



2026 Q1 Investor Presentation



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Note: EBITDA is a non-GAAP financial measure. The EBITDA definition used in this investor presentation includes revenues, cost of sales, marketing, sales and distribution expenses, general administrative expenses, research and development expenses and other operating income/(expense), and income/(expense) from investing activities, but excludes depreciation, amortisation and impairment expenses, financial income/(expenses) presented in other operating income/(expenses) (i.e. FX gain/(loss), interest and rediscount income/(expense) on current accounts excluding bank borrowings)

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Agenda

Overview



Türk Telekom Highlights



Leading
Operator in Türkiye
Integrated telecom
services



Serving
57.2mn
Subscribers



62%
Fibre connected
LTE base stations

2nd
player
In mobil market



99.8%
LTE
Population coverage



550k km
Fibre network in
81 cities



34.4mn
Fibre homepass
includes FTTC & FTTH/B



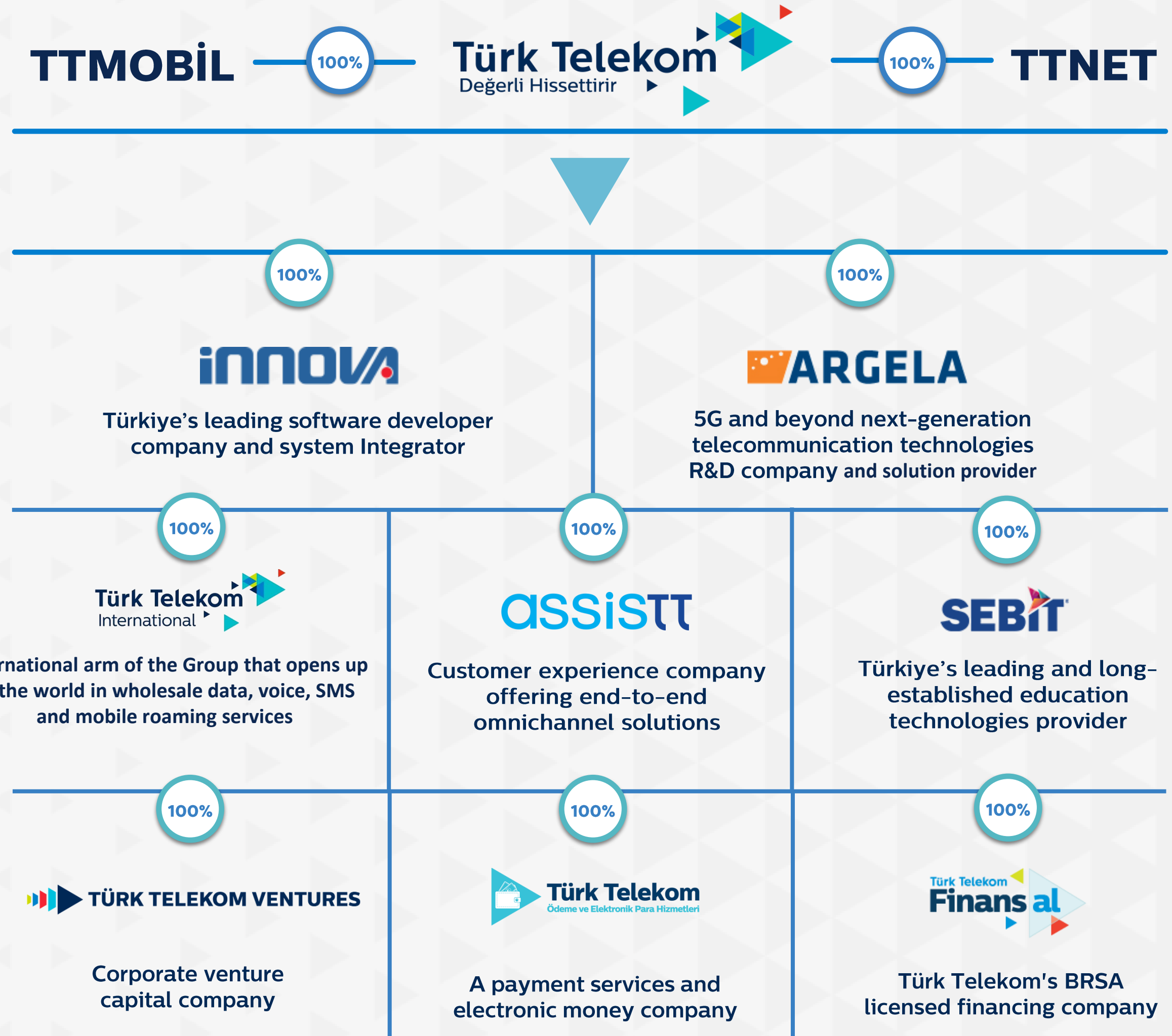
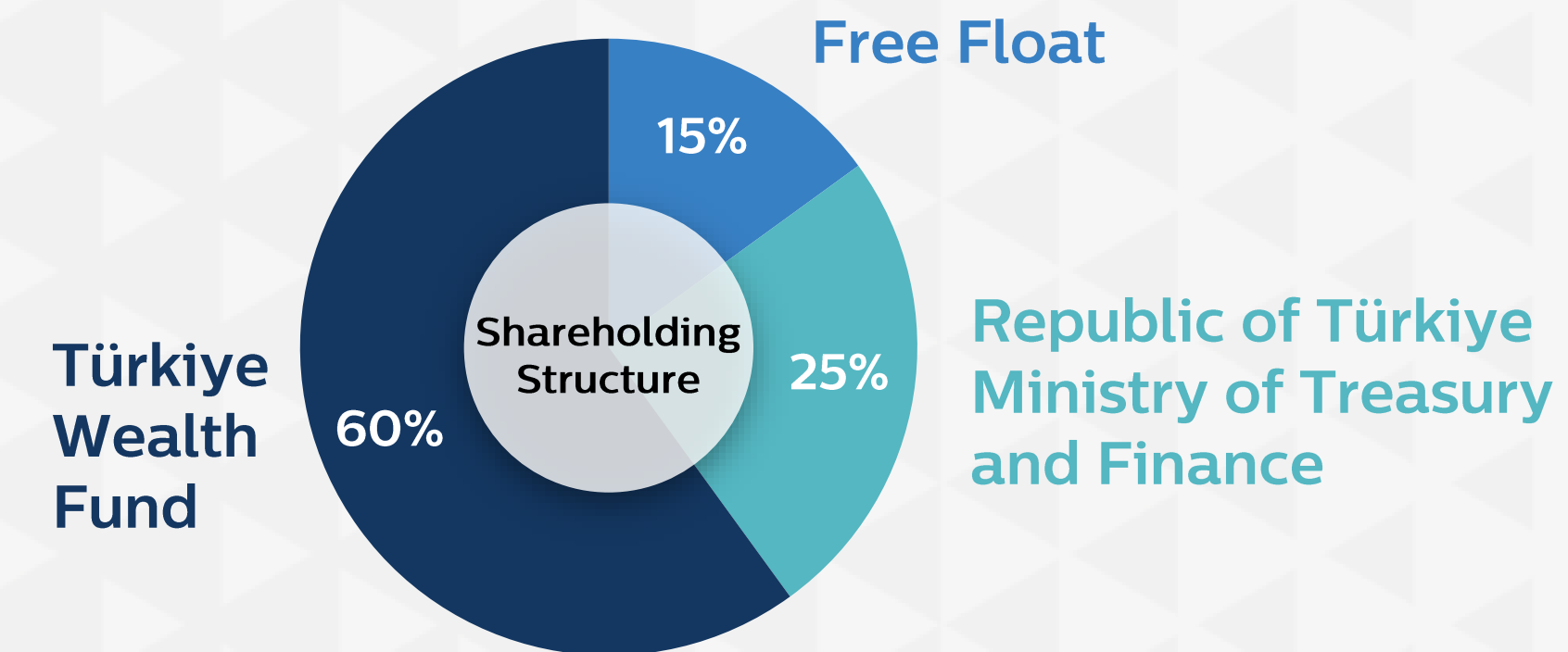
31,076
Number of employees

