

Türkiye Elektronik Haberleşme Sektörü

Electronic Communications Sector in Turkey

Dr. Nur SAYGI
Bilgi Teknolojileri ve İletişim Kurumu
ICT Authority of Turkey
nsaygi@btk.gov.tr

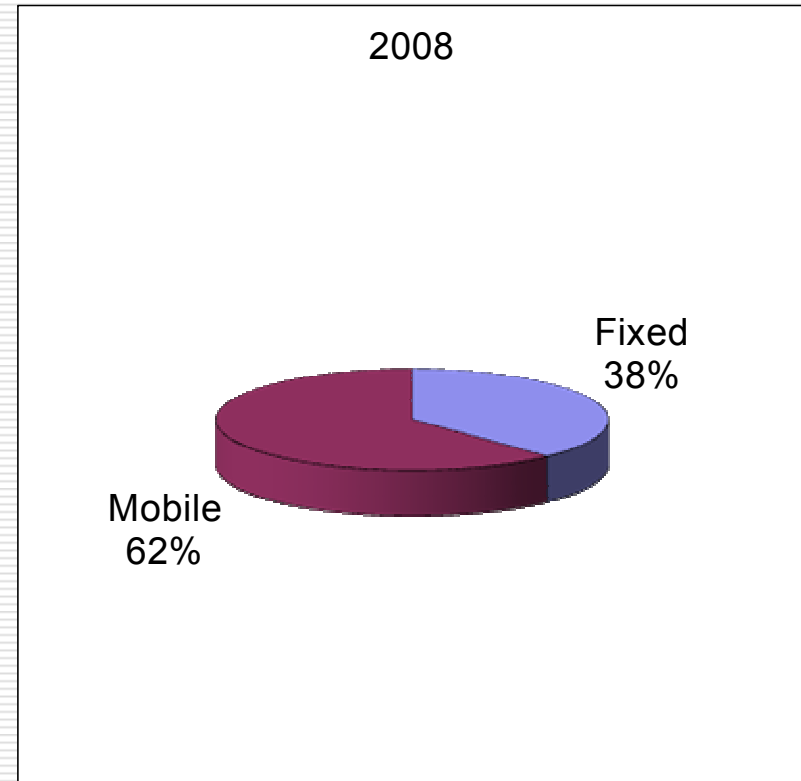
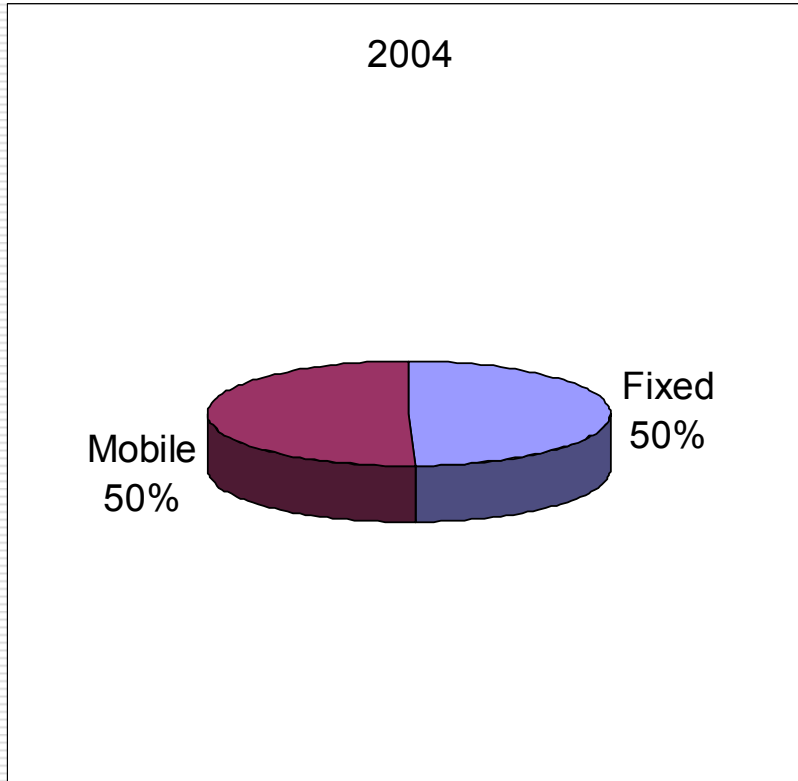
08.09.2009, İTÜ, İstanbul

Gündem / Agenda

- Market verileri
- Genişbant pazarı
- Rekabet seviyesi
- Altyapı
İşletmecileri
- Değerlendirme
- Market data
- Broadband market
- Competition level
- Infrastructure
operators
- Conclusion

Pazar Büyüklüğü : 20,4 Milyar TL

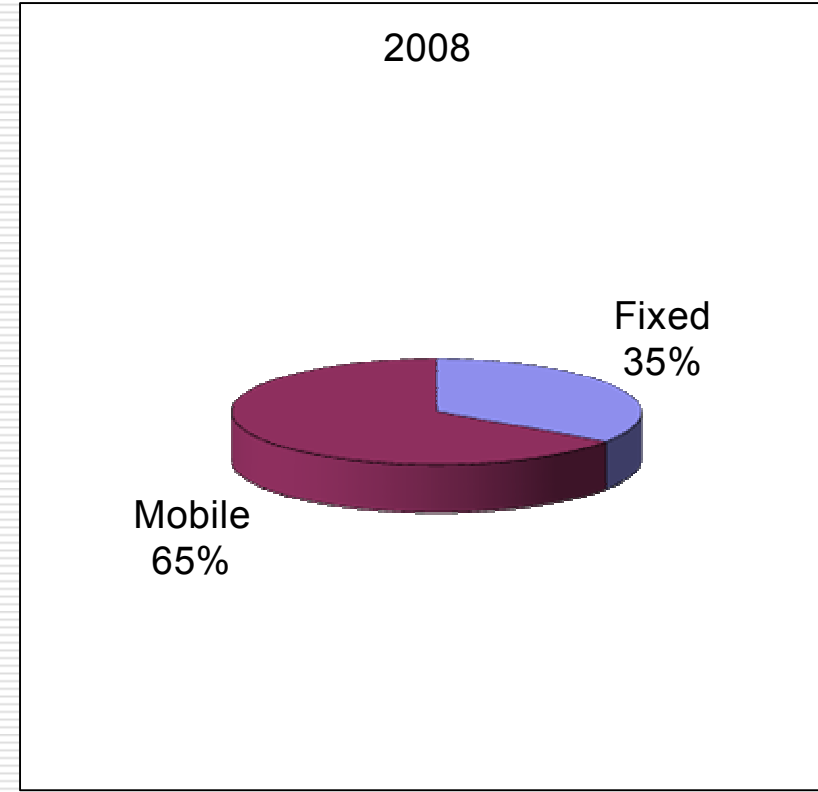
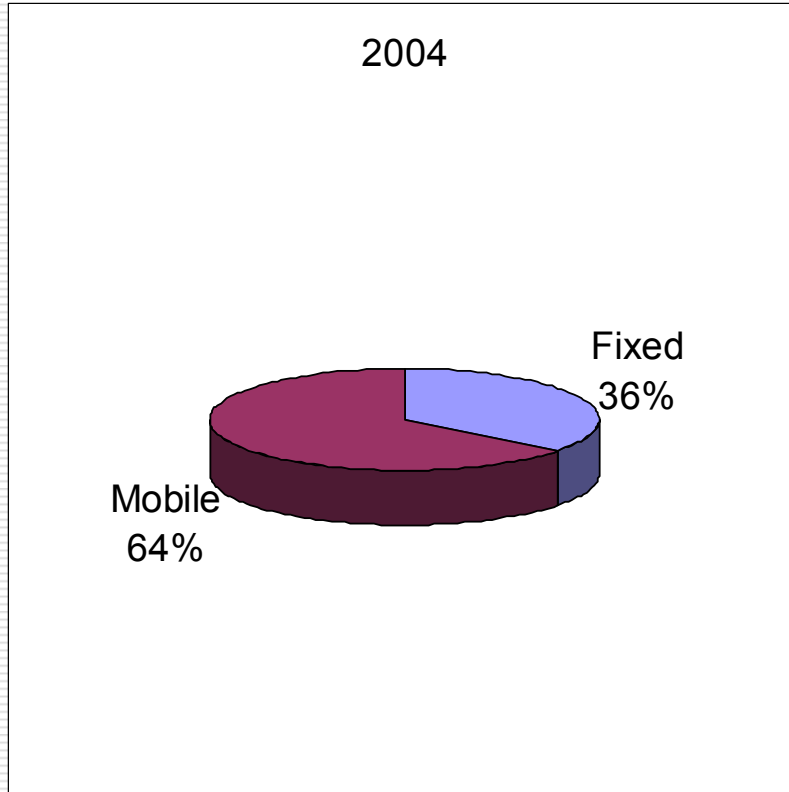
Market Size : 13,6 Billion \$ US



