



# Turk Telekom's strategy and activities about broadband infrastructure

10.12.2012

# Turk Telekom Group Overview

Türk Telekom Group is Turkey's leading integrated **telecommunications and technology services** provider.

Offering a broad portfolio of services **as fixed telephony, mobile services, data, internet, content and innovative convergence technologies**

# Turk Telekom Group from 2005 to today...



2006

**TTNET** founded to deliver ISP services  
Turk Telekom's share in **AVEA** raised to 81% by buying 40,56% more of its shares

2008

Turk Telekom became a listed company at IMKB (ISE) after Turkish Treasury sold 15% its shares via **Initial Public Offering**

2010

Wholesale data and capacity provider **Pantel International** acquired  
**JADI LINK**

2012

Commercial launch of **FTTH/B services** nationwide

2005  
**Privatization**

2007

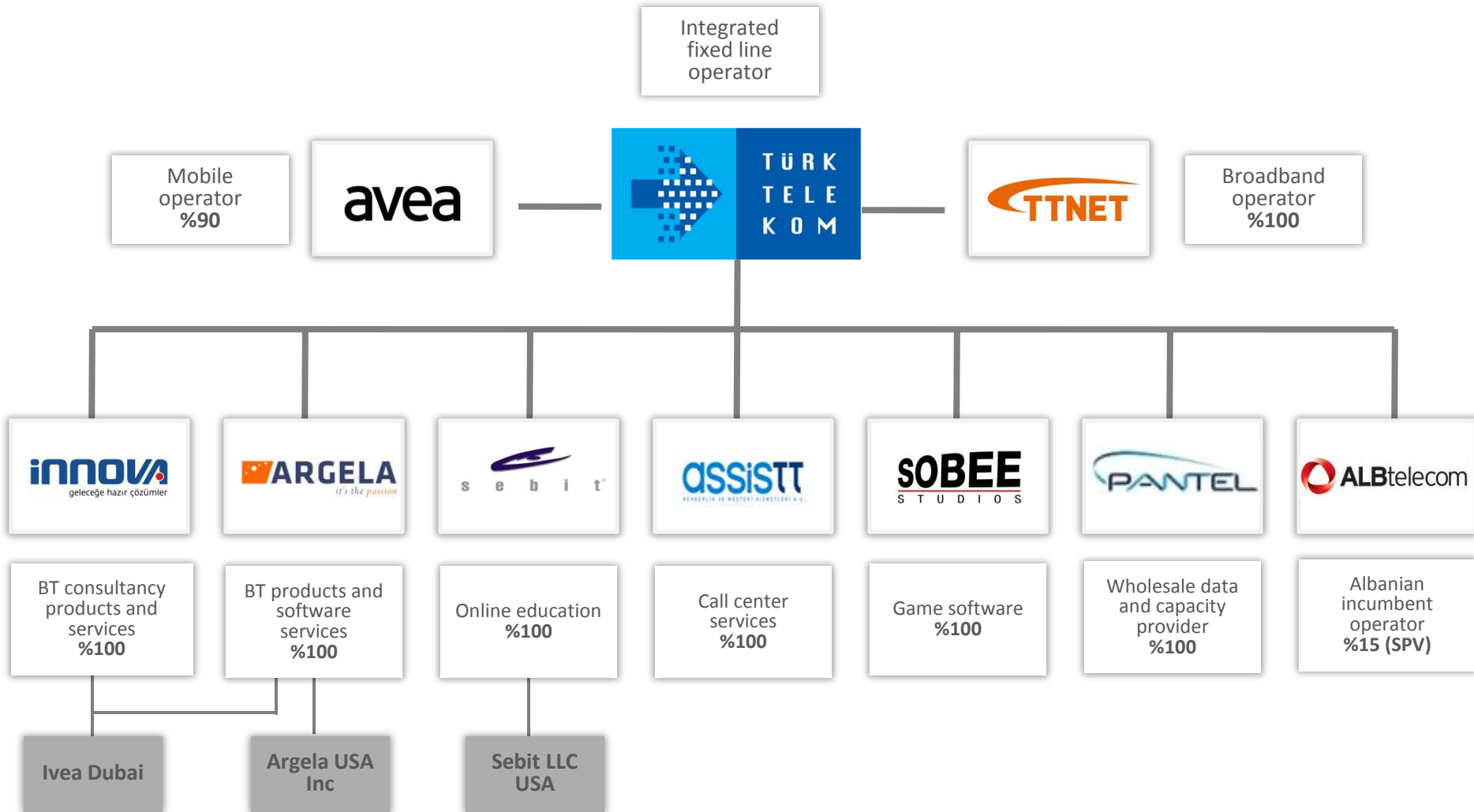
**Altelecom**'s 15,2% minority share purchased  
Convergence technologies company **Argela** acquired  
Convergence technologies company **Innova** acquired  
**AssisTT** founded to provide call center services  
Online education software company **Sebit** acquired