Shareholder Structure

Ownership and Corporate Structure

- 
60% of shares
 owned by Türkiye Wealth Fund.
- 
25% of shares
 owned by Republic of Türkiye Ministry of Treasury and Finance.
- 
15% of shares
 publicly traded on Borsa İstanbul since 2008.
 (of which 1.68% also owned by Türkiye Wealth Fund)

Shareholding Structure

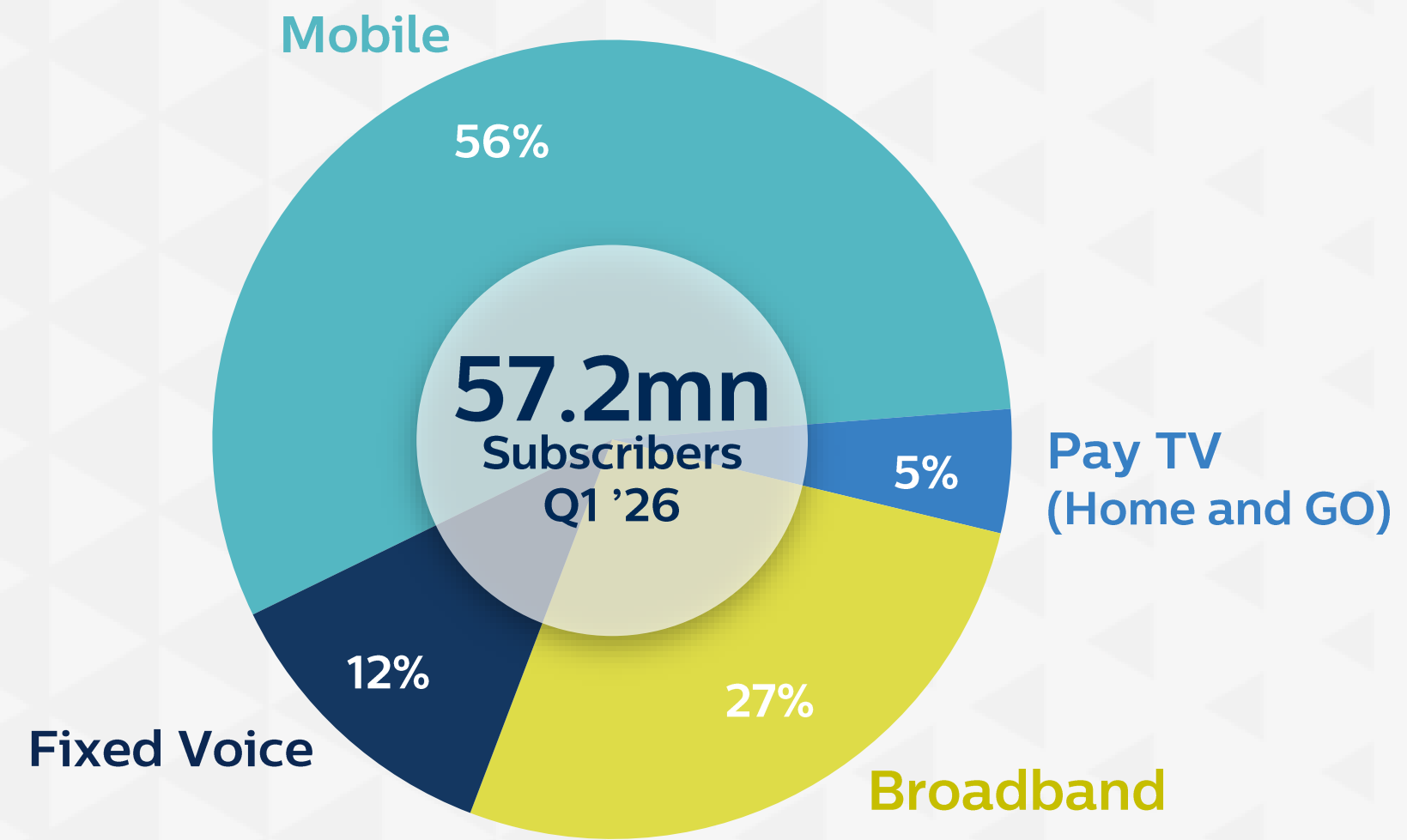


Creating More Value

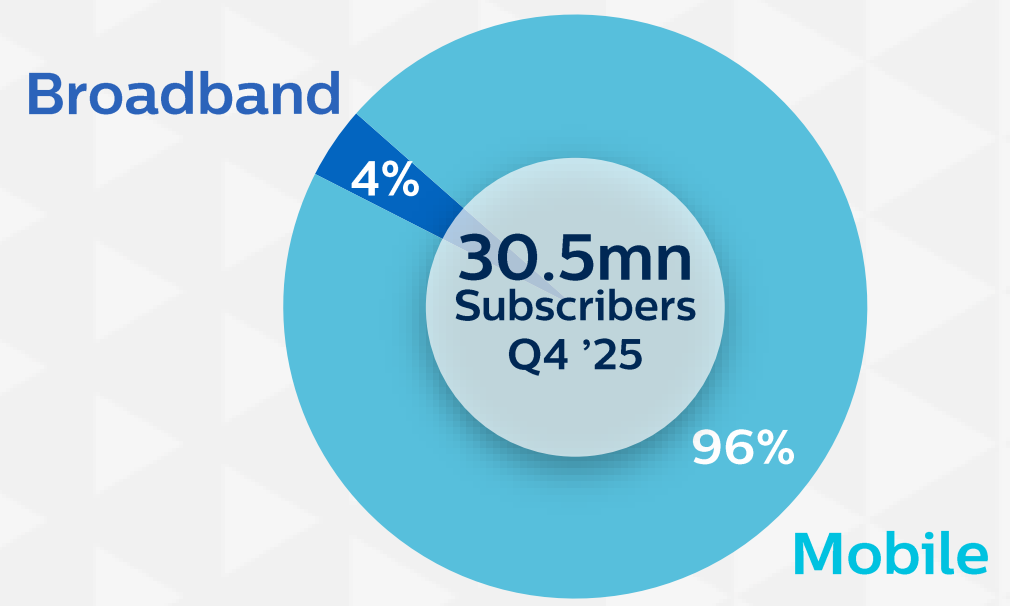


