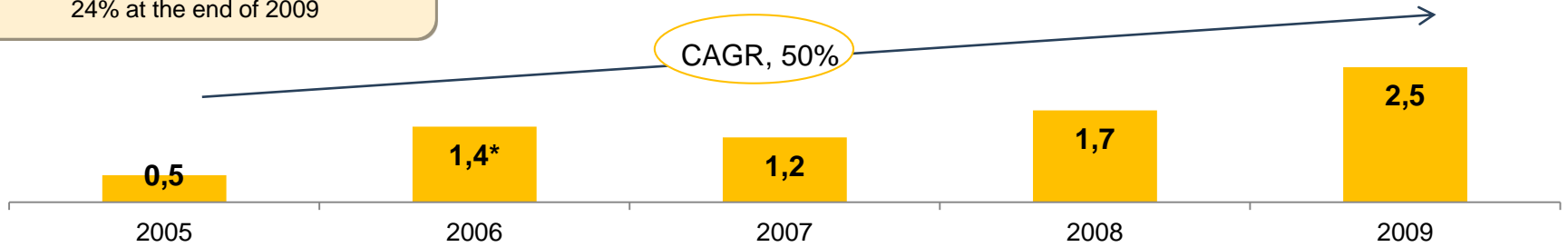


Turkey telecom sector investment ratio is higher than EU Average



This ratio is only **TT Group** investment amount over revenue and it increases to 24% at the end of 2009