2009

Online games company **Sobee** acquired

2011

Started providing GSM services in Germany with **TT Mobile** brand



**14,5 million**  
fixed lines

Fiber length  
**165.000 km**  
in Turkey

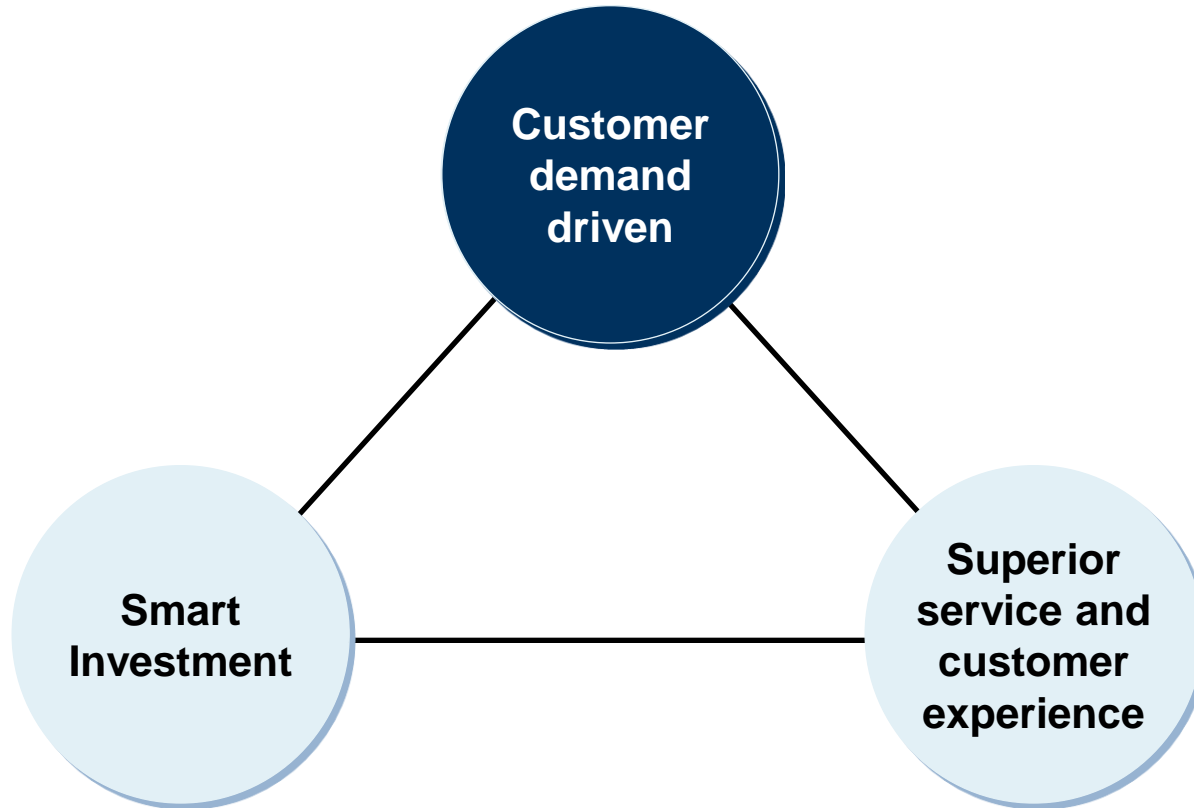


**24 000+**  
employees

**7 million**  
broadband subscribers

# **Turk Telekom Group's Strategic Approach to Superfast Broadband**