Diversified Portfolio & Strong Market Position

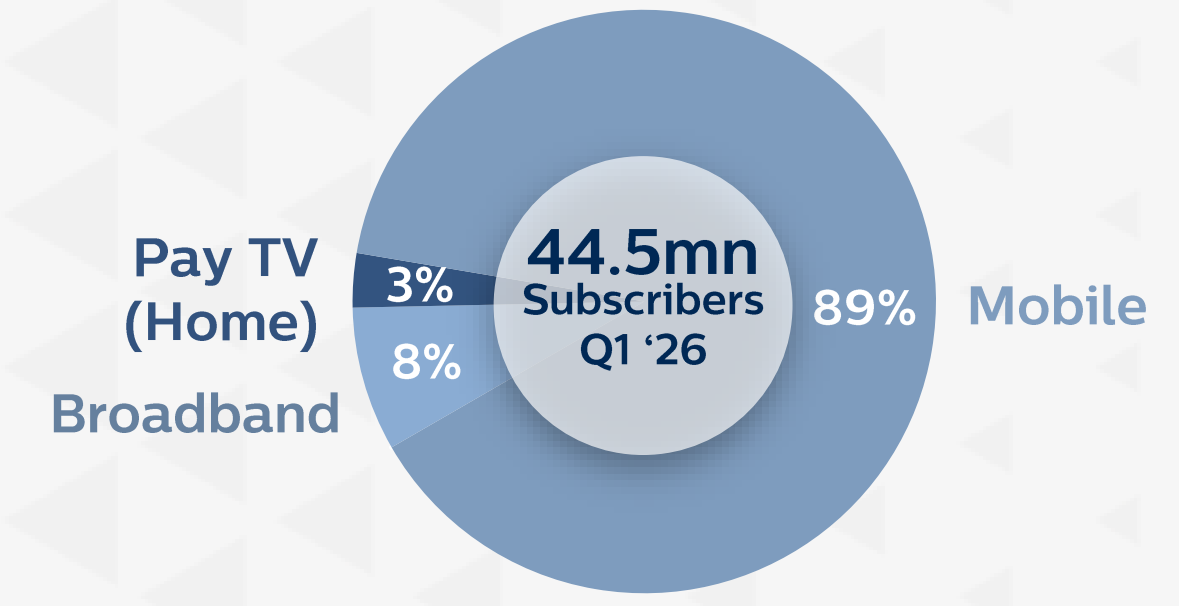
Diversified Subscriber Base



Vodafone

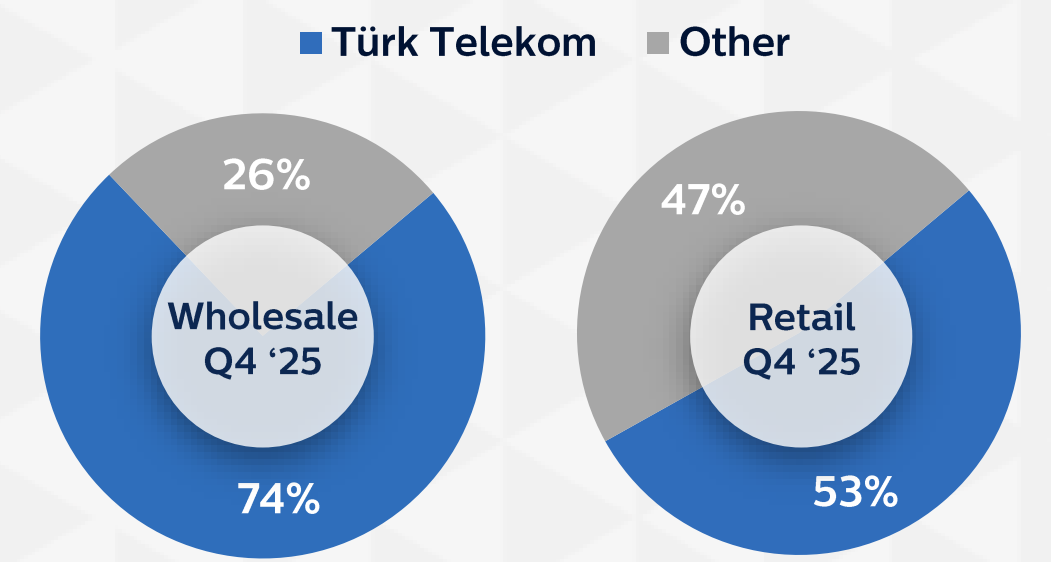


Turkcell

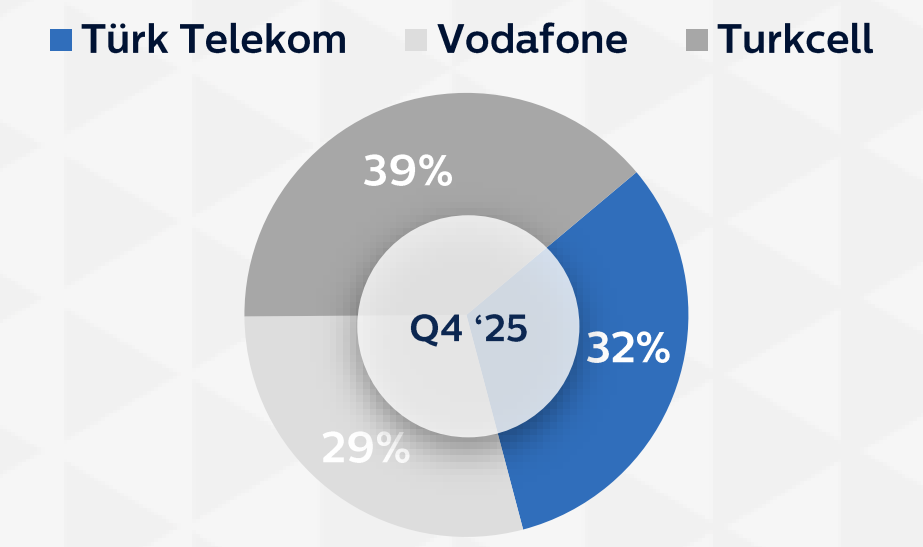


Subscriber Market Share

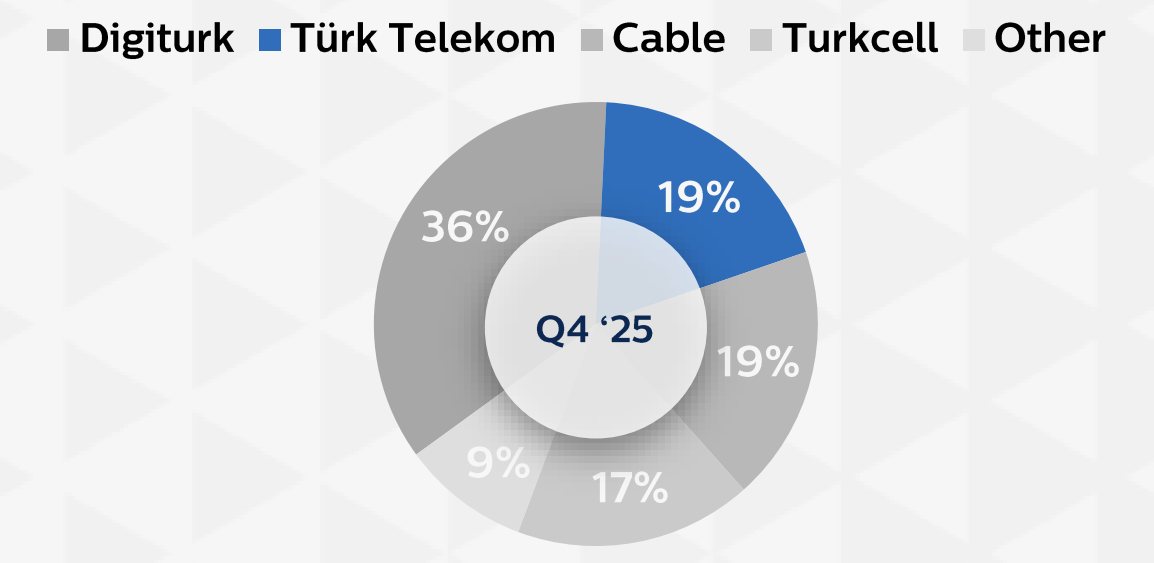
Fixed Broadband #1



Mobile #2



Pay TV #3



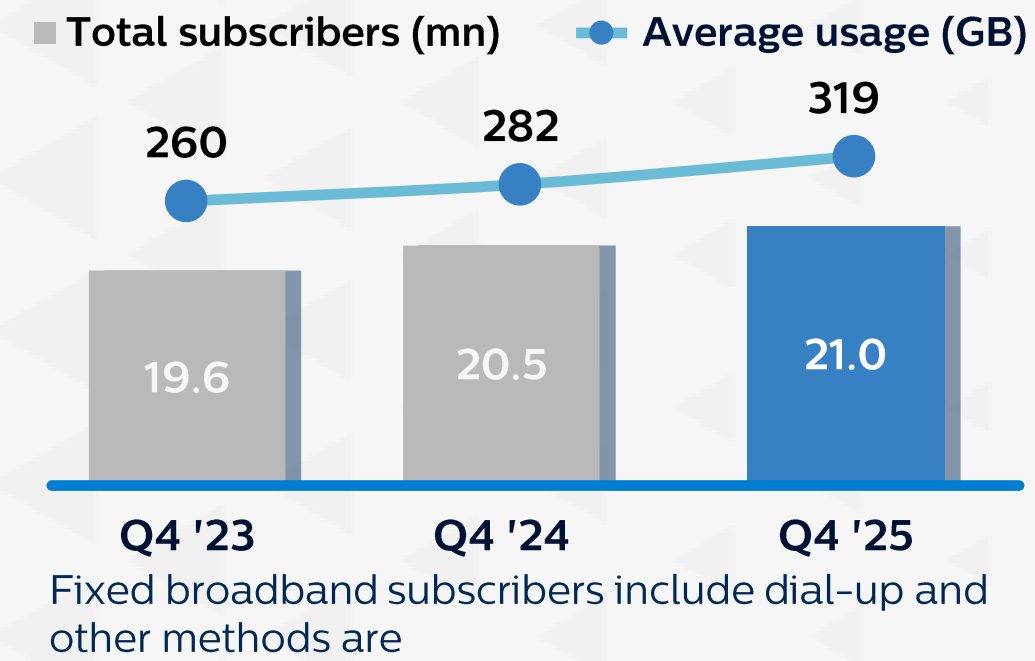
Turkcell and Vodafone data are from their own publications and ICTA.