TT Group Investment, Bln TL

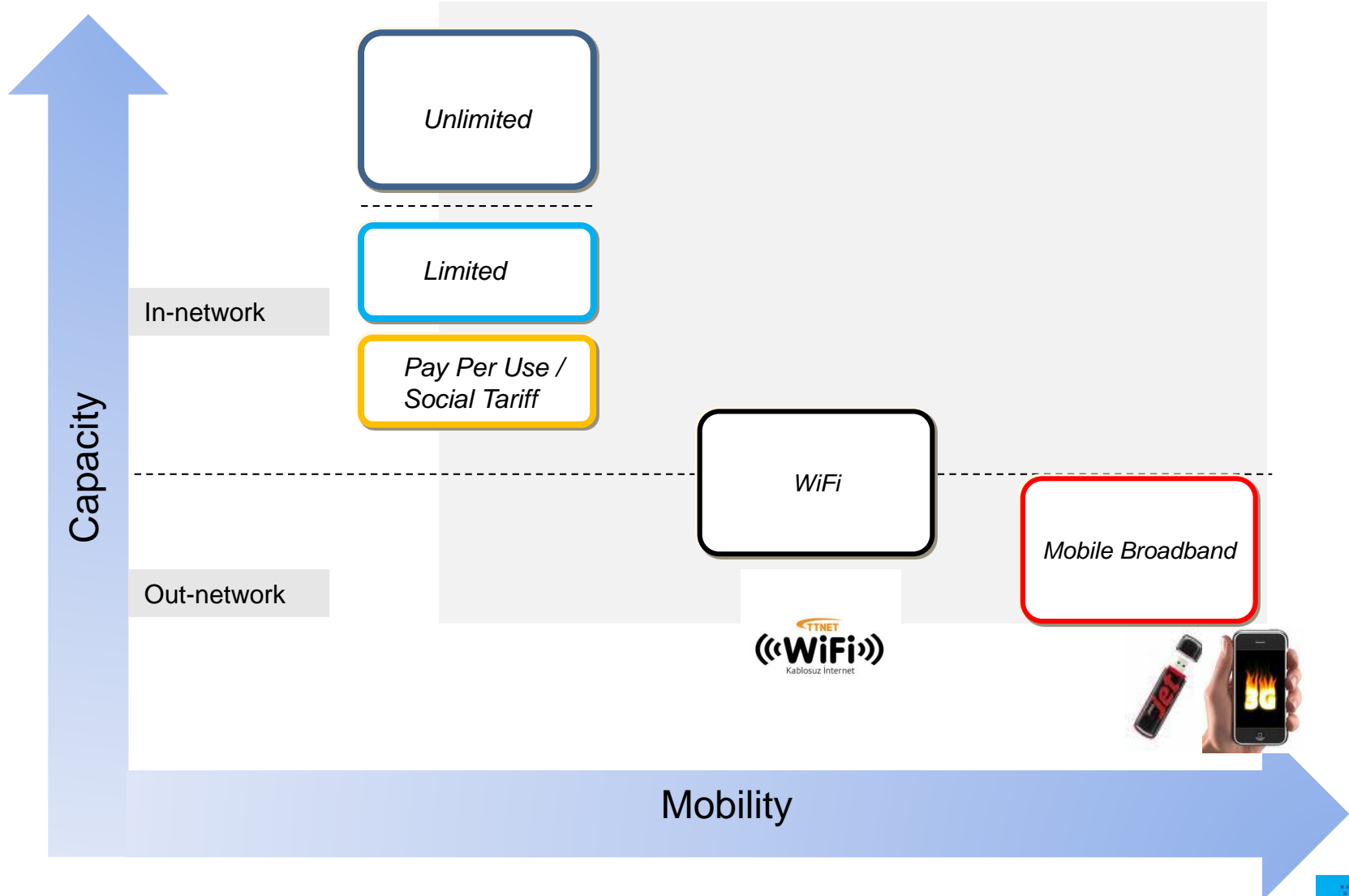


TT Group will continue to invest in its network and infrastructure, as