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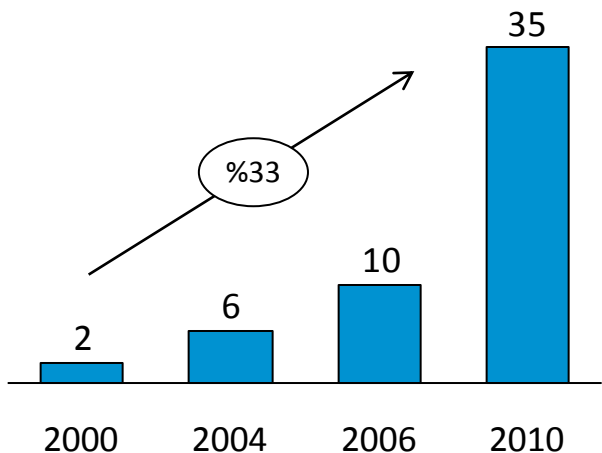




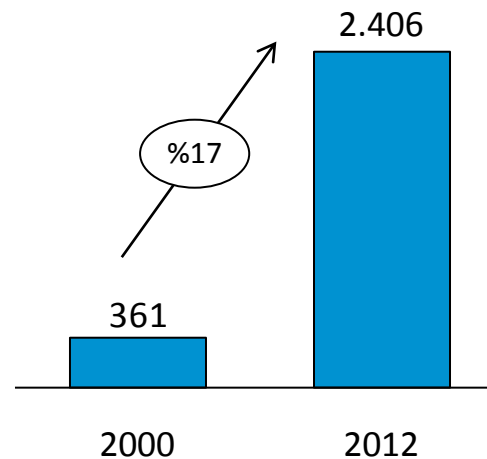
# With the developments in new new users, services and devices broadband usage is rapidly increasing



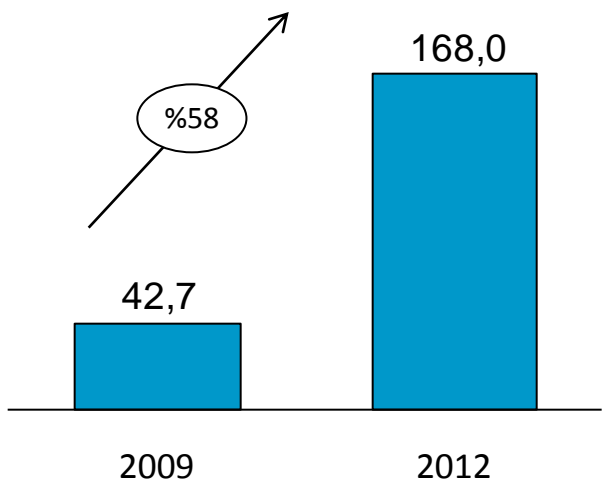
### Turkey Number of Internet Users (millions)



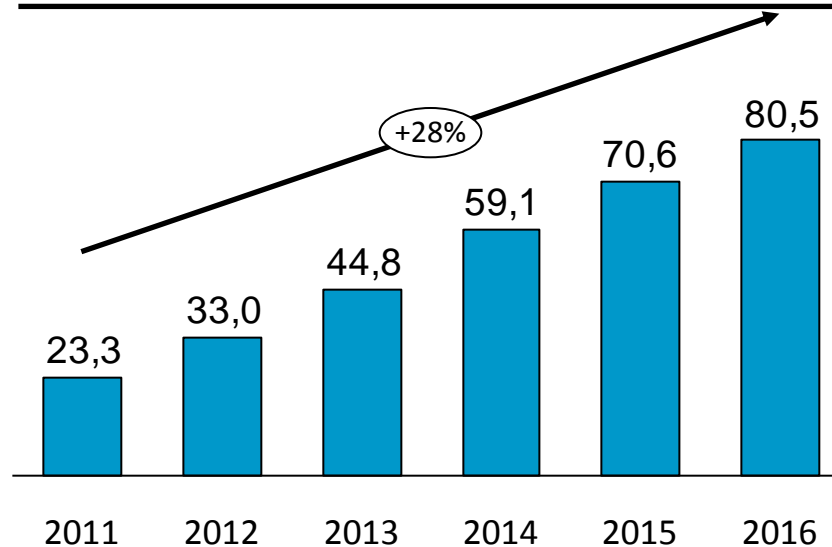
### Global Number of Internet Users (millions)