Structurally Attractive Domestic Market

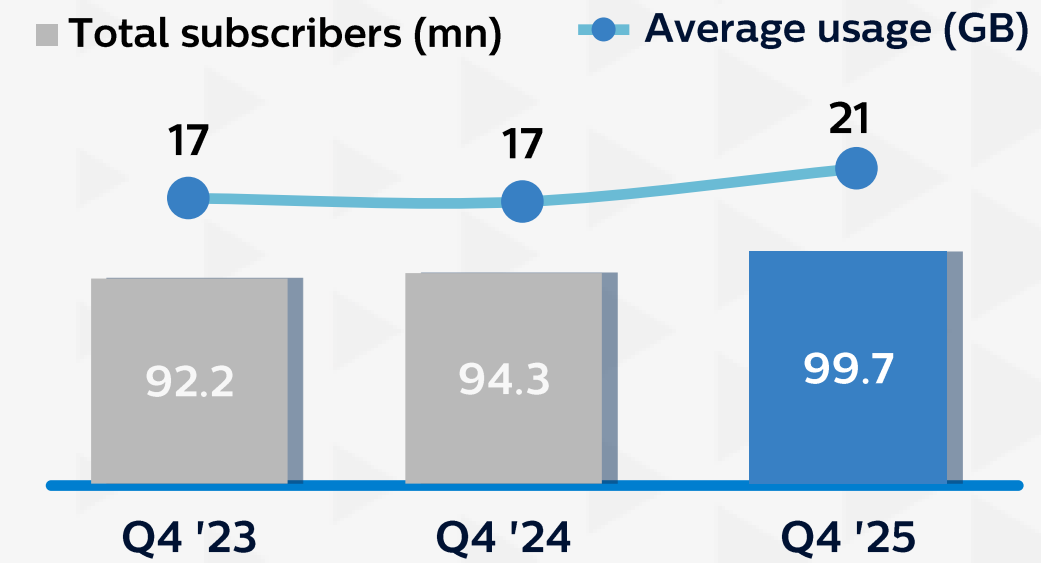


Growing Market Subscriber Base

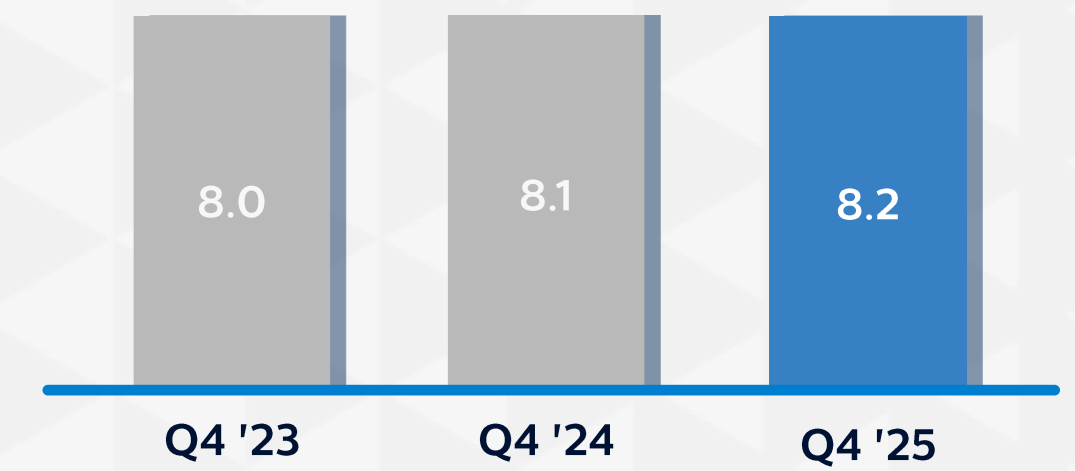
Fixed Broadband Subscribers & Avg. Monthly Data Usage



Mobile Subscribers

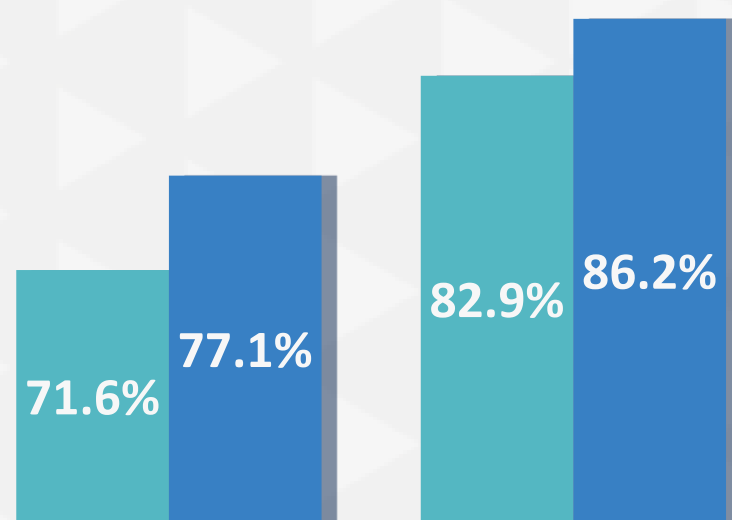


Pay TV Subscribers (mn)
(IPTV, DTH, Cable TV)



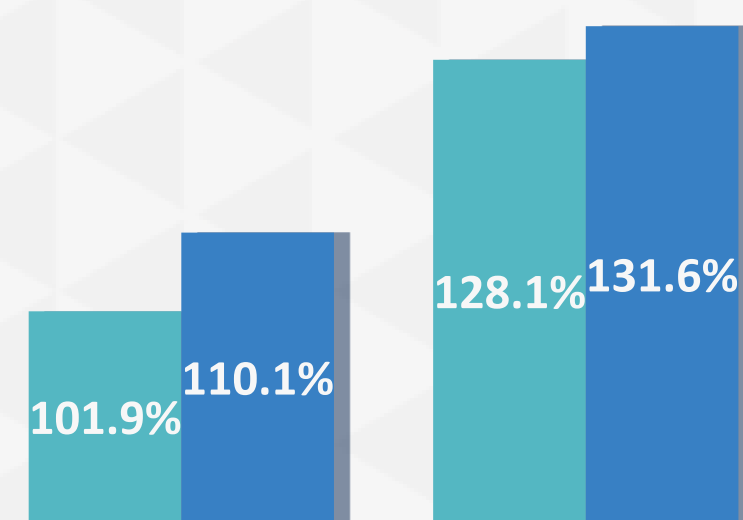
Large penetration upside across business segments