1 \$ = 1.5 TL, www.tcmb.gov.tr, 4.9.2009

Sektör yatırımları: 4,0 Milyar TL

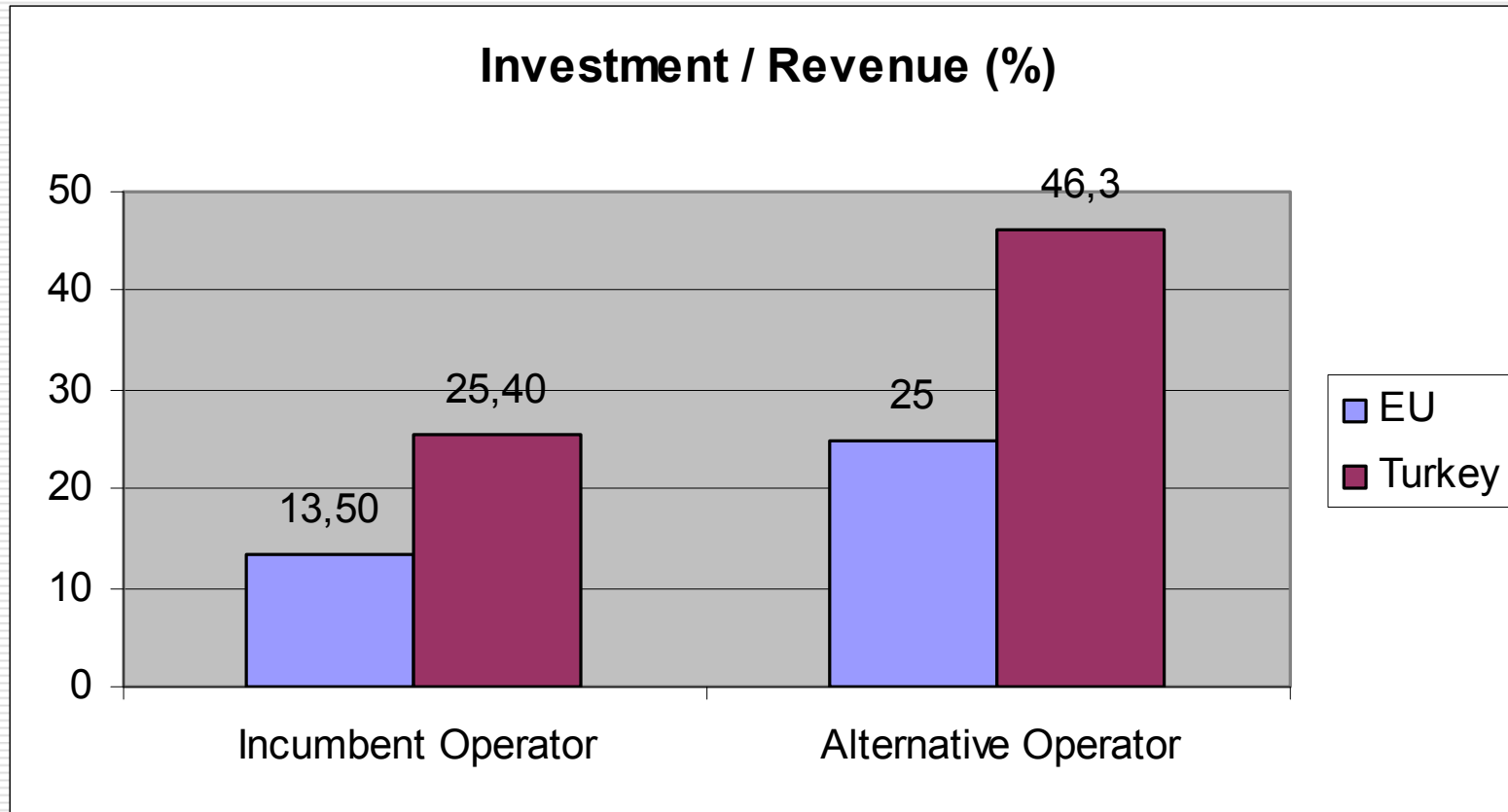
Sector investmet : 2,7 Billion \$ US



1 \$ = 1.5 TL, www.tcmb.gov.tr, 4.9.2009

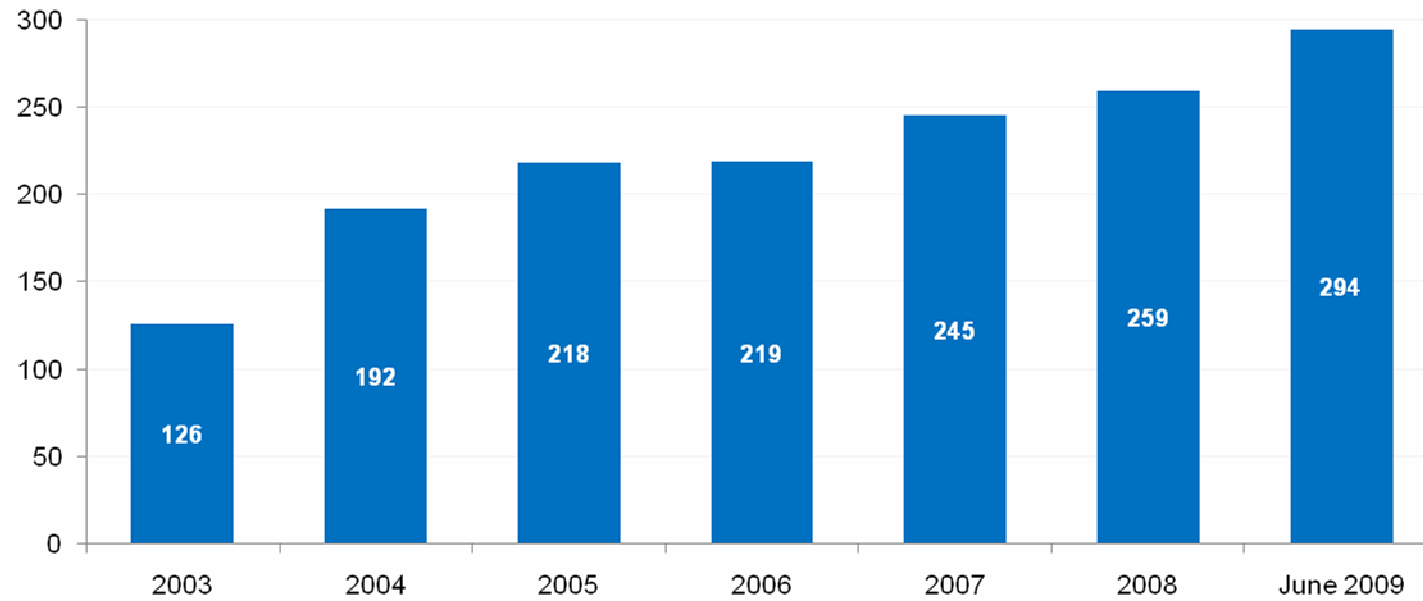