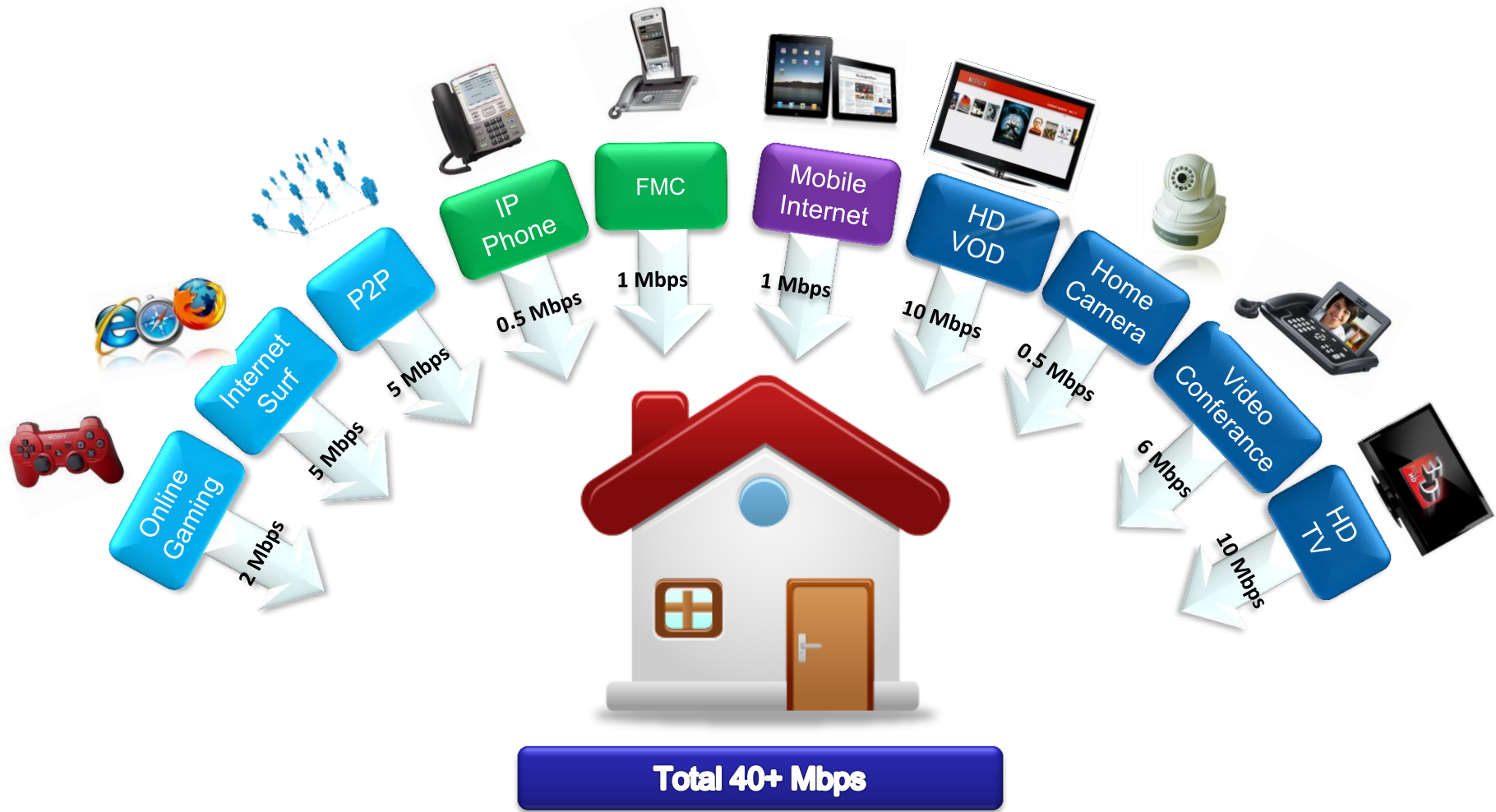
### Turkey ADSL Usage (Mn GB per month)

