



KAAN TERZIOĞLU

Turkcell CEO

TURKCELL

The Digital Operator



From the By-stander in the
Bus Stop to Jet Pilot



From the By-stander in the
Bus Stop to Jet Pilot

DELIVERING VALUE THROUGH DIGITIZATION



52%

Bi-annual growth in
Group revenues



107%

Bi-annual growth in
EBITDA



42.1%

EBITTA
Margin



7 GB

Average data use of
4.5G customers in Jun'18



120M

Core digital services
downloaded

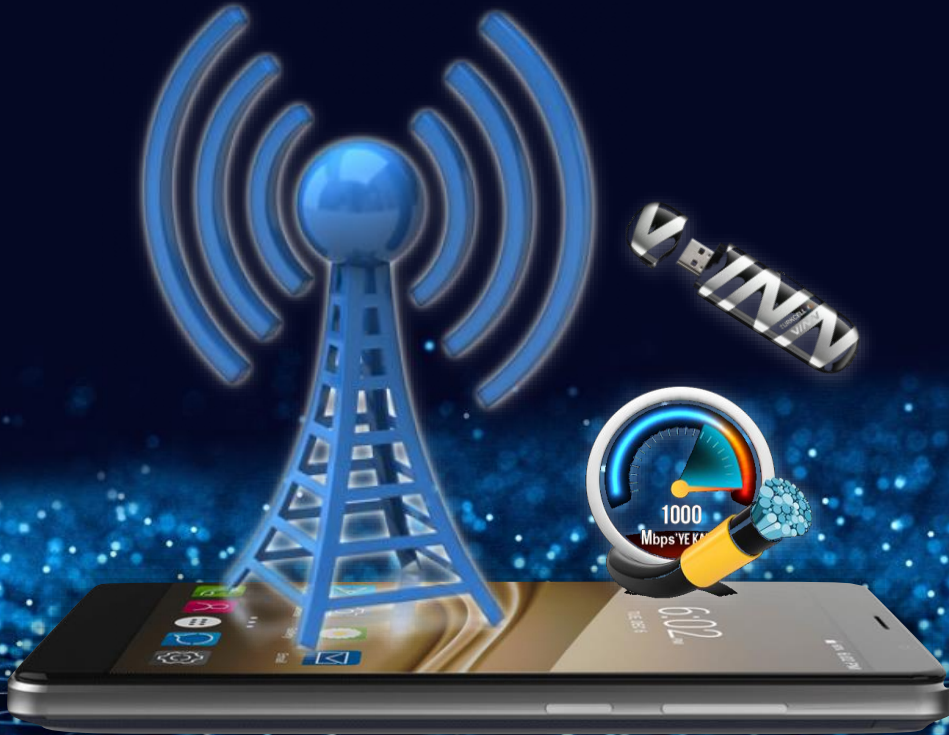


950k

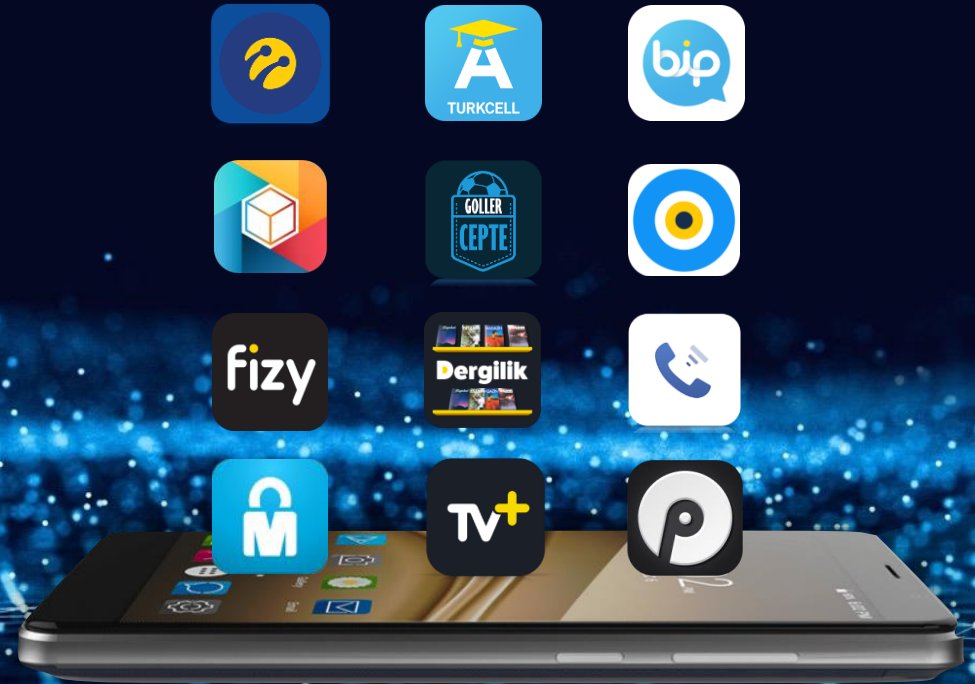
Net ad YoY Q2 2018
Turkcell Turkey



TRANSFORMING INTO THE DIGITAL OPERATOR



Network Operator



Experience Provider



3 DIMENSIONS OF DIGITAL TRANSFORMATION

A blue circular graphic containing four logos: Dergilik (top right), fizy (middle left), TV+ (middle right), and bip (bottom center).

Digital **Services**

A blue circular graphic containing five icons: a padlock (top left), a target (top right), a car with Wi-Fi (middle left), a microscope (bottom center), and a person icon (middle right).