Yatırım / Gelir Oranı

Investment / Revenue ratio



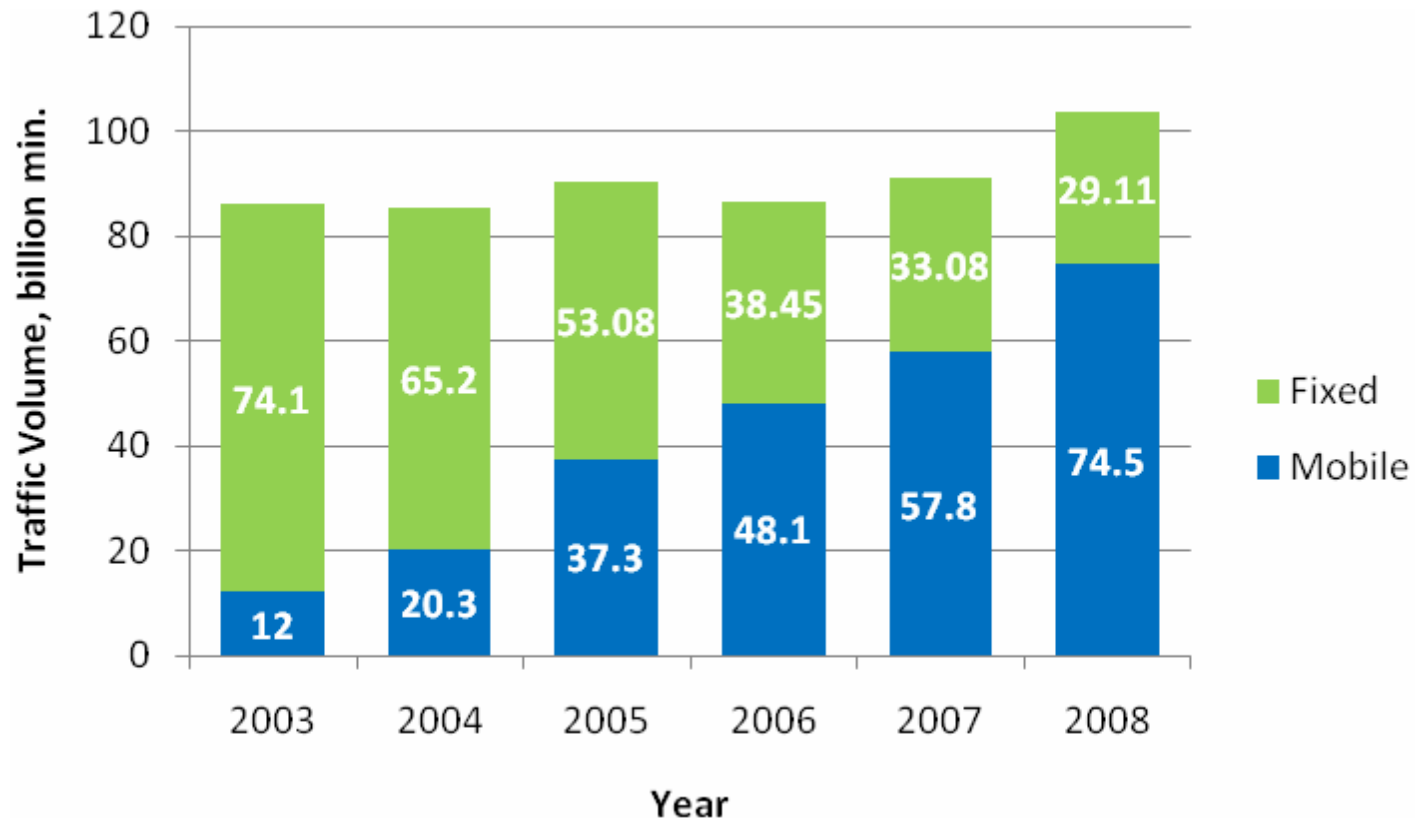
Yetkilendirme Sayısı

Number of Authorization



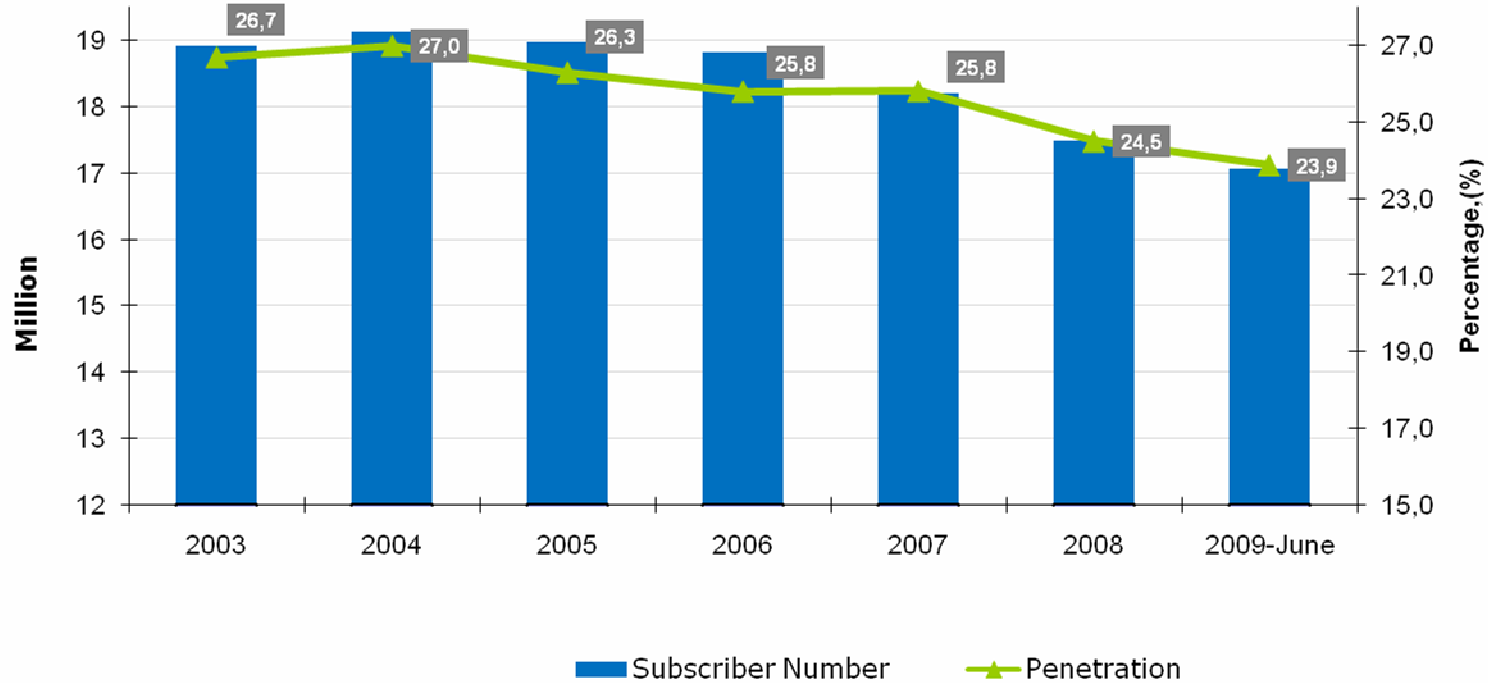
Toplam Arama Trafiği (Milyar Dakika)

Total Call Volume (Billion Minutes)