well as verticals and social responsibility projects

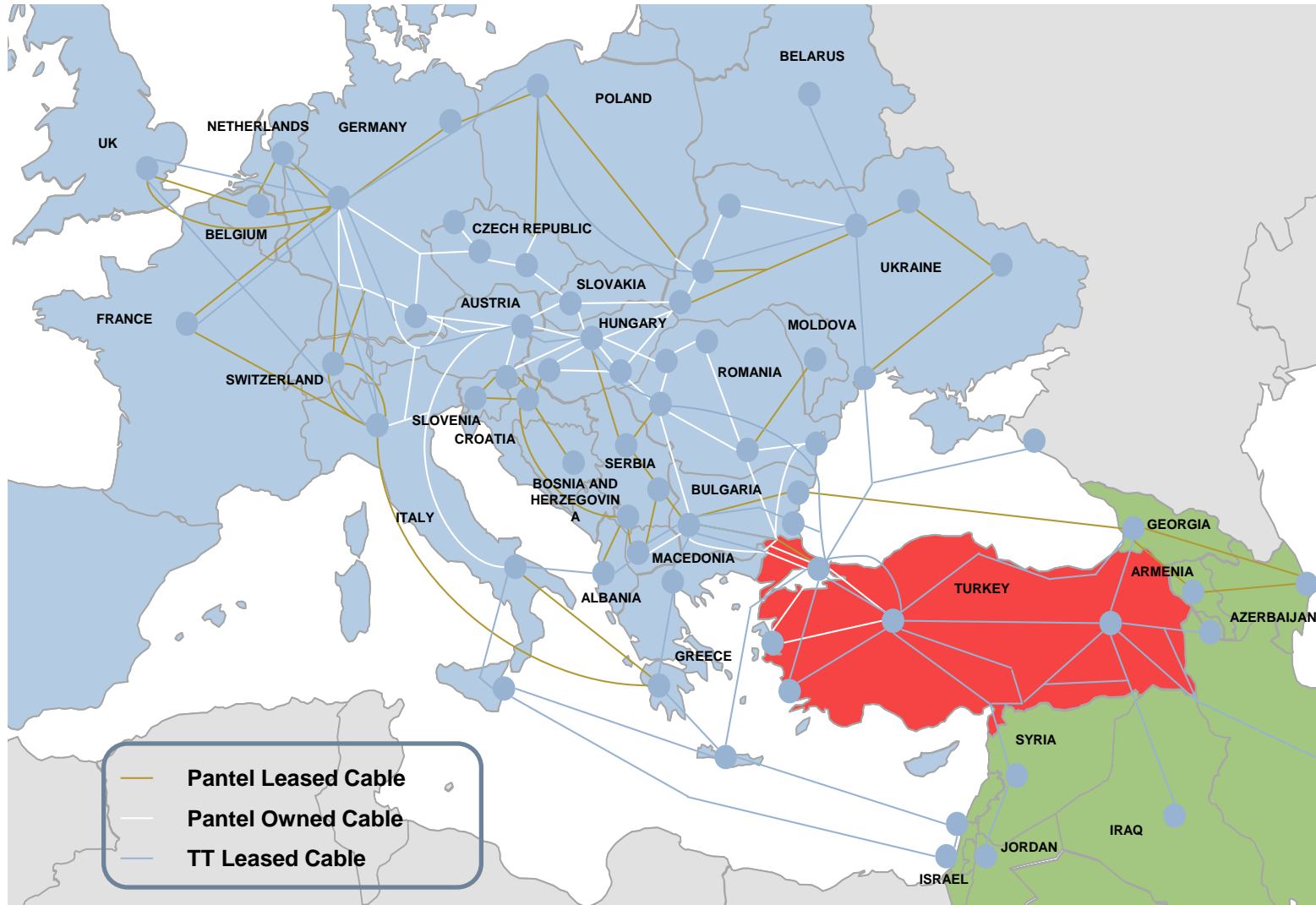
*: Includes Avea equity acquisition worth 738 mn TL