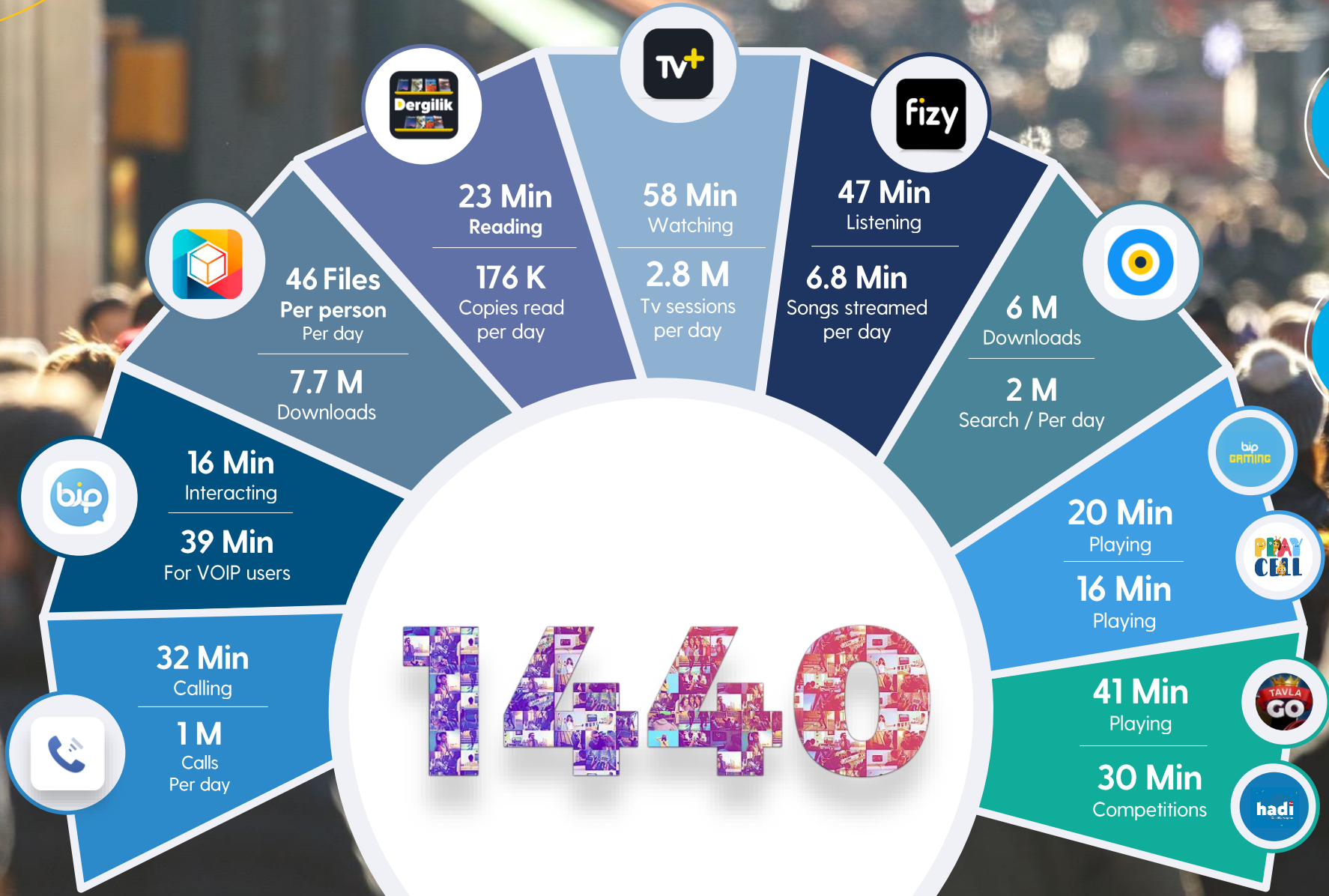
Digital **Ecosystem**

A blue circular graphic containing three logos: RTM (top left), TURKCELL MAYA (top right), and a stylized person icon (bottom center).

Digital **Company**