Household Penetration in Fixed Broadband



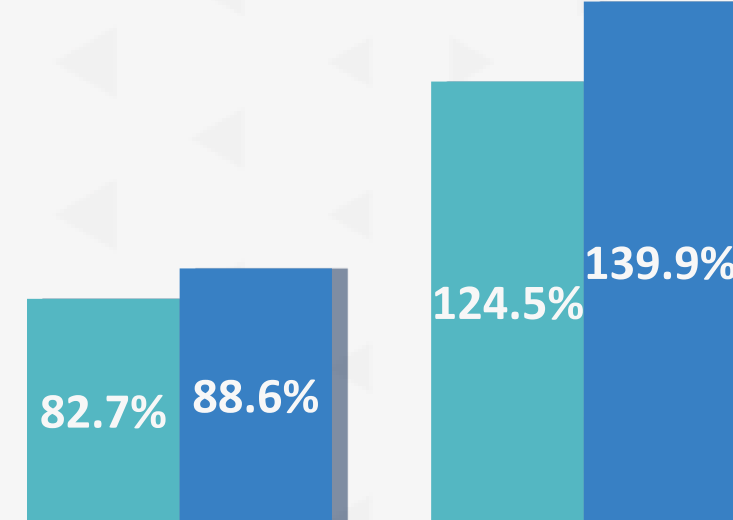
Türkiye Peer Average

Population Penetration in Mobile



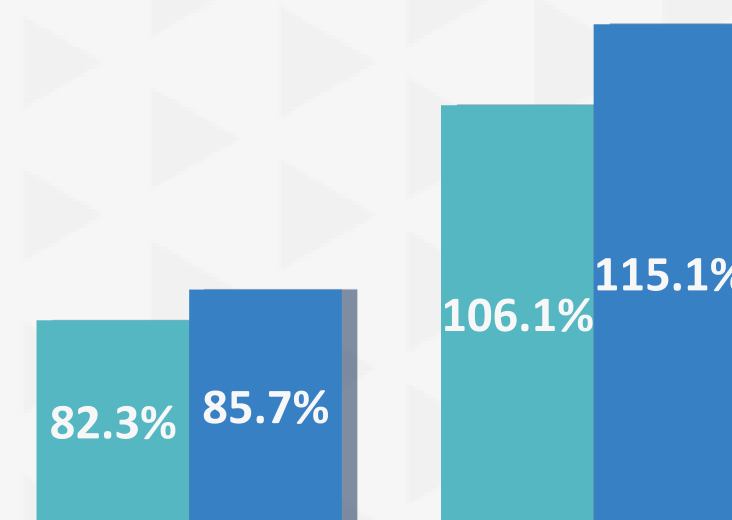
Türkiye Peer Average

Population Penetration in Mobile Broadband



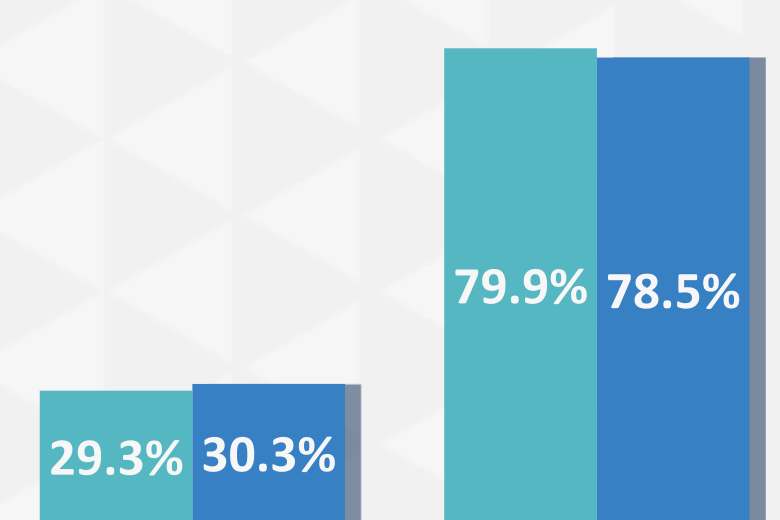
Türkiye Peer Average

Population Penetration in Smartphone



Türkiye Peer Average

Household Penetration in Pay TV



Türkiye Peer Average

2021 2024

Source: ICTA report and Analysys Mason

Notes:

- Fixed Broadband, Mobile, Smartphone and Pay TV peer average includes UK, Germany, France, Greece, Poland, Hungary and Czechia
- Mobile broadband peer average includes OECD countries.

Main Business Lines



Türk Telekom Solidified its Leading Position in Türkiye

Successfully renewed fixed line concession and launched 5G nationwide

Fixed Line

- Successfully **completed long term renewal of Concession** with the approval of Government
 - ▶ **Strategic Investment** - extended 24 years
 - ▶ **Achieved long term payment plan** and secured financing
- Offering **broad scope of digital services** including fixed line, wholesale & retail services, international connectivity, TV, and ICT
- Maintained **Türk Telekom's leading position** in the region & Türkiye
- Capitalizing on **+550k km fiber infrastructure and leading fixed network** across Türkiye

Mobile

- Successfully **acquired 5G spectrum and rolled-out nation-wide network**
 - ▶ Secured **highest spectrum** capacity per customer in Türkiye
- Strong start to the year with 5G launch and enabling **coverage across all provinces**
- Offering **high-speed, low-latency, and superior network performance** supported by **#1 position in fiber** (majority of 5G base stations connected via fiber)
- **Customers enjoying broad portfolio of 5G** tariffs, ranging from high-data packages to unlimited plans, along with campaigns to accelerate 5G-enabled device penetration



Fixed Broadband



Extensive Fibre Network

Türk Telekom Fibre Network

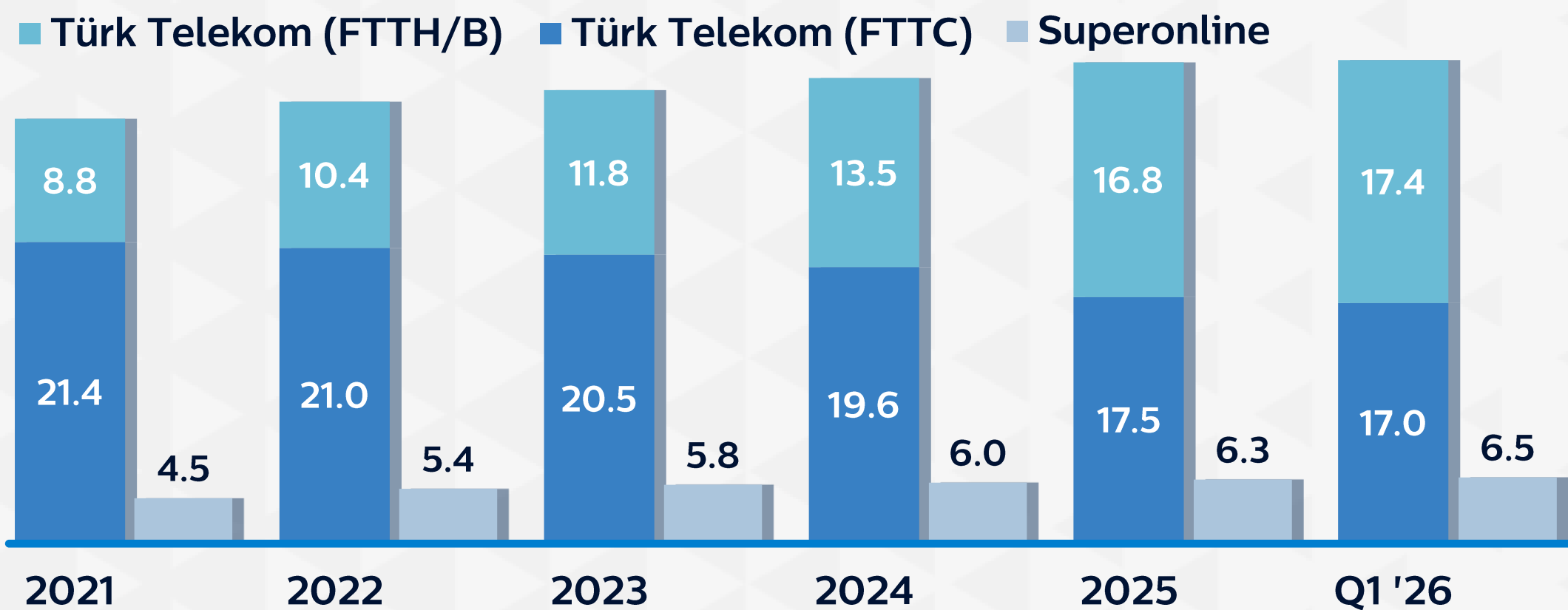


Superonline Fibre Network



- ▶ Presence in 30 cities of Türkiye
 - ▶ 67K fibre km rollouts
 - ▶ Wholesale customer of Türk Telekom
- As of Q4 '25