Source: EU Commission, TT Investor Relations

We will provide internet anywhere, anytime

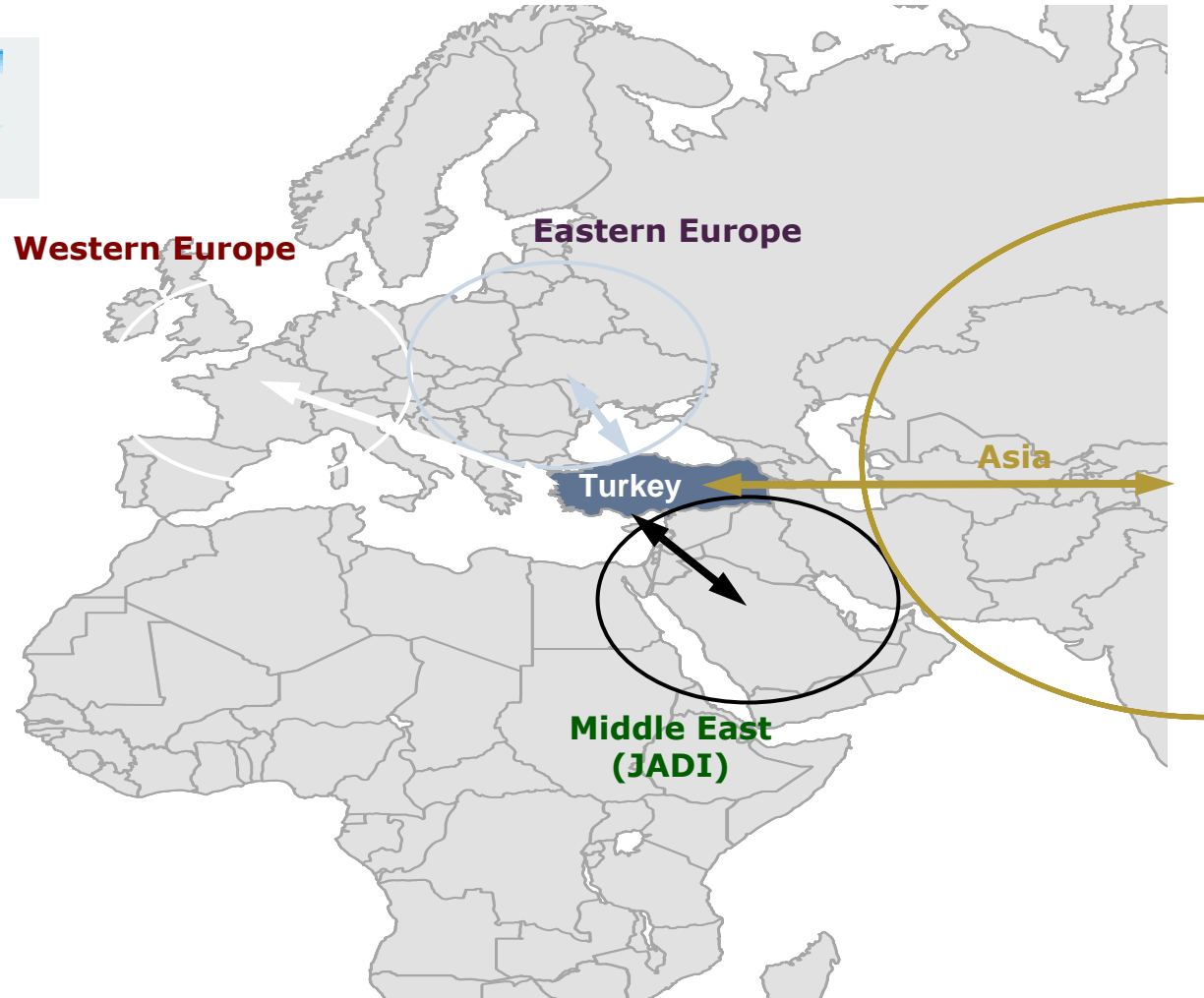


TT has proprietary network in CEE/SEE, with huge potential given Turkey's strategic location



TT is perfectly located to terminate its data traffic for the high growth data markets

Pantel accelerates TT's international wholesale strategies and helps the focus to expand from East to West



Strategy around Digital Life: Vertical Focus