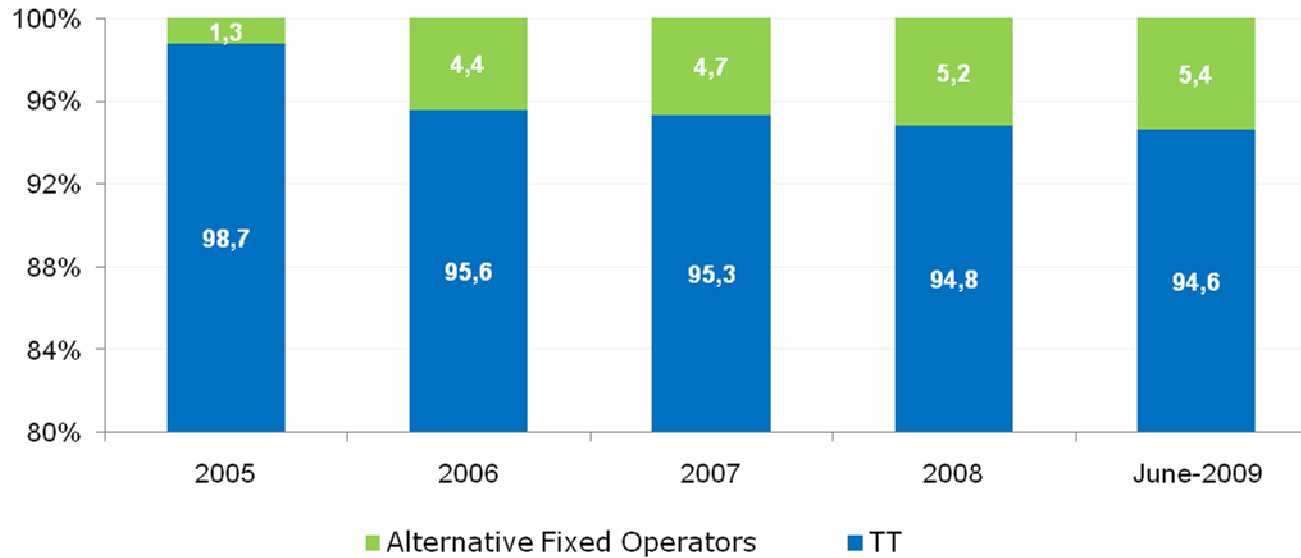
Sabit Telefon Aboneliği

Fixed Telephone Subscribers



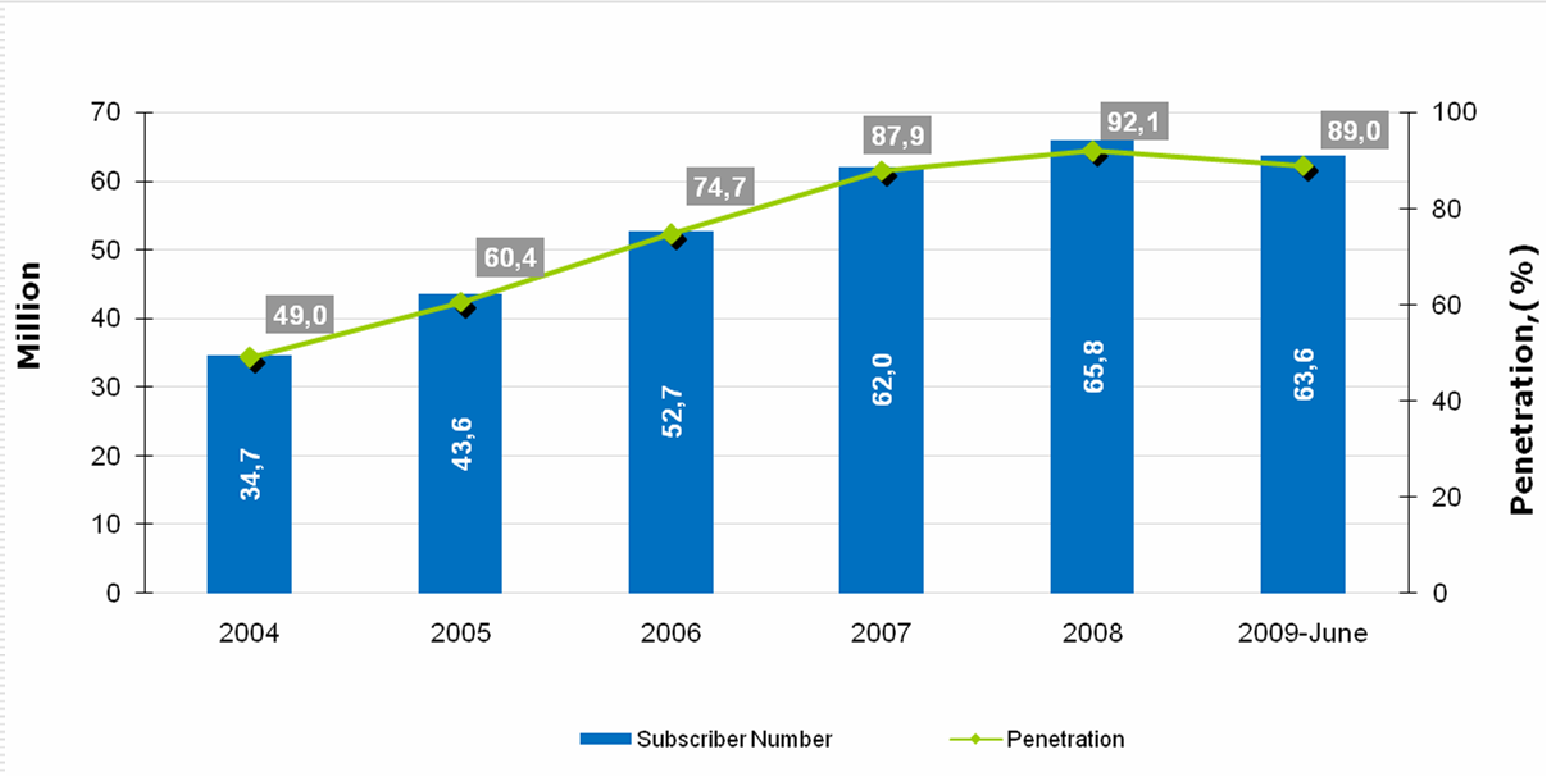
Sabit İşletmecilerin Gelir Dağılımı

Revenue Share of Fixed Operators



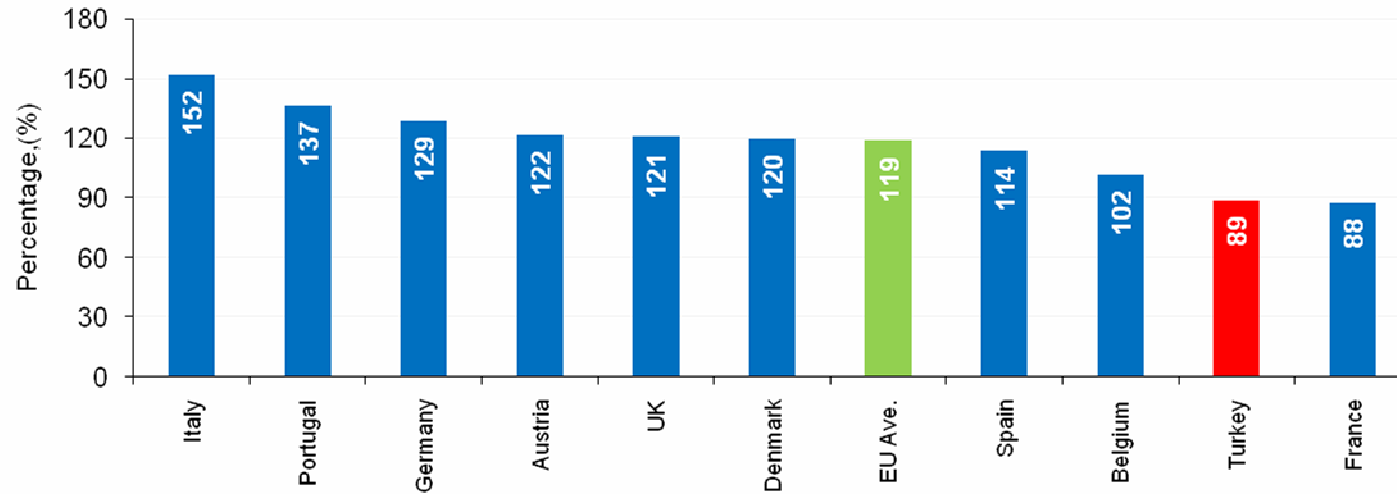
Mobil Telefon Aboneliği

Mobile Subscribers



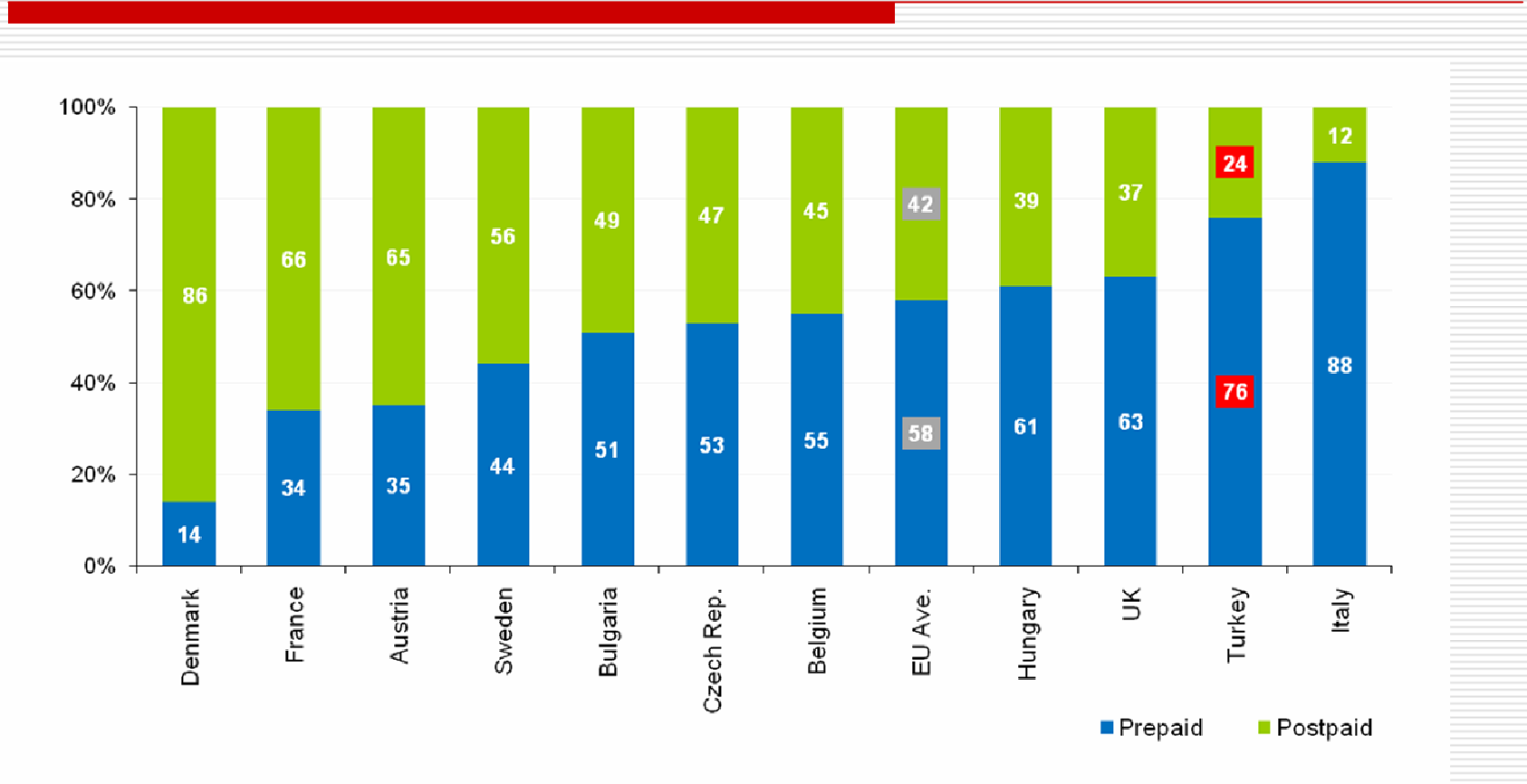
Avrupa'da Mobil Yaygınlık