Fibre Homepass (mn)



Fibre Subscribers (mn)



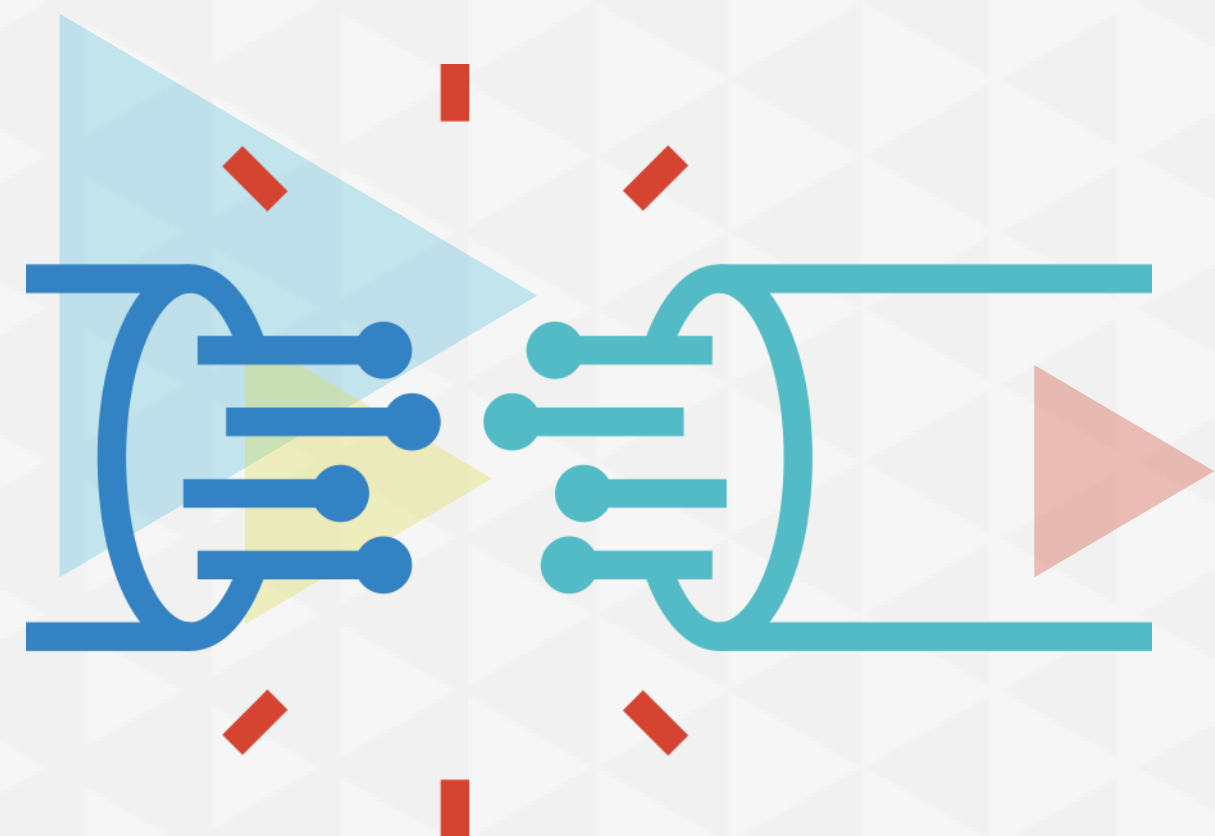
- ▶ Unrivalled fibre network
- ▶ Strong prospects for monetisation
- ▶ Best placed to benefit from move towards higher connection speeds
- ▶ Well-equipped to support 5G/small-cell deployment

Turkcell data is based on Turkcell's own publications.

Fibre subscribers include FTTH/B & FTTC subscribers.

