

Turkey Telecommunications Report Q1 2016

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Abstracts

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BMI View: Turkey's latest spectrum auction was held on August 26 2015. BMI has not made any revisions to its mobile forecasts in Q116. Strong growth of 3G gives BMI reason to believe that once launched 4G uptake will follow a similar pattern. The operators can launch commercial services from April 2016 and are expected to extend coverage to 90% of the population until 2021.

Each of the three mobile network operators gained 20MHz in the 800MHz band, and it unsurprisingly raised the most out of any bands available for auction, but all three operators had diverging strategies in terms of increasing their holdings. Turkcell spent less on the 800MHz band than on any of the other bands available, with the top price paid for 1800MHz. Historically Avea was the only operator with holdings in the band, where it offered GSM services, whereas Turkcell and Vodafone used 900MHz as they launched services earlier. Turkcell, by also being the sole bidder in the 2100MHz band and the main pursuer of 2600MHz, is looking to improve its ownership of high frequencies, so as to offer greater capacity being the market leader. Avea, having little spectrum in the 900MHz band, had an opposite strategy, and looked to increase its ownership in the lower bands, so as to improve its coverage. Vodafone focused mostly on 800MHz and 2600MHz, paying the top price for the former, as it looked to focus more on the best 4G frequencies available internationally and used by its other subsidiaries. Operators almost trebled their holdings after the auction, with Turkcell still the largest stakeholder, but with a more diversified portfolio allowing for new services to be launched in the market.

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