Mobile Penetrations in EU



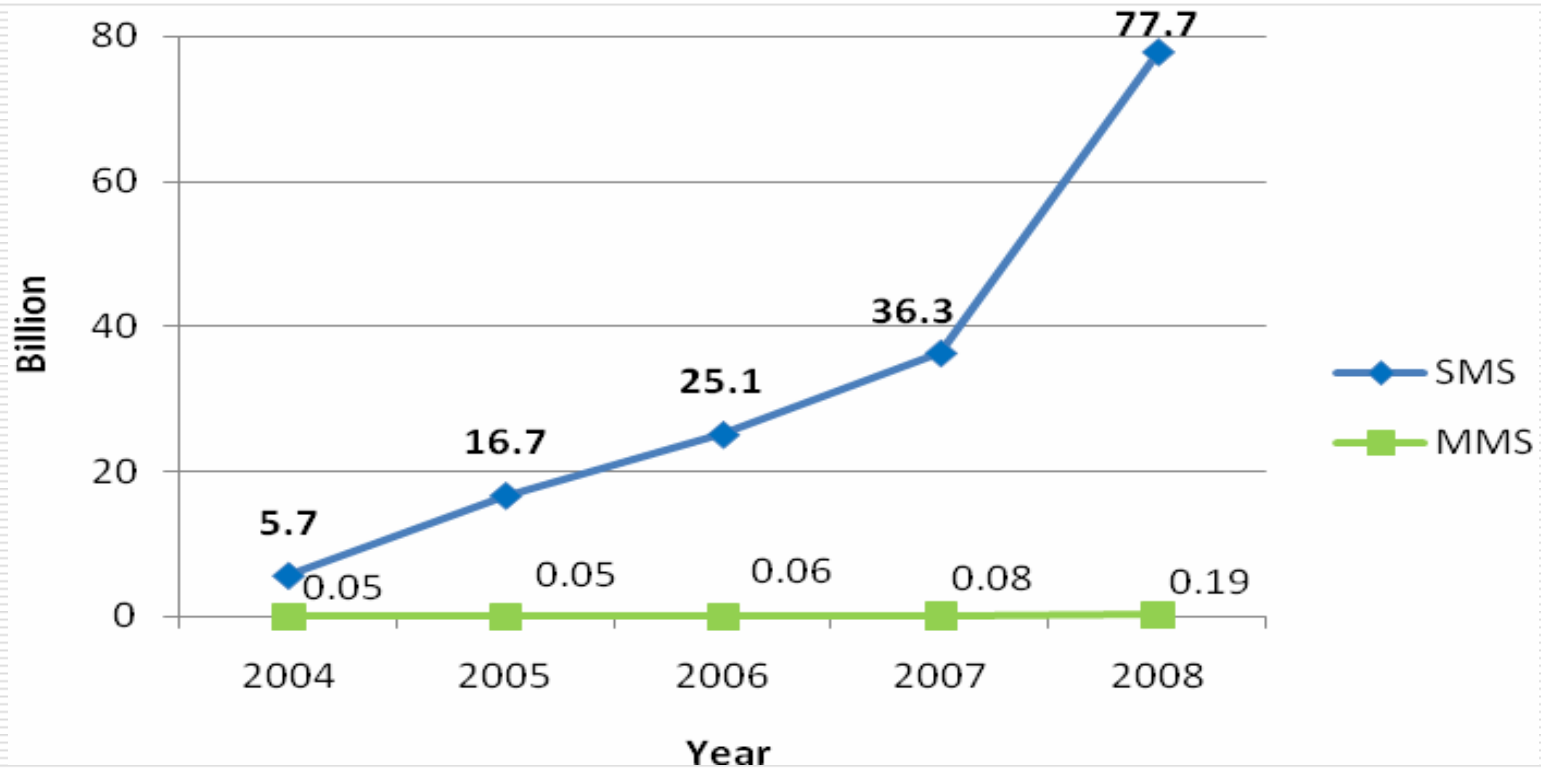
Önödemeli ve Faturalı Abonelikler

Prepaid and Postpaid Subscribers



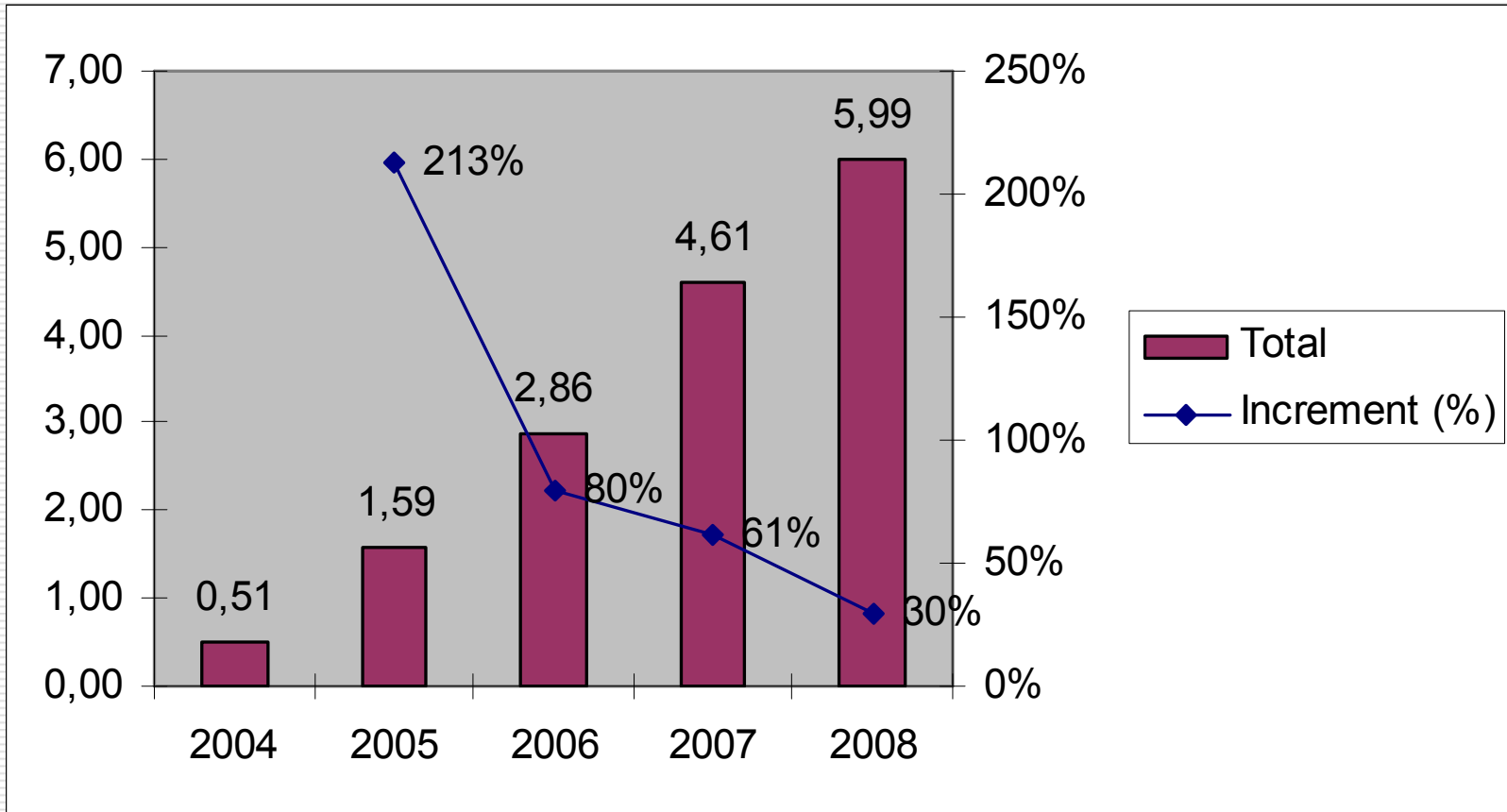
Mobile Mesaj Hizmetleri

Mobile Message Services



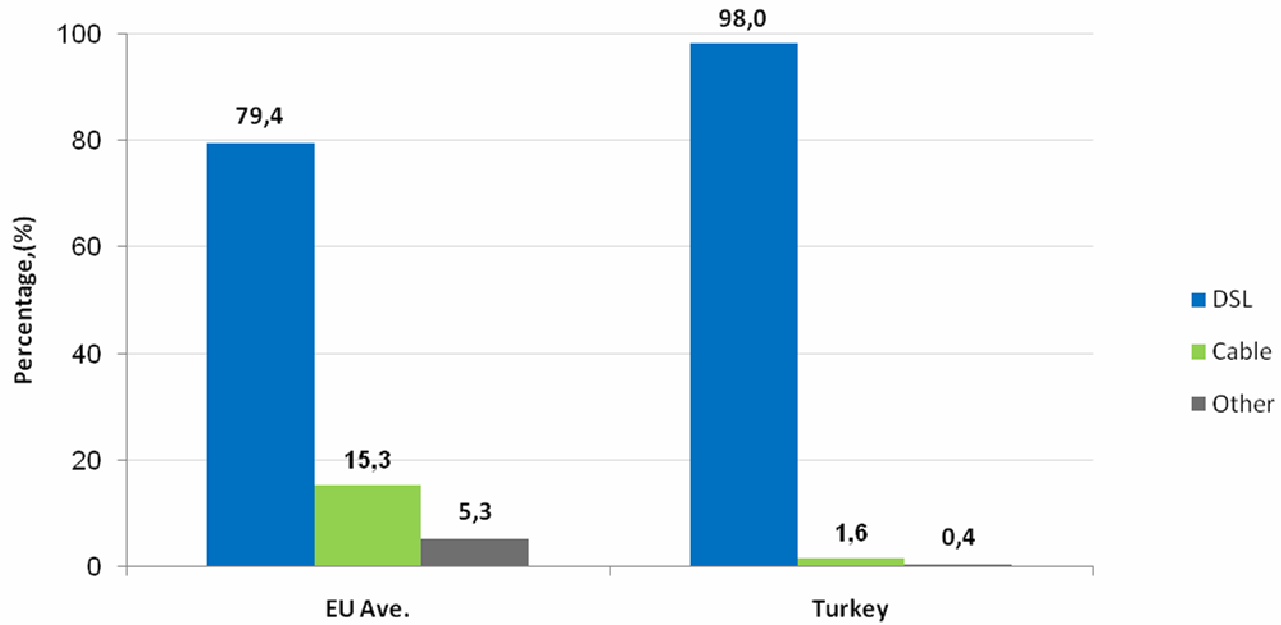
Geniřbant Aboneliđi

Broadband Subscribers



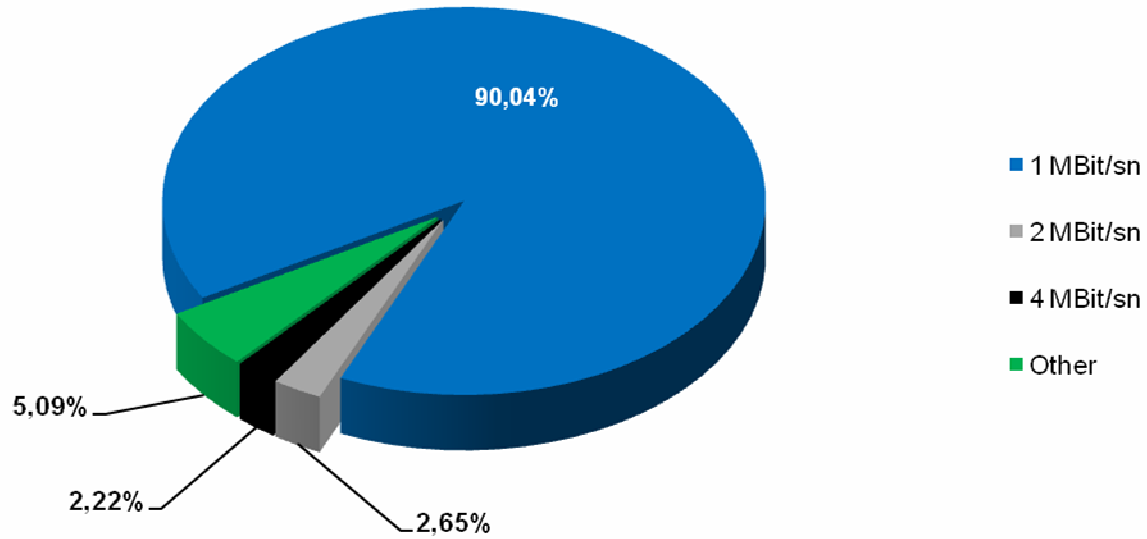