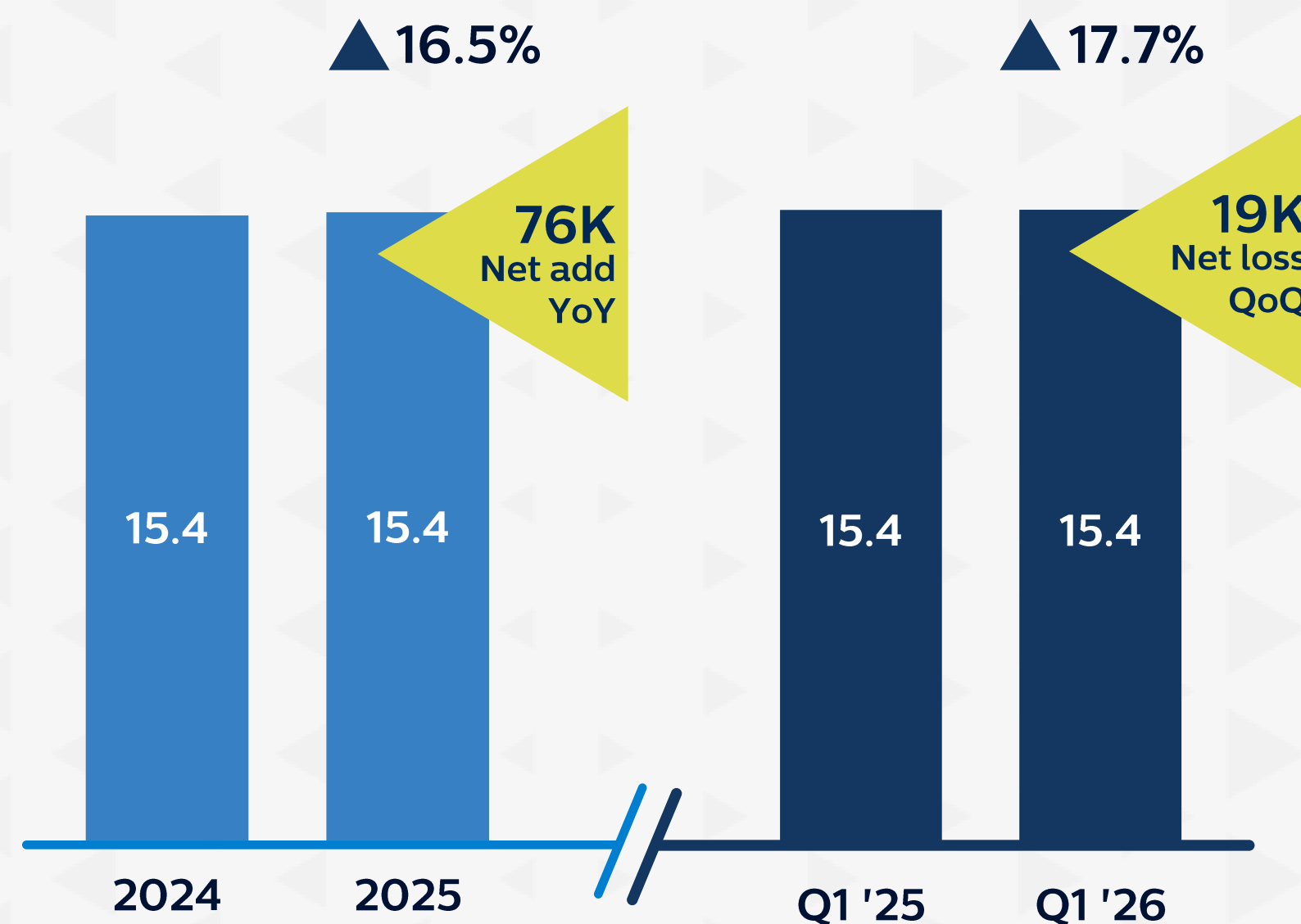
Fixed Broadband Performance

Significant revenue & ARPU growth driven by successful speed upsells



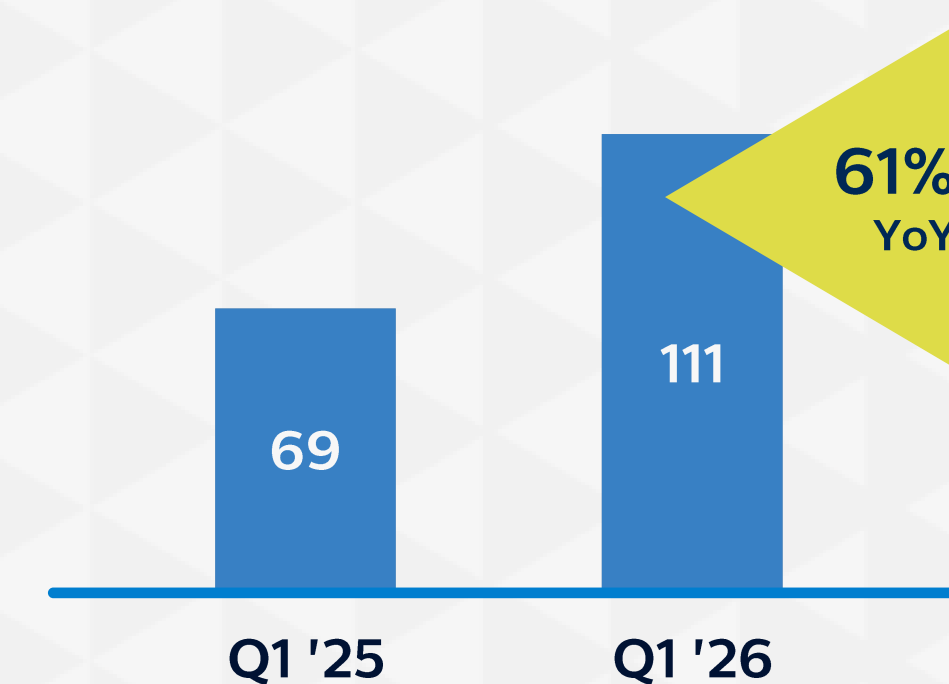
Subscribers & ARPU Growth

■ FBB Subscribers (mn)
▲ ARPU Growth (%)



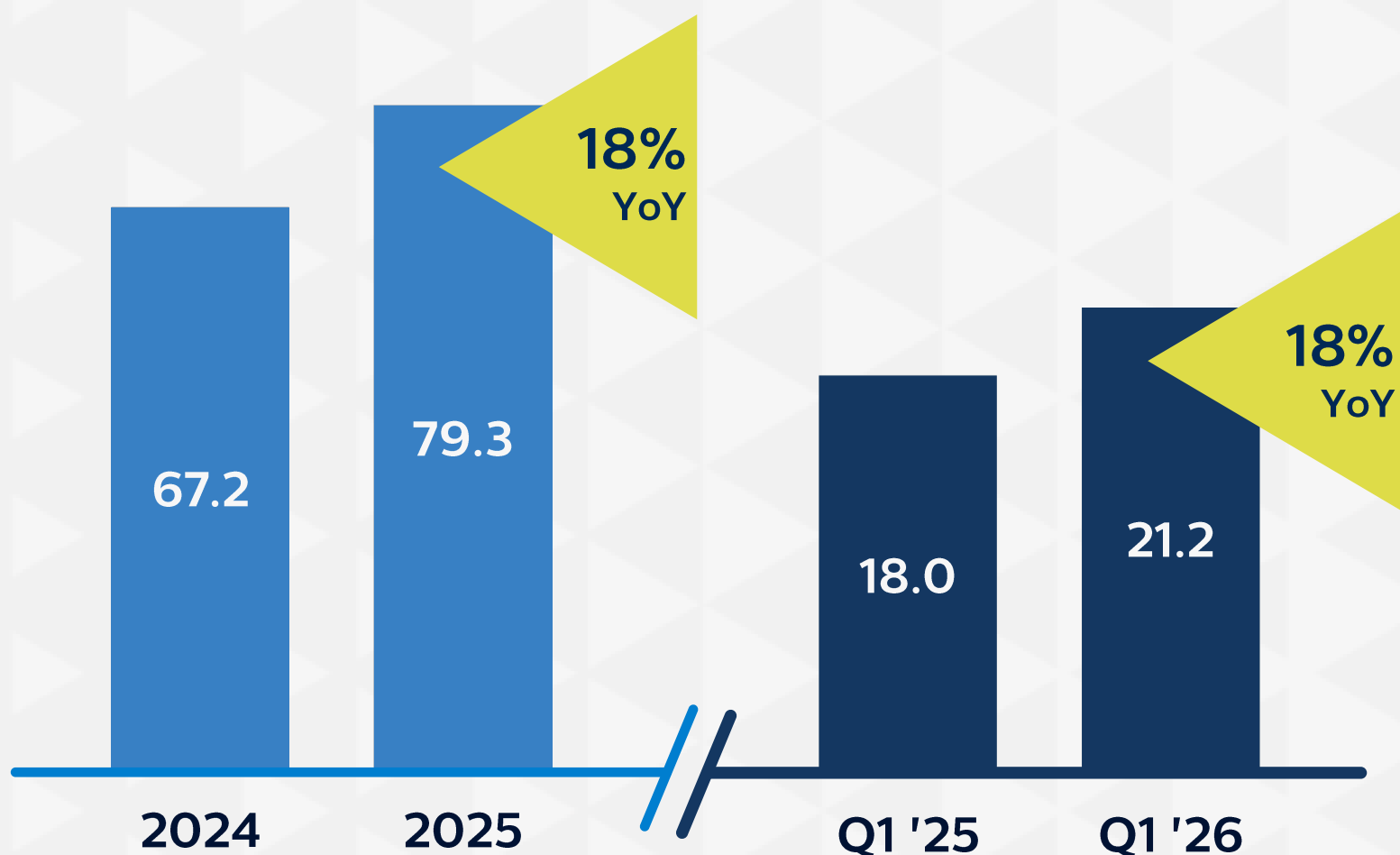
Subscribers' Average Speed (Mbps)

(Mbps)



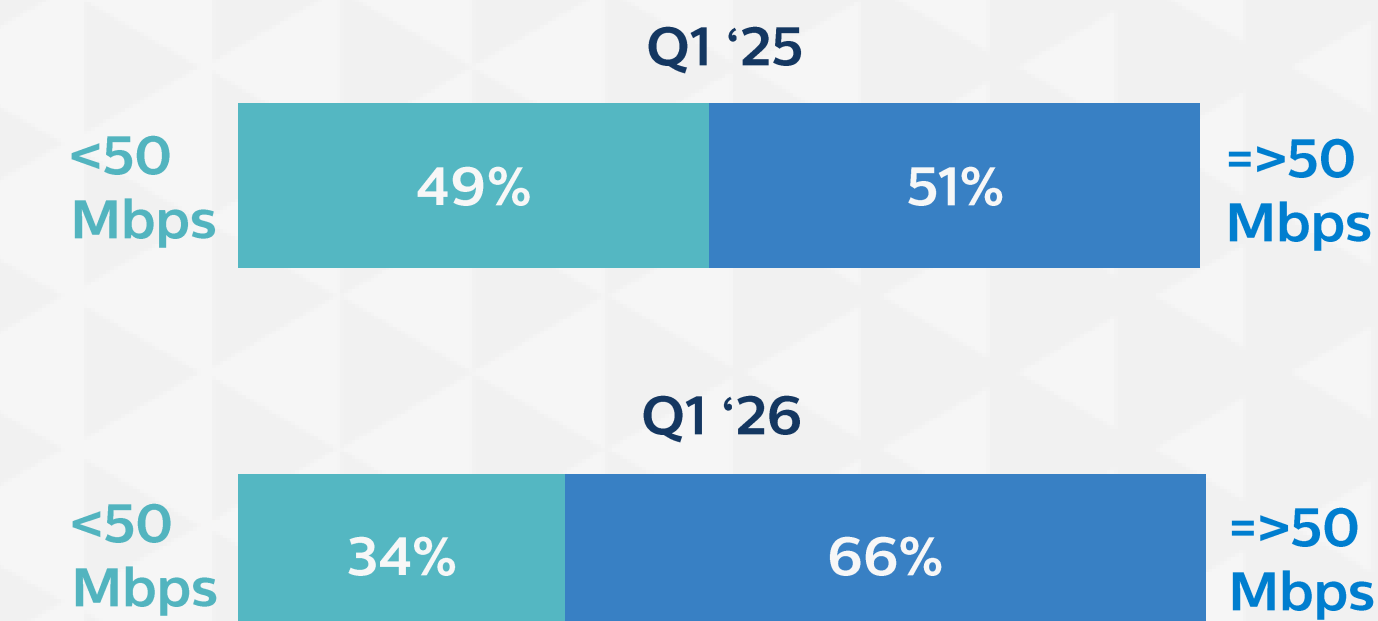
Fixed Broadband Revenue (TL bn)

