

***Roaming Market  
Dynamics:  
Turkish Market Experience***

***Dr. Tayfun Çataltepe  
TURKCELL  
Chief Regulation Strategies  
and Wholesale Business  
Officer***

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# Roaming Market : Business Scope

- Country Based Market Structure (wholesale & retail)
  - Competitive Markets
  - Non-competitive Markets (monopoly / oligopoly)
- Pricing logic:
  - Standard pricing per service (MOC, MTC, SMS, GPRS, MTR, taxing, etc.)
  - Discounted pricing – achieved through agreements with roaming partners
- Competition Outcome
  - Provide better Roaming Retail offers
  - Churn/Acquisition balance
  - Optimization of cost basis



# Roaming Market : Operator Positions

- Operator roaming in/out volume net position
  - Balanced Traffic Levels
  - Net Receiver Position
  - Net Sender Position
- De Facto Market Position
  - Geographic / Population Coverage
  - Spectrum Compatibility



# ***Turkish Roaming Market : Turkcell Case***

- Competitive Market Leads To:
  - Decreasing retail prices
  - Advantageous retail packages (Voice & SMS & Data)
  - User protective tools (SMS information; data speed control and so forth)
- Result:
  - Decreased customer roaming complaints (7%→3%)
  - Transparency



# ***Turkish Roaming Market : Turkcell Case –Major Effects of Roaming Tariffs and Packages in 2011***

- 25% voice tariff reduction in Europe, N.America and Russia (75% of roaming traffic)
- 40% reduction in data tariff
- Discounts up to 86% in customer invoices
- More than 30% of customers starting to use packages with discounted prices

