

Turkey Telecommunications Report Q4 2016

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Abstracts

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BMI View: We retain our generally positive outlook for the Turkish mobile market in our latest Q4 2016 report update. We hold the opinion that the telecoms market will be driven by advanced technologies, with the launch of LTE services in April 2016 signalling a crucial turning point in the market dynamics, along with the development of fibre networks in the country. We believe that this will help boost 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 development. However, we caution that the market may be reaching saturation levels as organic growth prospects in terms of new subscriber numbers are set to stagnate over the course of our forecast period.

Key Data

The mobile market reached 73.16mn subscriptions in March 2016, as all three operators reported growth and a higher percentage of post-paid customers. The market lost only 7,000 subscribers in Q116, a negligible number.

The demand for data and the growing share of contract users has driven ARPU, which has increased for all three players, reaching TRY24.7 for Turkcell, TRY25.8 for Vodafone, and TRY24.0 for Avea at end of Q1 2016.

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