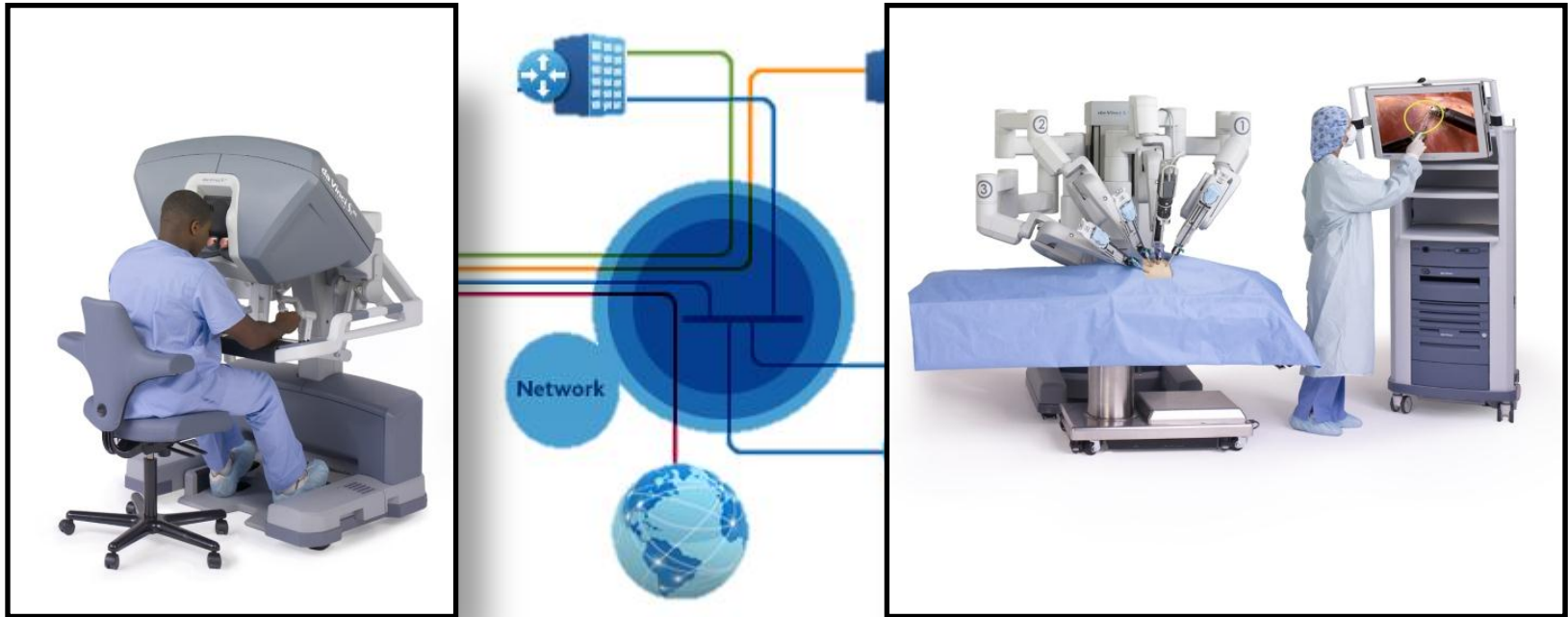


### Global fixed data usage (EB per month)\*



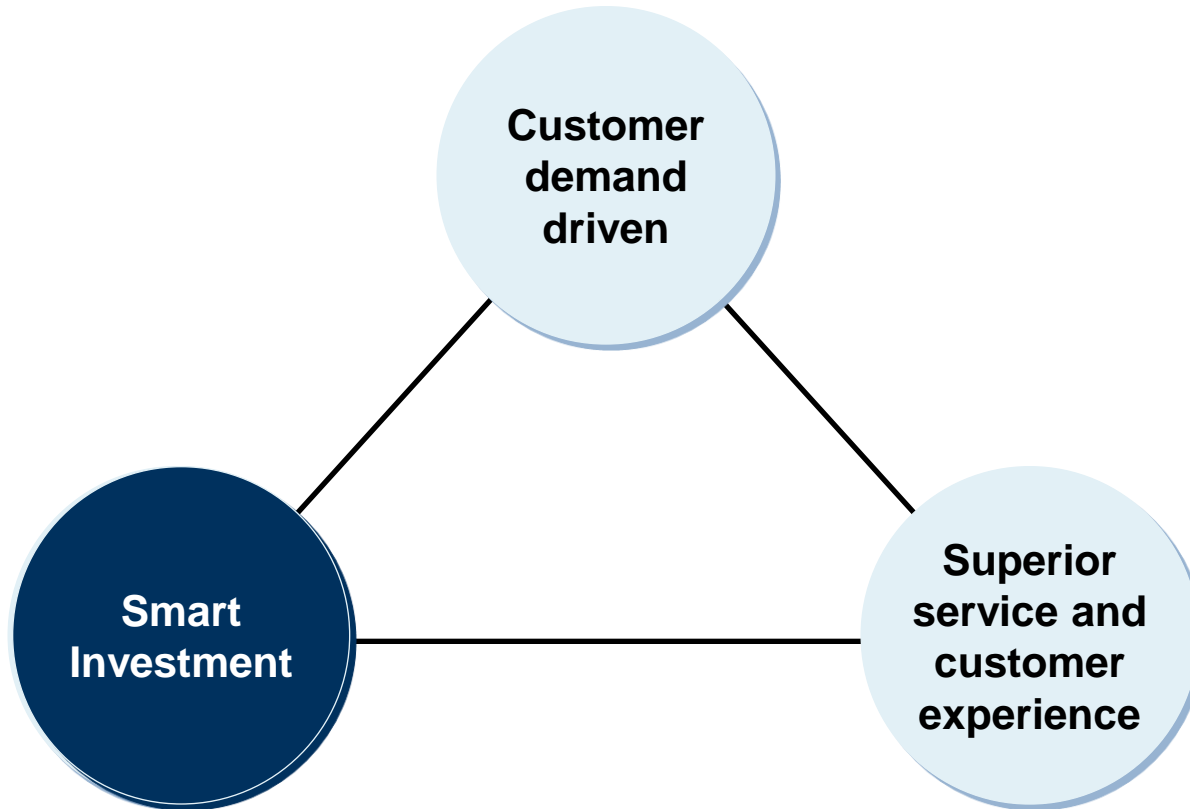
# Broadband usage at home originates from a number of bandwidth-hungry devices these days





**Tele-Surgery**

# Turk Telekom Group's Strategic Approach to Superfast Broadband



# Turk Telekom is best positioned to serve customers needs



National player with strong financials

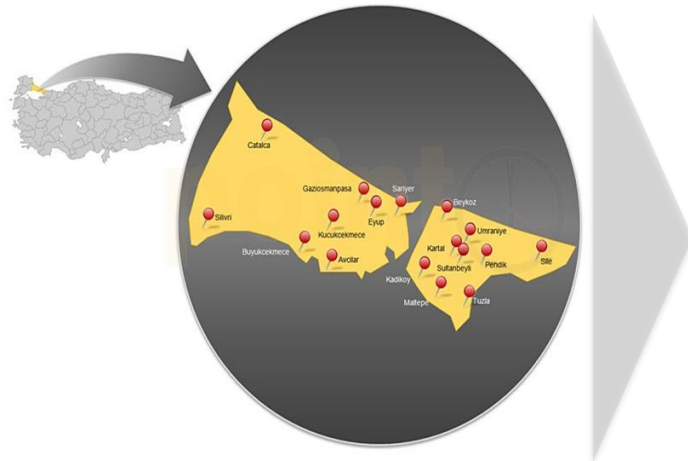
Two nationwide fixed and mobile networks