We will contribute to the digital agenda by fostering knowledge and innovation based growth in Turkey

Growth based on knowledge and innovation

- Innovation
- Education
- Digital society

An inclusive high-employment society

- Employment
- Skills
- Fighting poverty

Green growth: a competitive and sustainable economy

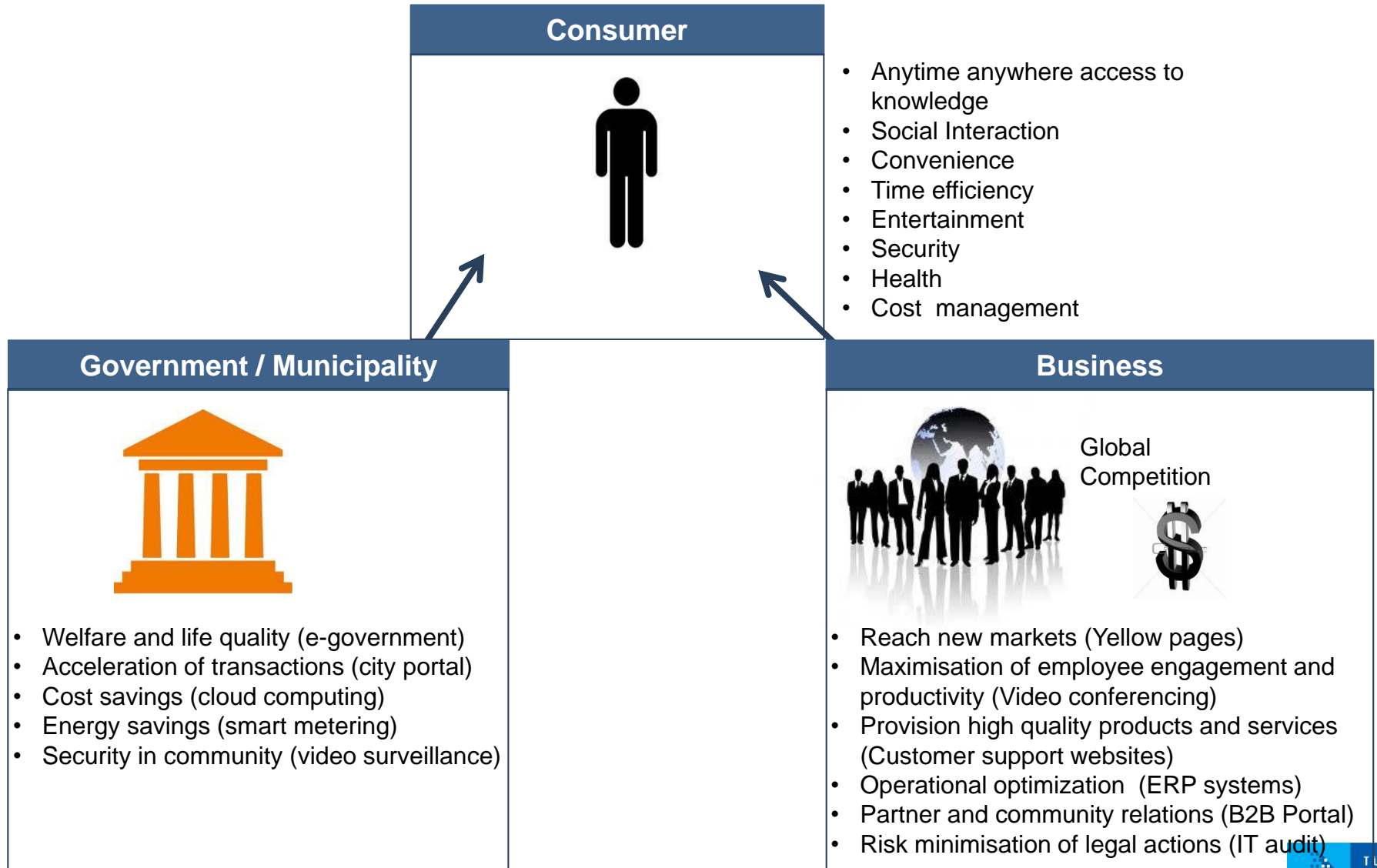
- Combating climate change
- Clean and efficient energy
- Competitiveness