Geniřbant Baęlantı Tipleri

Broadband Connection Types



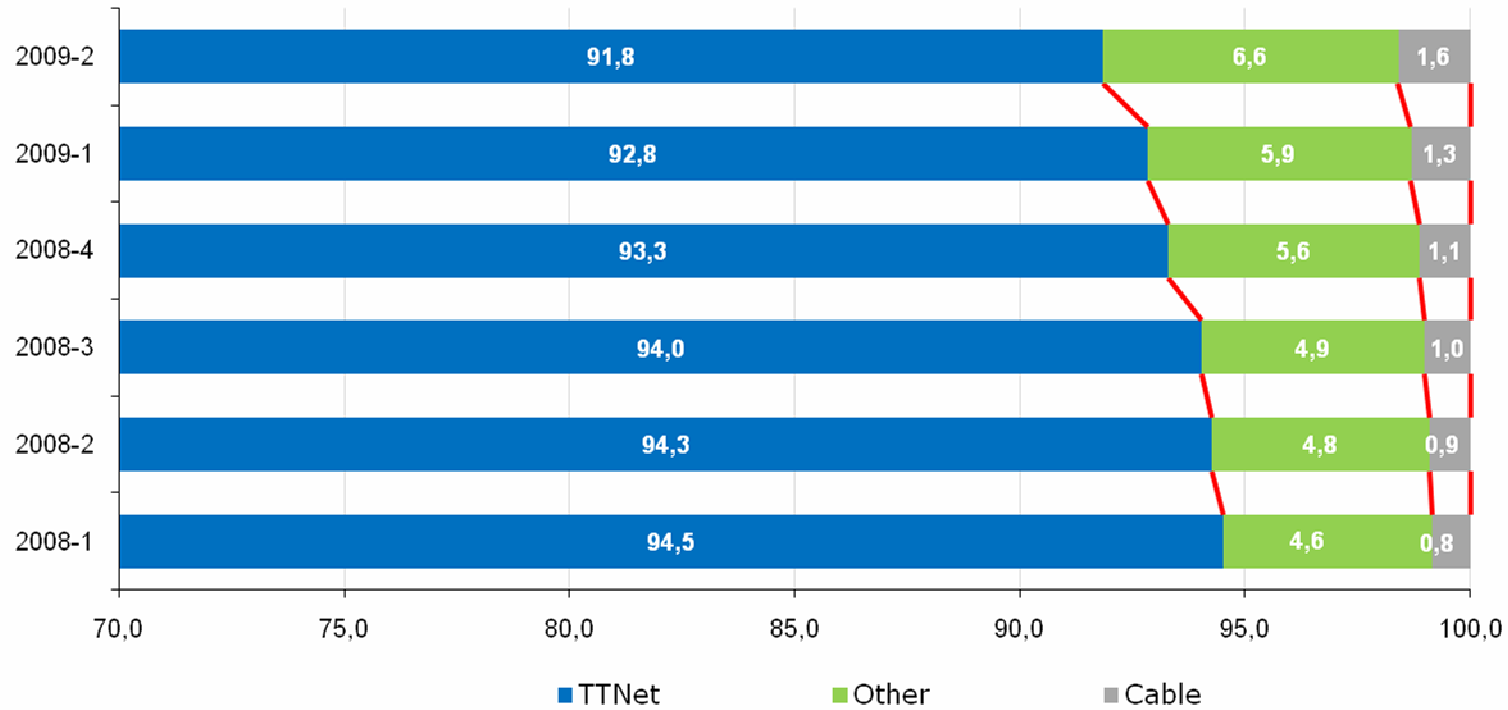
DSL Bağlantı Hızı

DSL Connection Rate



Geniřbant Pazar Payları

Broadband Market Shares



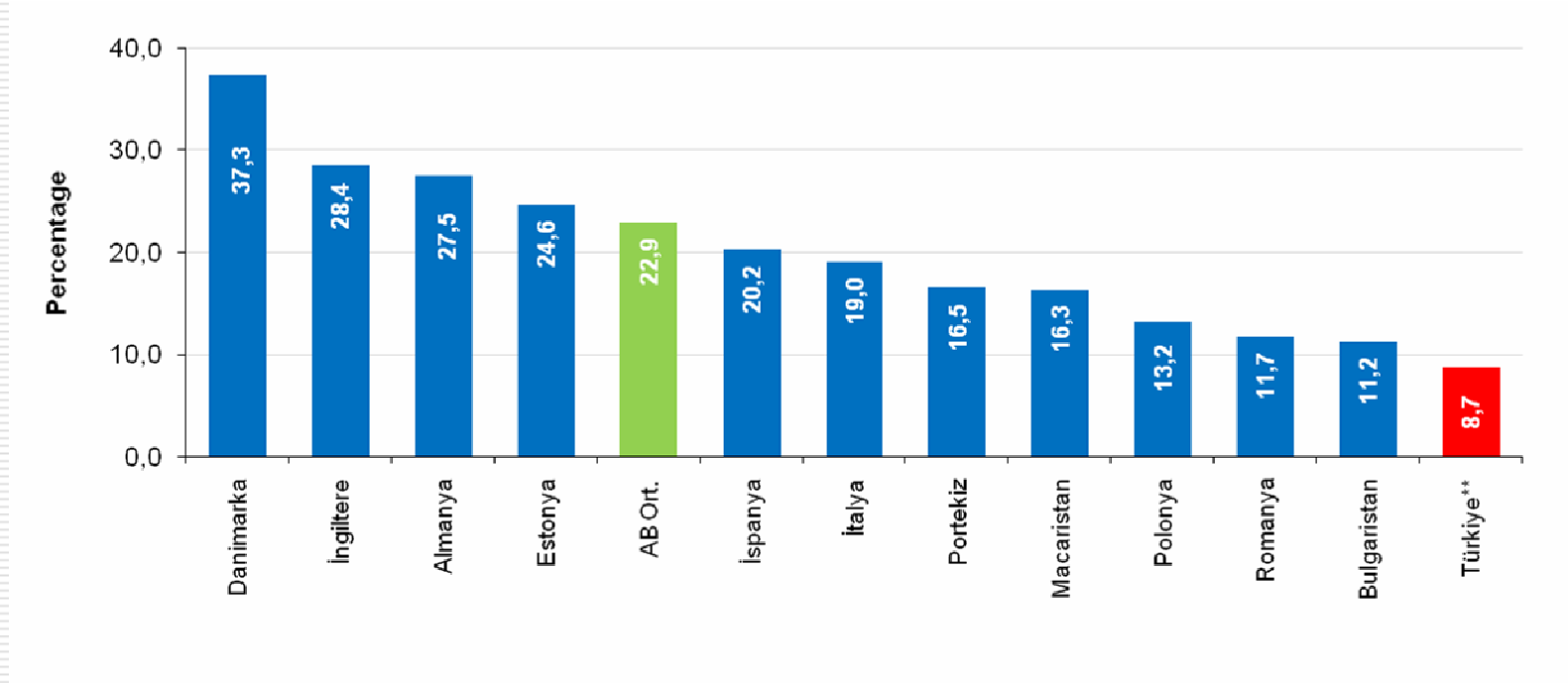
Kablo TV Şebekesi

Cable TV Network

Cable TV Capacity	Cable TV Subscribers	Cable Broadband
2.760.000	1.150.000	99.000