REDEFINING DIGITAL SERVICES



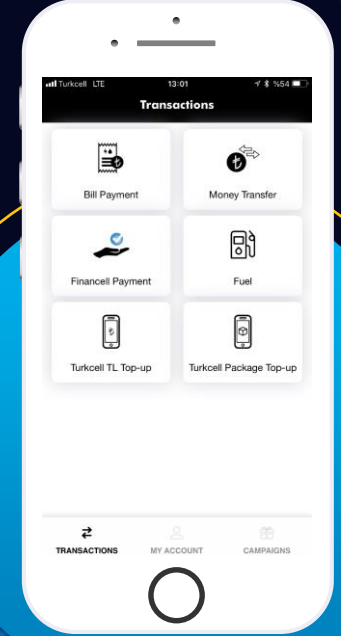
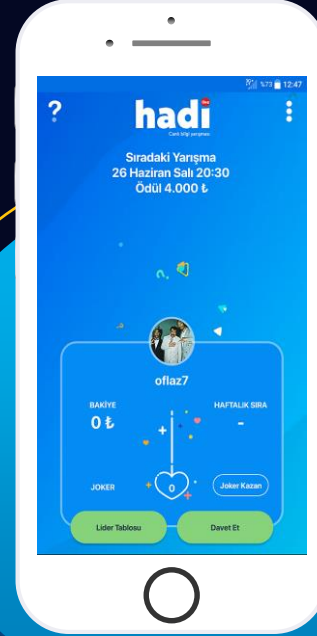
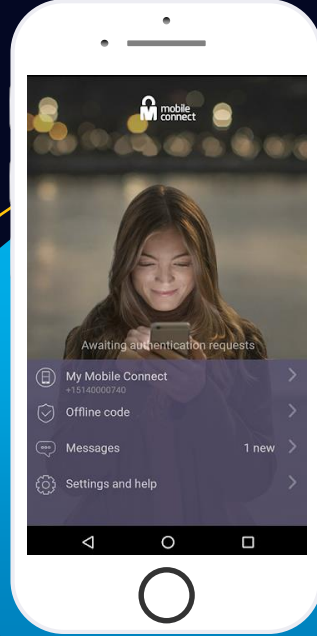
120 million core app downloads
• 2nd player in App markets