High resiliency in network and IT



avea

# Turk Telekom is micro planning its investments to match customer needs and to sustain investments



## Commercial Planning

- Customer needs
- Demographics
- Penetration levels
- Household density
- Customer usage
- etc

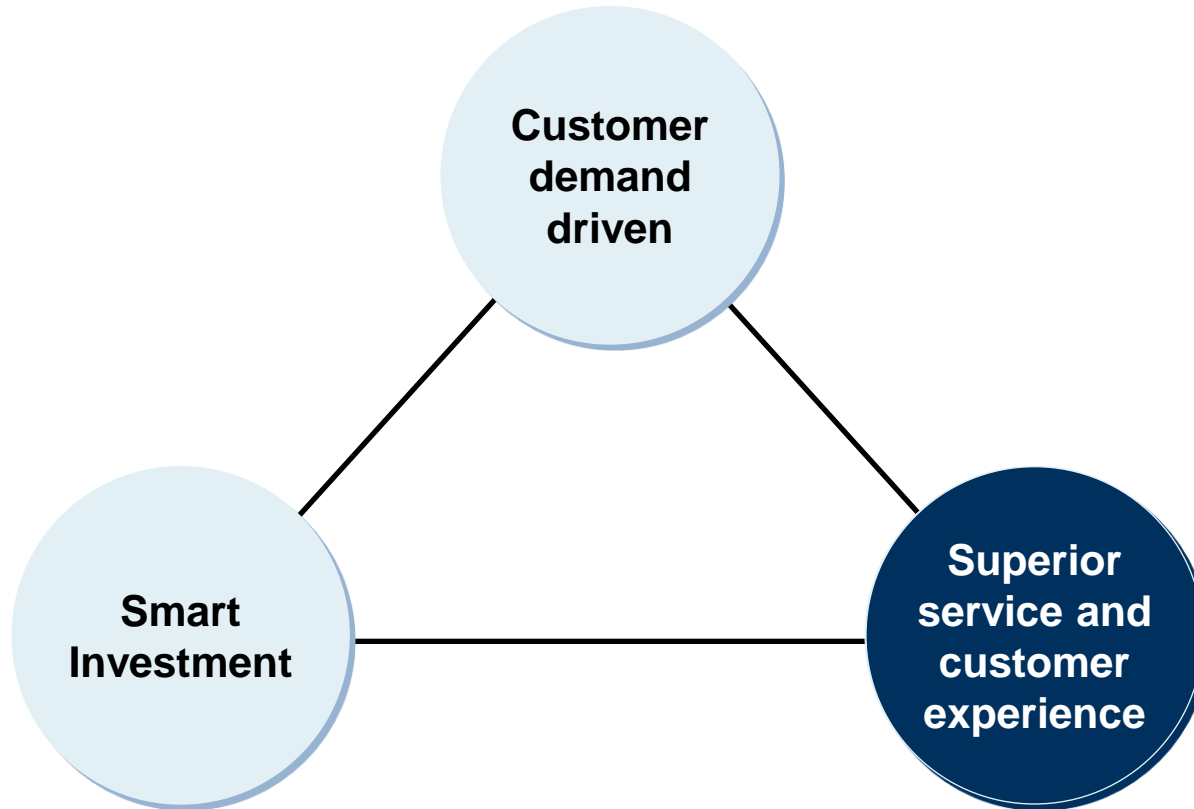


## Technical Planning

- Geography
- Vertical settlement
- Sparsity of buildings
- etc.