Aboneliğe Göre Genişbant Yaygınlık

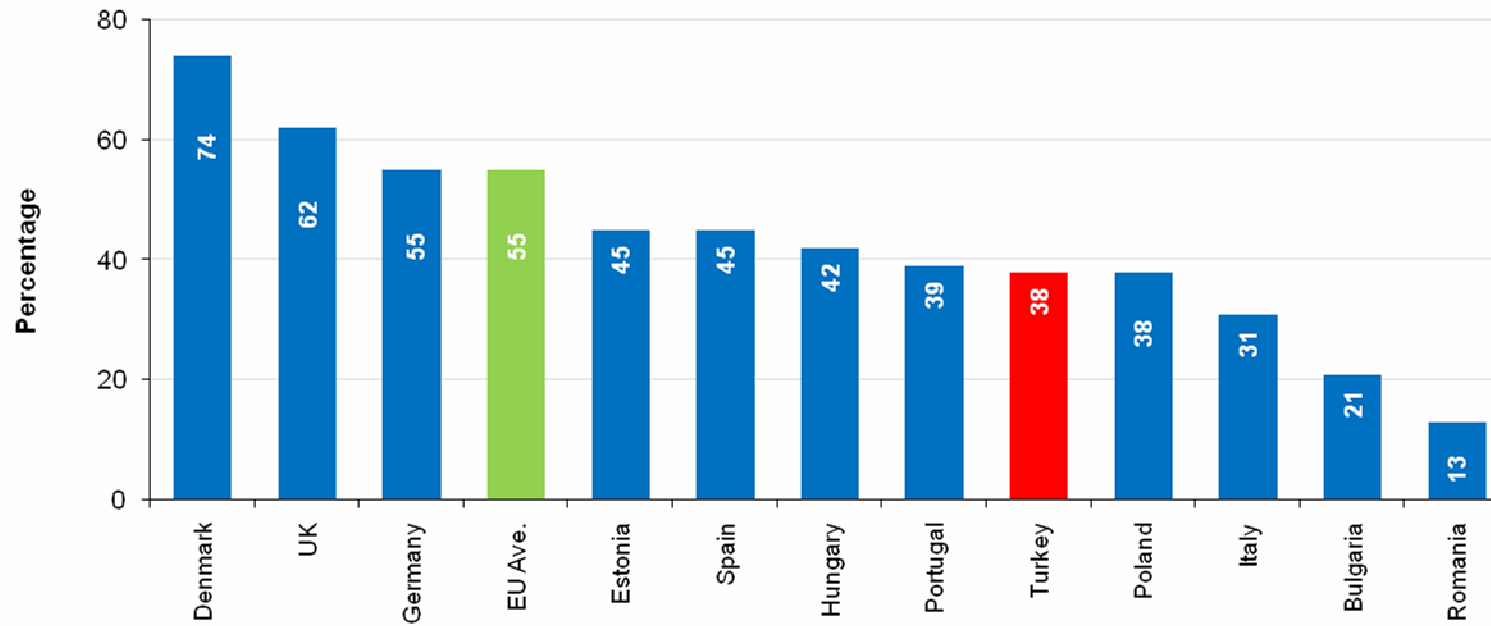
Subscriber Broadband Penetration



** July 2008 data for EU, June 2009 data for Turkey

Konut Sayısına Göre Genişbant Yaygınlık

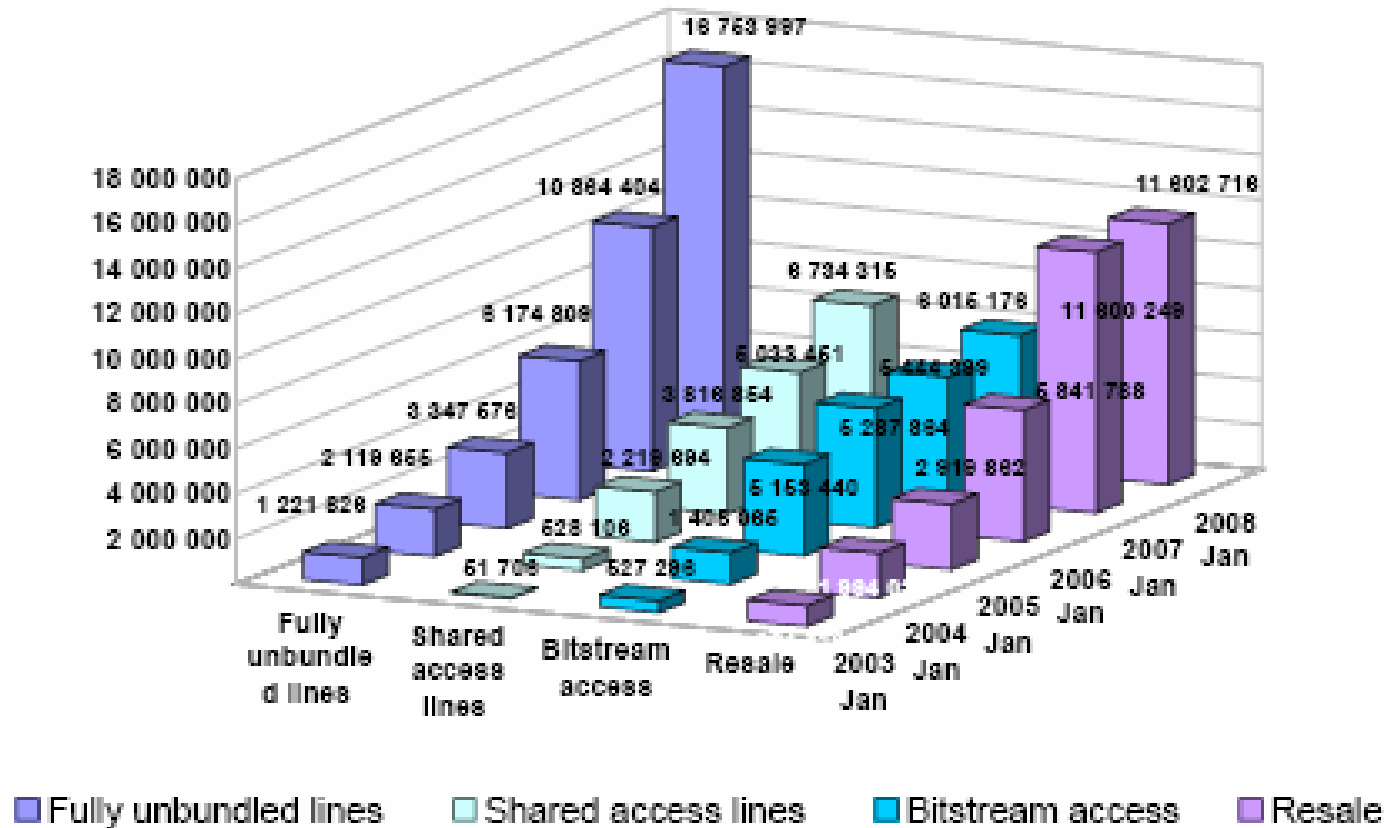
Household Broadband Penetration



** July 2008 data for EU, June 2009 data for Turkey

ADSL Toptan Erişim Türleri- AB

ADSL Wholesale Access Types - EU



ADSL Toptan Erişim - Türkiye

ADSL Wholesale Access - Turkey

LLU	IP Bitstream	Resale	Total
12.782	6.037.572	6.165	6.056.519

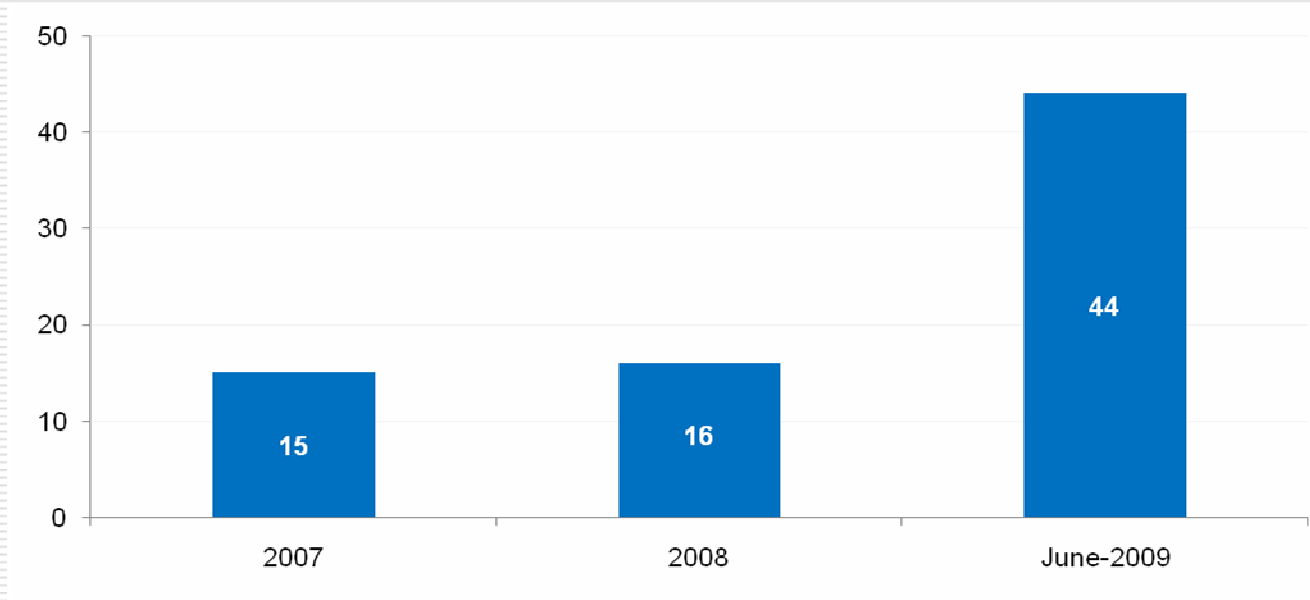
Fiber altyapıya sahip işletmecileri

Operators having fiber networks

- Türk Telekom
- Tellcom
- MTCR
- Vodafone
- eso-es.net
- Global
- Grid
- Borusan
- Turk.net