60.5% triple-play customers
• Revenue share: 77%
• Lower Churn



DIGITIZING THE BROADER ECONOMY



Traffic **Management**



Secure **Login**



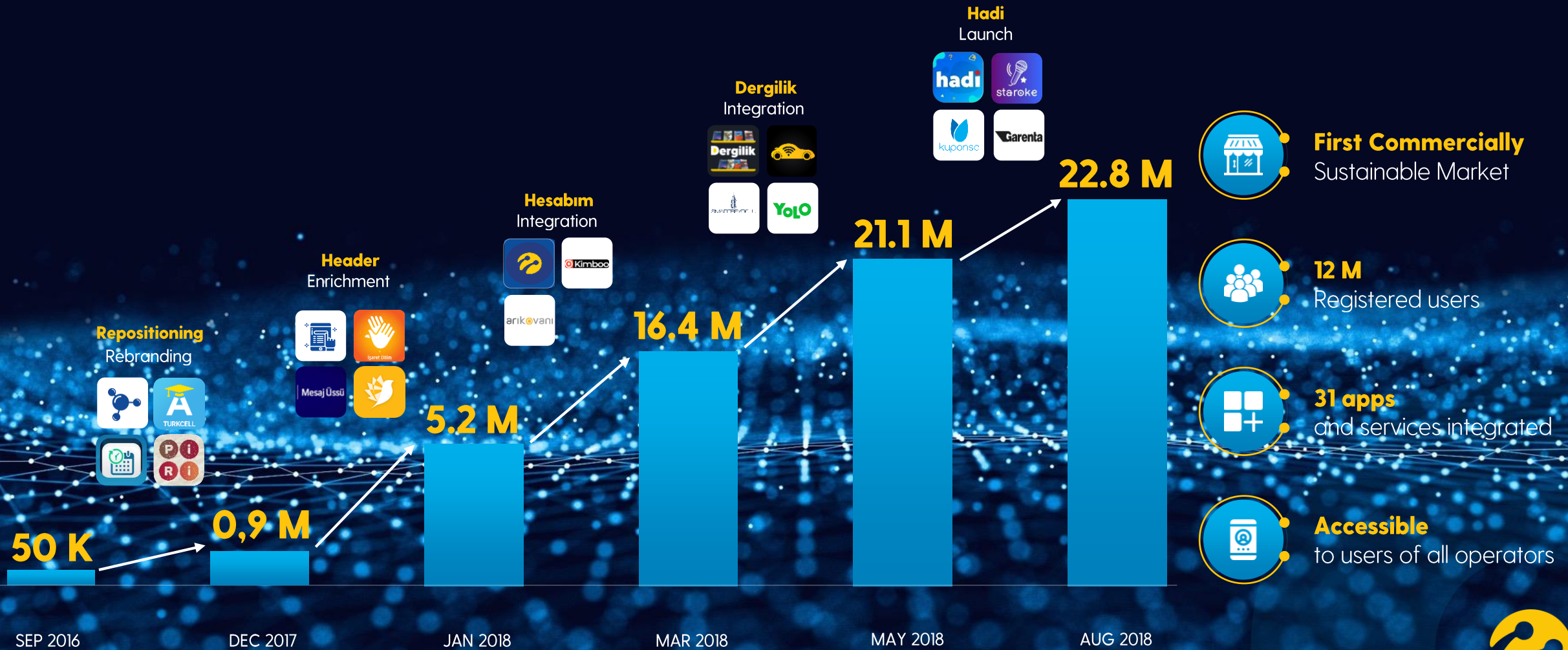
Digital **Context**



Seamless **Payment**



IMPACT OF DIGITAL SERVICES ON MOBILE CONNECT USE



MOBILE CONNECT VALUE PROPOSITION



CUSTOMERS

Ease-of-use and
Accountability



MERCHANTS

Technology, Trust
and Efficiency



GOVERNMENTS

Economic Growth
and Cybersecurity



TELECOM OPERATORS

New Revenue
Streams



DIGITIZING THE BROADER ECONOMY



KOPILOT



SMART AGRICULTURE



CONSUMER TRUST IN DIGITAL SERVICES

56%



See their MNO as more than an OTT provider

53%



Of consumers are less likely to share personal data with OTT providers

54%



Would prefer to deal with their MNOs for services like music and video streaming

68%



Are calling for greater regulation of OTTs

62%



Trust mobile operators more as they protect consumers' data

87%



Don't think selling data to third parties is acceptable



DIGITAL ECONOMY

DATA
SOVEREIGNTY



CREDENTIALS
MANAGEMENT



DIGITIZING
INDUSTRIES



DIGITAL
GOVERNMENT



DIGITAL
PAYMENTS



CYBER
SECURITY



HUMAN IN THE
DIGITAL AGE





THANK YOU



TURKCELL
The Digital Operator

CREATING THE DIGITAL COMPANY

DATA-DRIVEN, REAL-TIME AND TRANSPARENT



LIFECELL VENTURES