Thank You

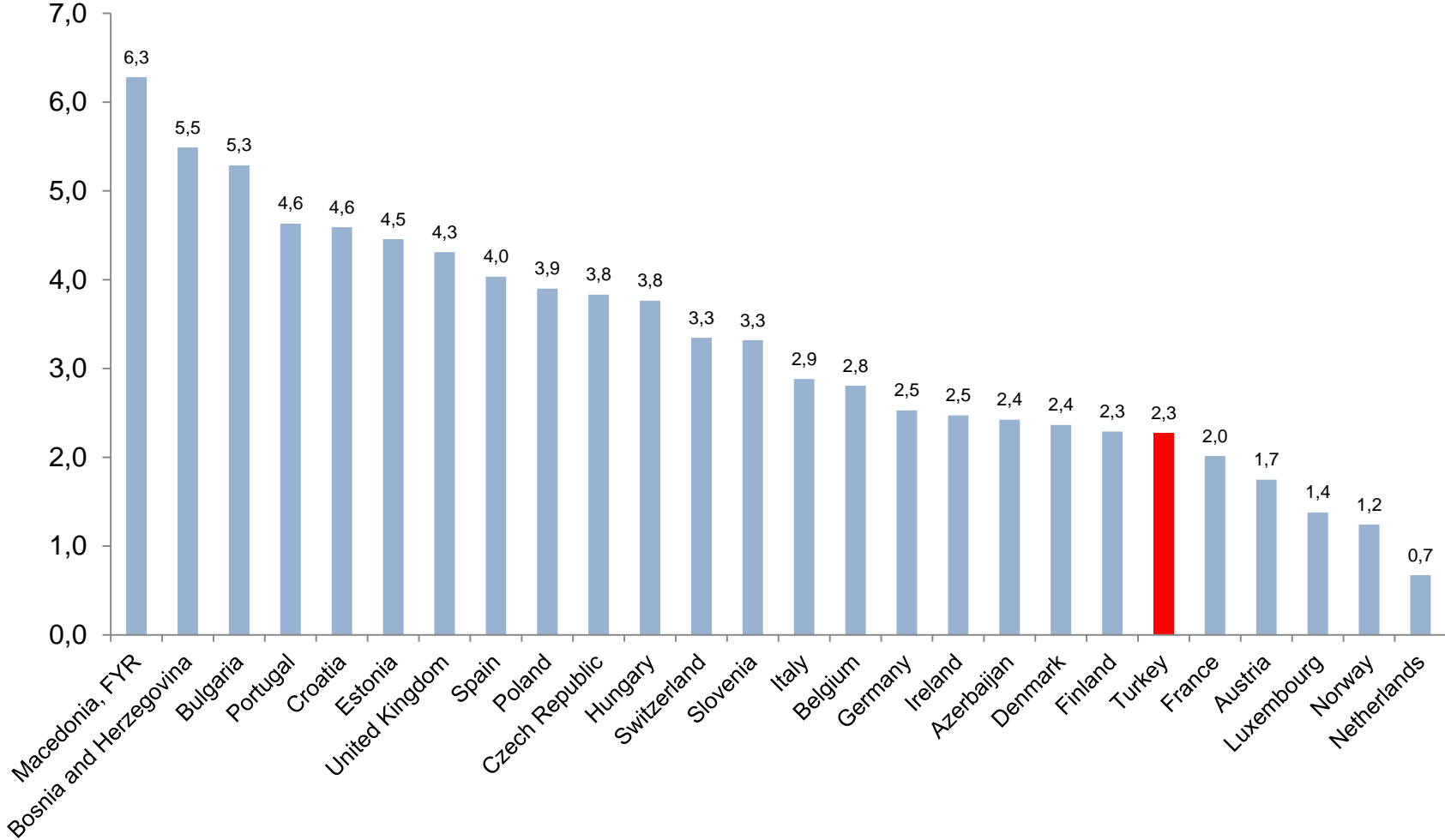
Questions?