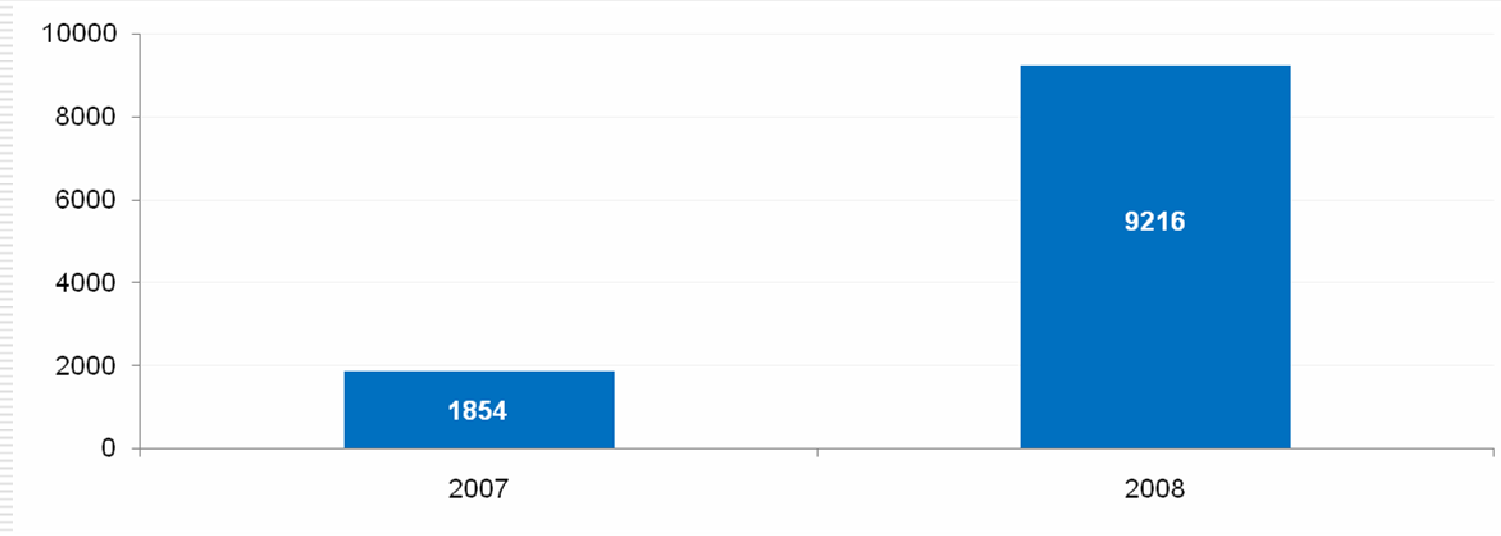
Alternatif Altyapı İşletmecileri

Alternative Infrastructure Operators



Alternatif Fiber Şebeke (km)

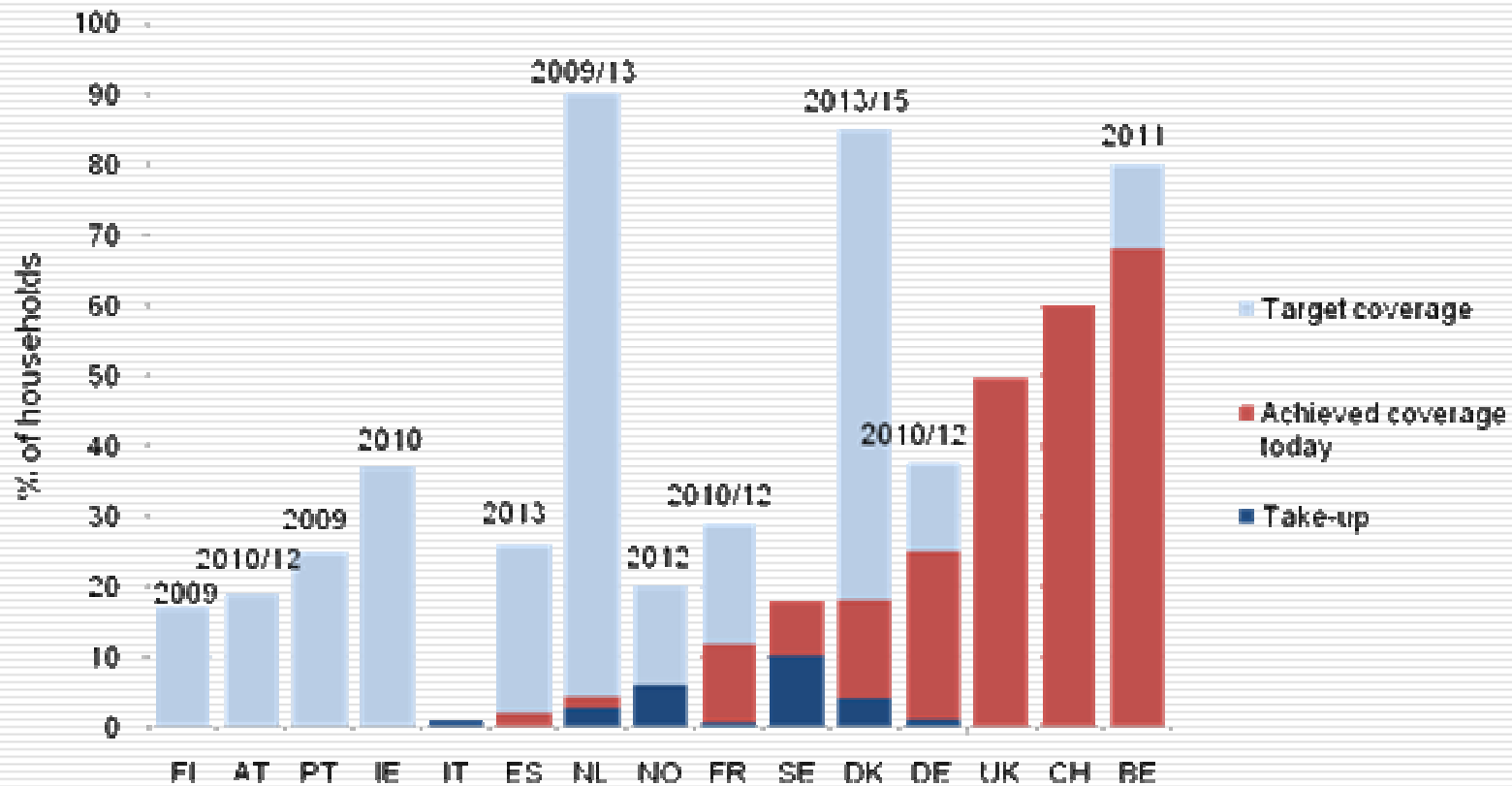
Alternative Fiber Network (km)



AB Yeni Nesil Erişim Planı

Next Generation Access Plan in EU

NGA benchmark (including FTTH/FTTC/HFC cable)



Source: www.cullen-international.com

Son Gelişmeler /

Recent developments

- Elektronik Haberleşme Kanunu
- Yeni yetkilendirme rejimi
- Geçiş hakkı yönetmeliği
- Tesis paylaşımı düzenlemeleri
- 3G yetkilendirmesi
 - Ar-Ge merkezi şartı
- www.btk.gov.tr

- Electronic Communications Law
- New authorization regime
- Rights of way regulation
- Facility sharing regulation
- 3G authorization
 - R&D center obligation
- <http://www.btk.gov.tr/eng/english.htm>

Değerlendirme / Conclusion

- Hizmete dayalı rekabet ağırlıkta
- Alternatif altyapı ihtiyacı
- Artan altyapı işletmeci sayısı
- Yeni nesil şebekelere geçiş
- Daha yüksek veri trafiği ve daha yüksek kapasite ihtiyacı
- Dominant service based competition
- Need for alternative infrastructure
- Increasing number of infrastructure operator
- Migration to new generation networks
- More data traffic and need for more capacity

Türkiye Elektronik Haberleşme Sektörü

Electronic Communications Sector in Turkey

Dr. Nur SAYGI
Bilgi Teknolojileri ve İletişim Kurumu
ICT Authority of Turkey
nsaygi@btk.gov.tr

08.09.2009, İTÜ, İstanbul