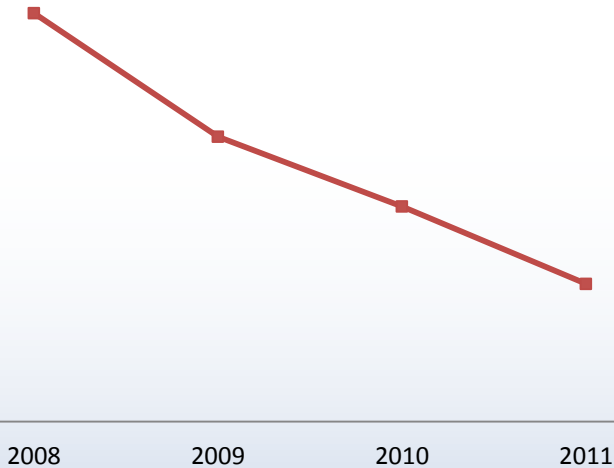


# Turkish Roaming Market : Turkcell Case - Wholesale

## Cost Trend per service

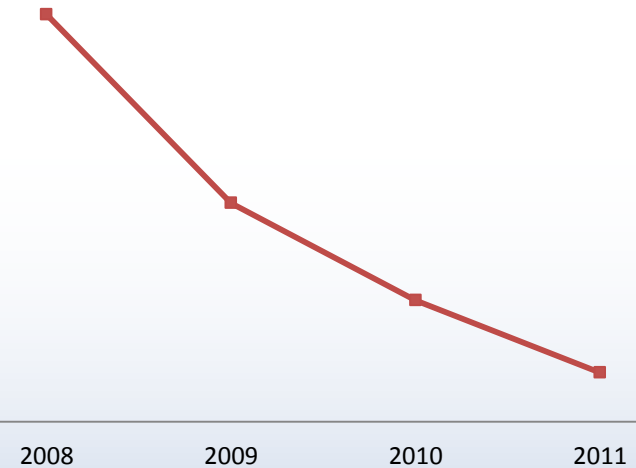
MOC IOT Trend

Outbound



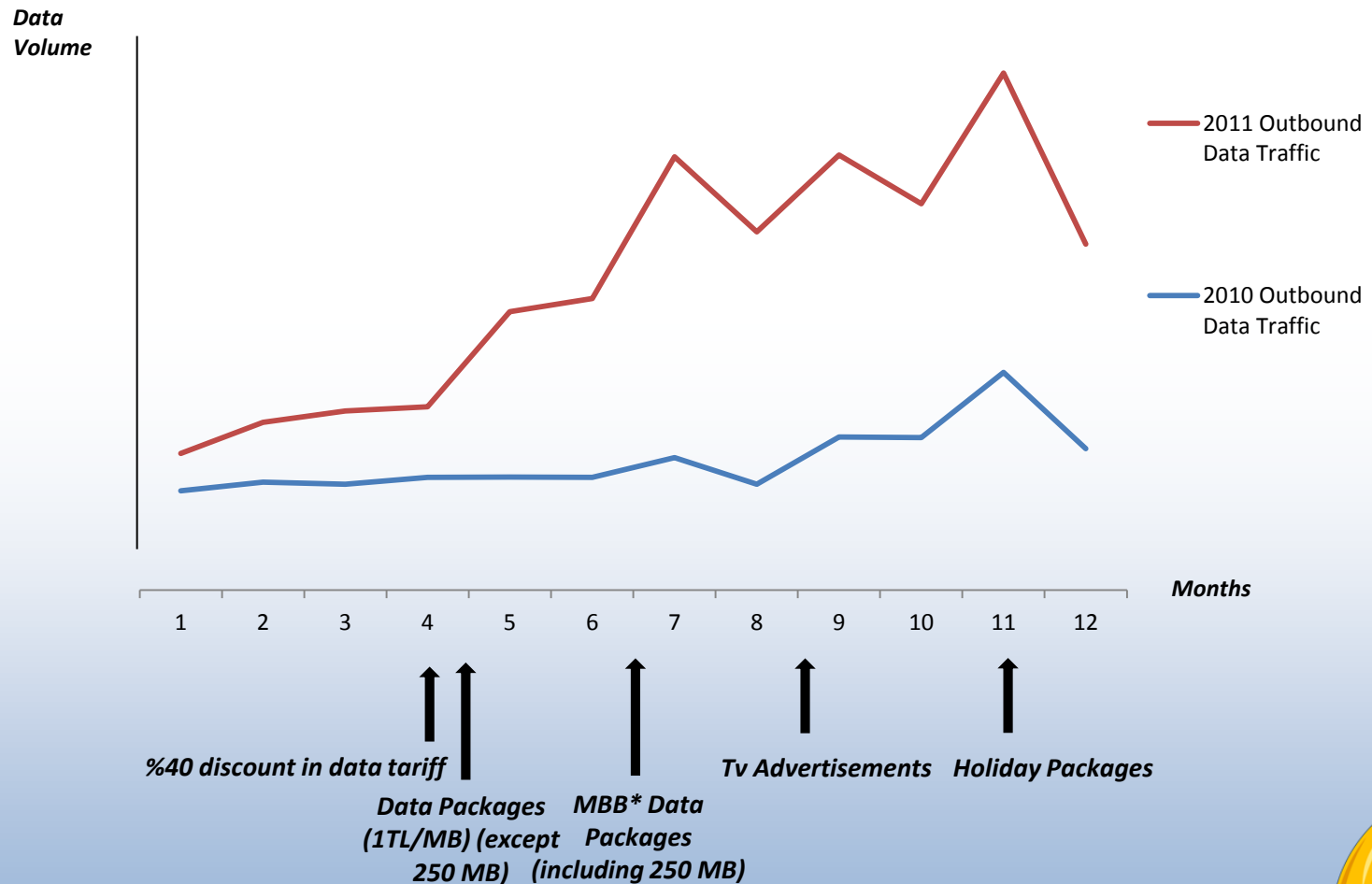
DATA IOT Trend

Outbound



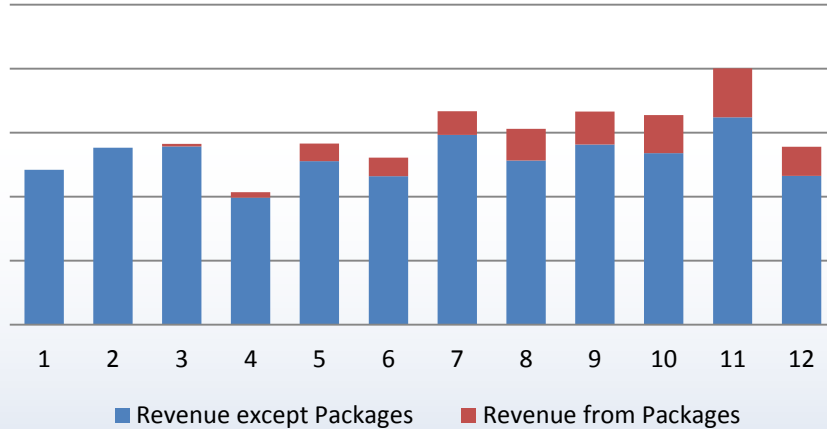
# Turkish Roaming Market : Turkcell Case – Data Traffic Trend

## Outbound Data Traffic

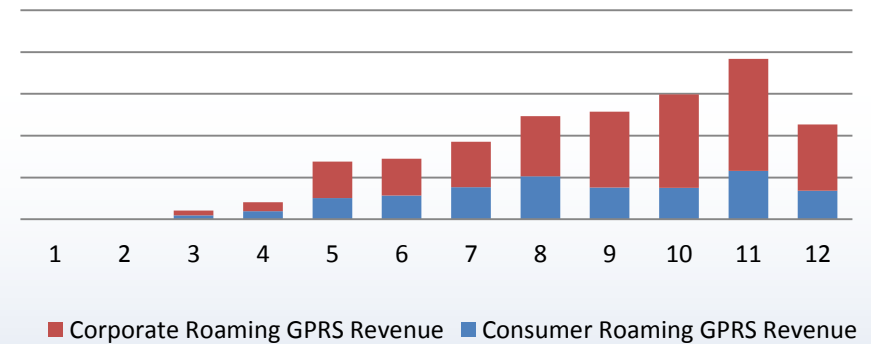


# Turkish Roaming Market : Turkcell Case – Effects of Packages on Growing Data Traffic

## Total Roaming GPRS Revenues



## Roaming GPRS Revenue from Packages





# ***How Market Dynamics affect Turkcell Roaming Propositions***

- Roaming market dynamics:
  - Consumers' increasing need to use roaming services when abroad
  - Competition

lead to 2 major outcomes:

A) Enhanced customer experience:

- I. Lower prices
- II. Transparency

B) Increased usage