# Turk Telekom Group's Strategic Approach to Superfast Broadband



# Turk Telekom focuses on superior service quality and customer experience



## National Presence

- Turk Telekom offices and dealers throughout Turkey cities and most districts
- Infrastructure in even most rural locations
- Advanced technical services teams to solve all problems of the customer



## Tailored propositions for the customers

Bundles consisting of combinations of fixed voice, fixed data, mobile voice, mobile data and TV



«7'den 7'ye»  
Free PSTN calls  
from 7pm to 7am



«Smart Home» bundle  
FV + FBB + IPTV



«Hep Net» bundle  
FBB + MBB + Wi-Fi



# Dreams come true: Value added services further enabled by superfast broadband



OTT, Video on Demand



Social TV, interactivity



IPTV at the center of home entertainment



TV viewing is complemented by smart devices



HD/4K quality



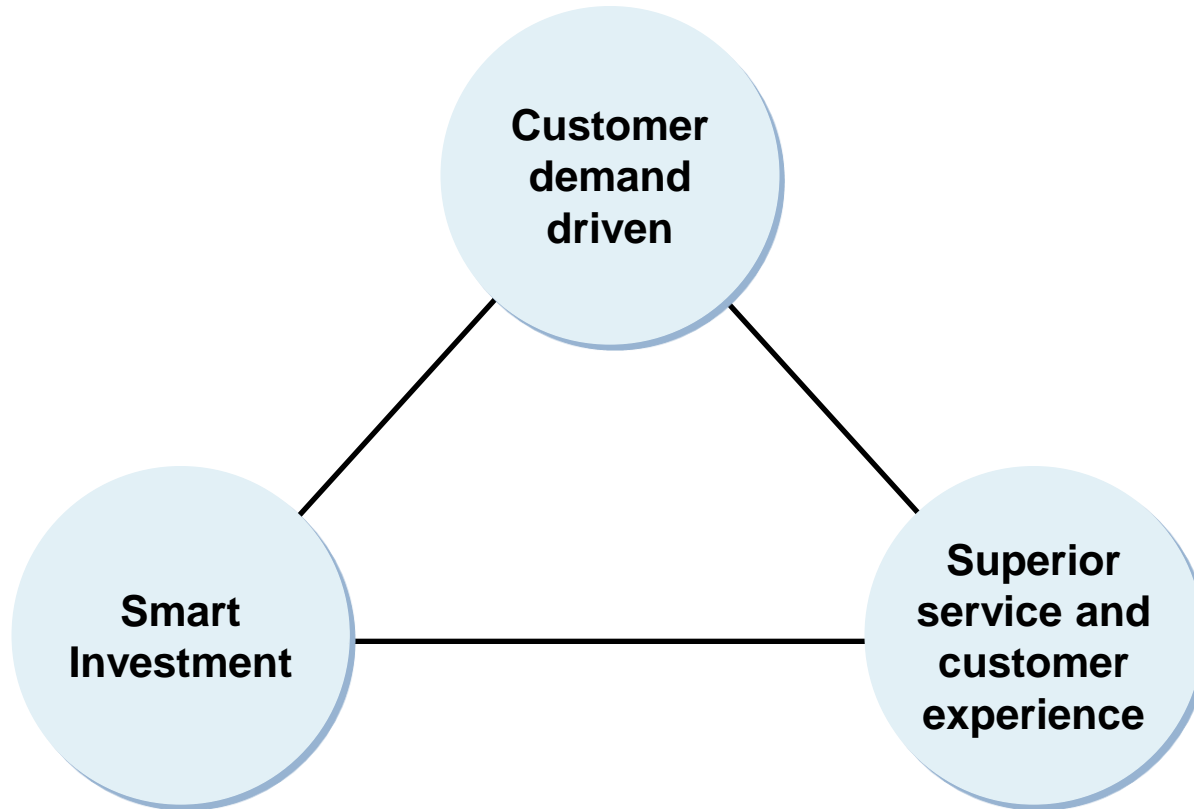
Network storage



Videoconferencing



# Turk Telekom Group's Strategic Approach to Superfast Broadband



**Q & A**

**Thank you...**