

Turkey Telecommunications Report Q3 2016

<https://marketpublishers.com/r/T9E370491B3EN.html>

Date: April 2016

Pages: 58

Price: US\$ 1,295.00 (Single User License)

ID: T9E370491B3EN

Abstracts

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BMI View: The Turkish telecoms market will be driven by advanced technologies, with the launch of LTE services in April 2016 accompanying the development of fibre networks. This will grow the demand for greater usage, enabling operators to monetise their investments, as well as proposing new types of offers, such as convergence, as the market continues its maturation. Nevertheless, we caution that the market may be reaching saturation and organic growth prospects in terms of new subscriber numbers are set to stagnate.

Key Data

The mobile market reached 73.16mn subscriptions in December 2015, as all three operators reported growth and a higher percentage of postpaid customers.

The demand for data and the growing share of contract users has driven ARPU, which has increased for all three players, reaching TRY25.1 for Turkcell, TRY25.8 for Vodafone, and TRY28.8 for Avea at end of Q4 2015.

DSL continues to be the dominant broadband technology, with 7mn subscriptions out of a total market of 10.8mn, but the development of VDSL and fibre means that 62% of users access speeds of between 10-30Mbps

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