# Thank You

***Dr. Tayfun Çataltepe***

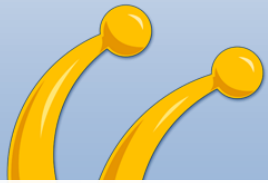
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[www.turkcell.com.tr](http://www.turkcell.com.tr)

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***BACK - UP***



# Innovative Roaming Propositions in Turkcell

VOICE*	
BASE TARIFFS (post, pre)	Europe & USA & Canada: 3,9 TL/min
	Russia & Ukraine: 3,9 TL/min
	Others: 7,8 – 6,3 TL/min
PACKAGES (post)	15TL 30 min (daily)
	49TL 90 min (monthly)
	19 TL 30 min (monthly)
	79TL 180 min (monthly)
PACKAGES (pre)	9 TL 30 min (daily)
	49 TL 120 min ( monthly)
excess usage for all: 0,99TL/min	

DATA*	
BASE TARIFF (post)	per invoice period
	0-10 MB: 10TL/MB
	10-20 MB: 4TL/MB
	20+ MB: 2TL/MB
BASE TARIFF (pre)	50 KB 0,50TL
DAILY PACKAGE (post)	19 TL 20 MB
	59 TL 100 MB
MONTHLY PACKAGES (post)	39 TL 30 MB
	79 TL 60 MB
	99 TL 100 MB
	199 TL 250 MB