Back up

Businesses and Governments capture consumer needs and competitive advantage through ICT services

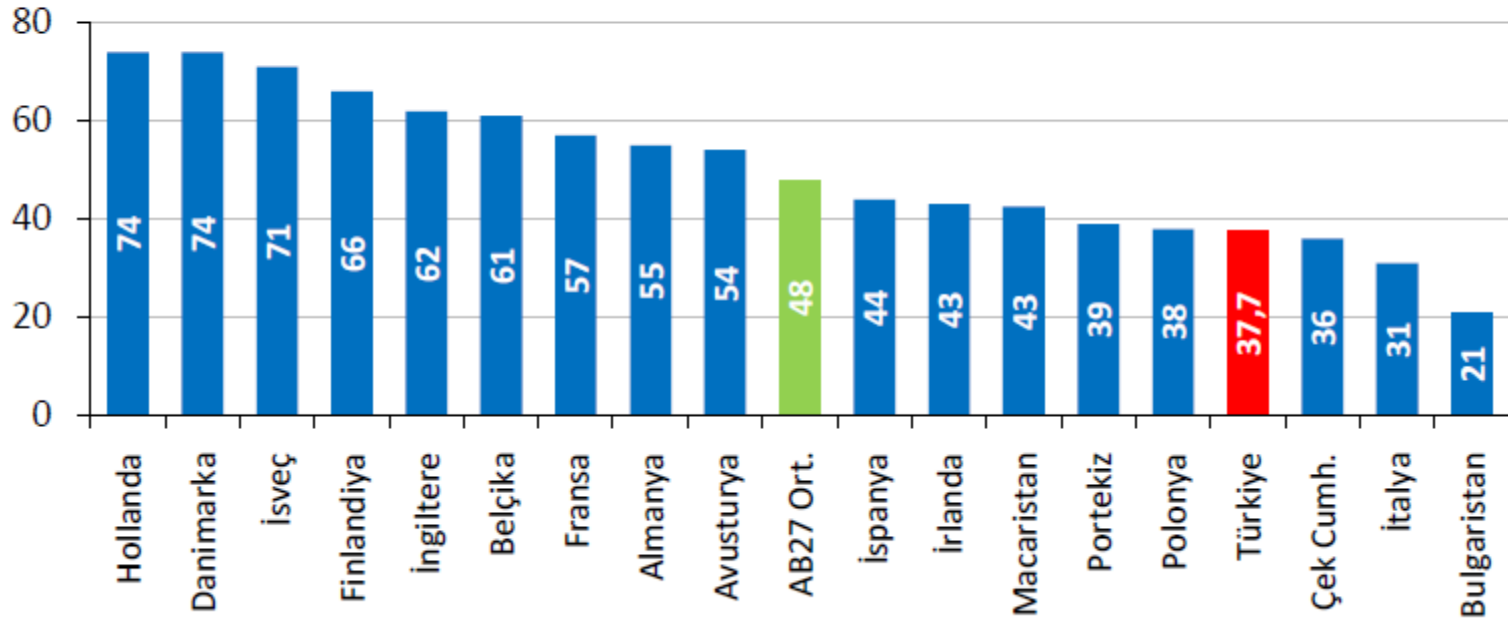


Telecom revenue over GDP

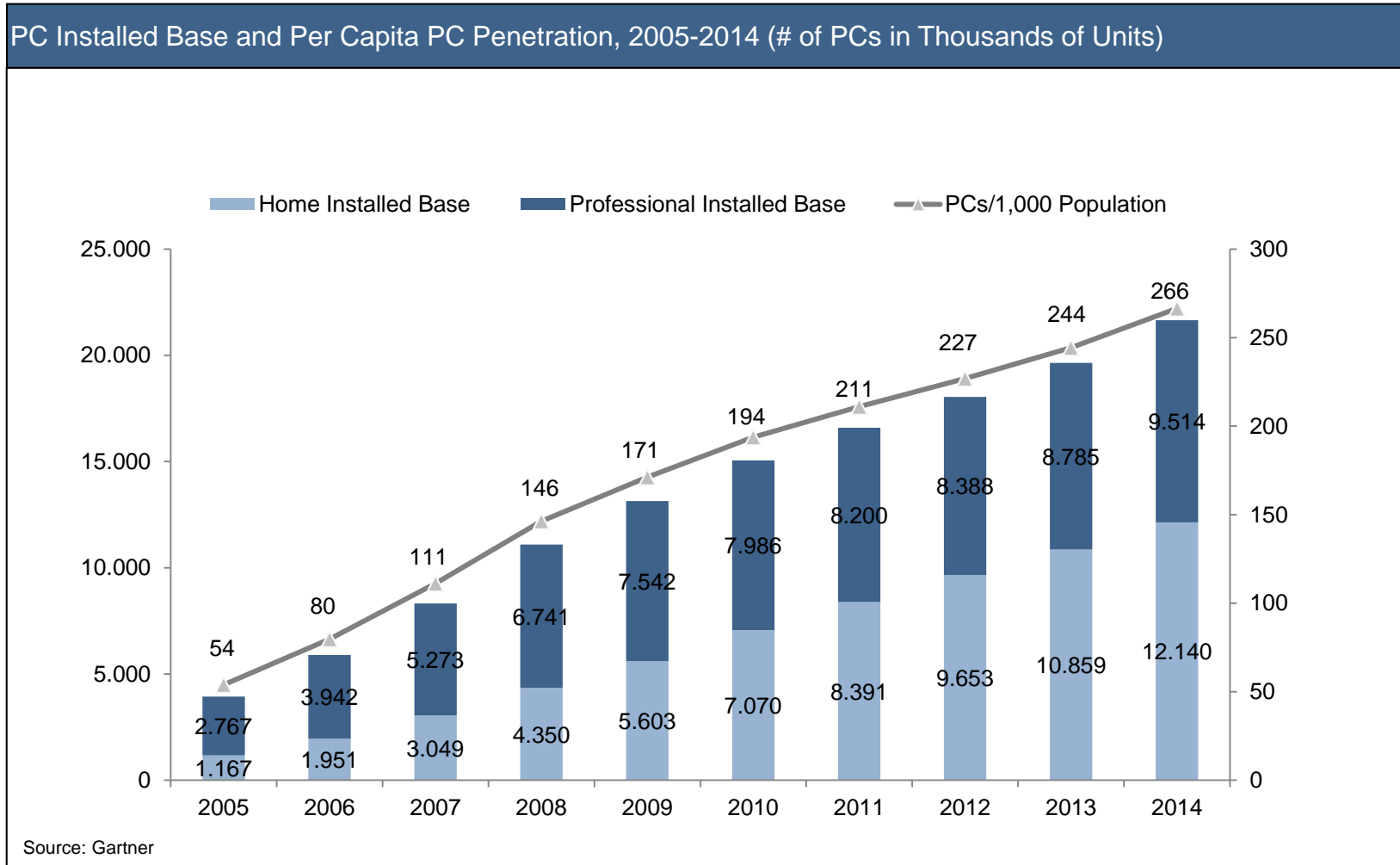


Broadband Penetration – Turkey and EU

Fixed Broadband Household ,Penetration (%), Q3 2010



PC/Laptop Penetration



Telecom Revenues (Bln TL)



Telecom Investments (Bln TL)