(TL bn)



Subscriber Package Breakdown (% of Subscribers)

(% of Subscribers)



All figures presented at their values as of Q1 '26

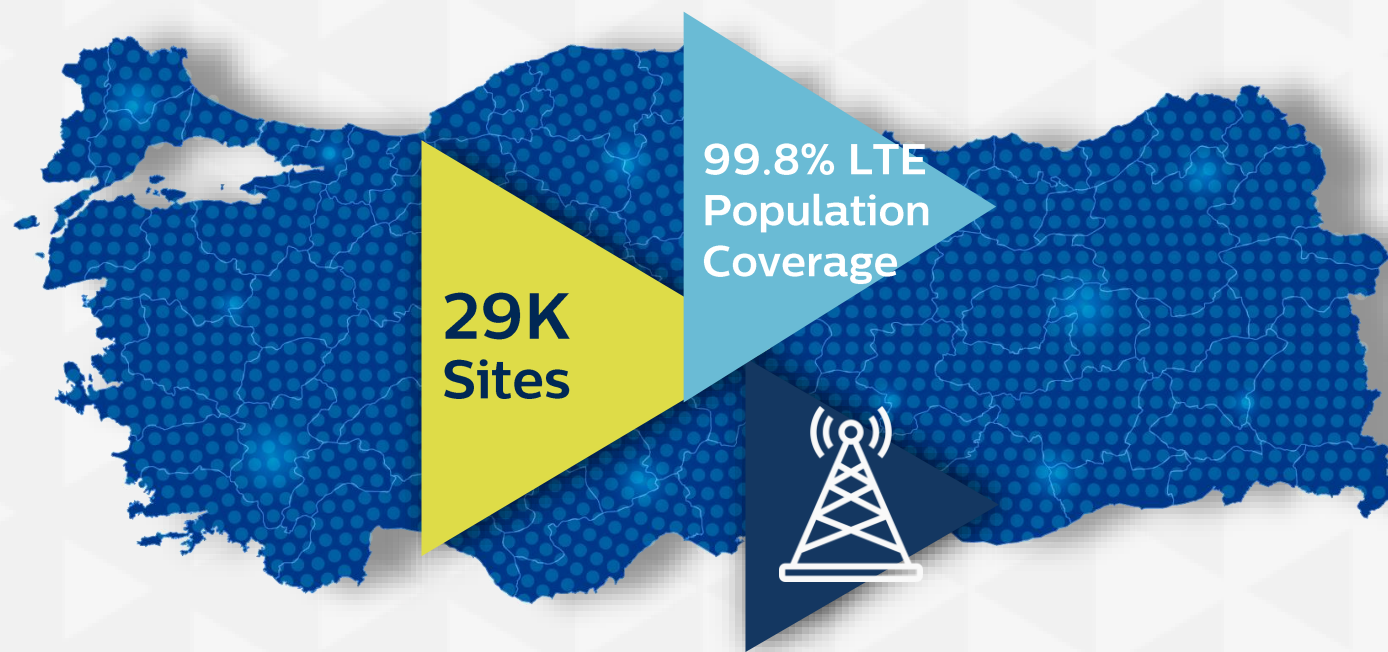
Mobile



Mobile Performance

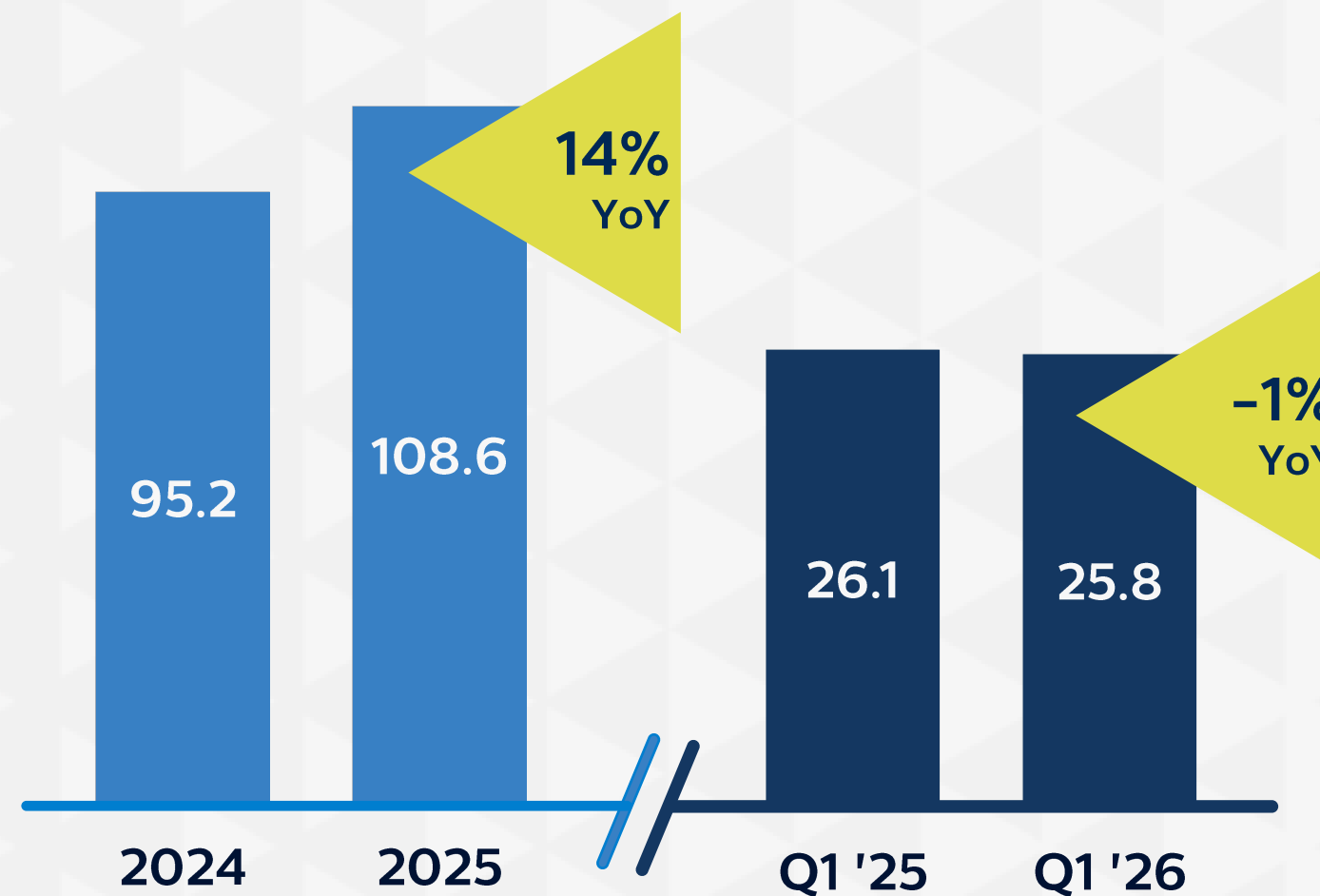
Record high postpaid net subscriber additions

Extensive Network Coverage



Mobile Revenue

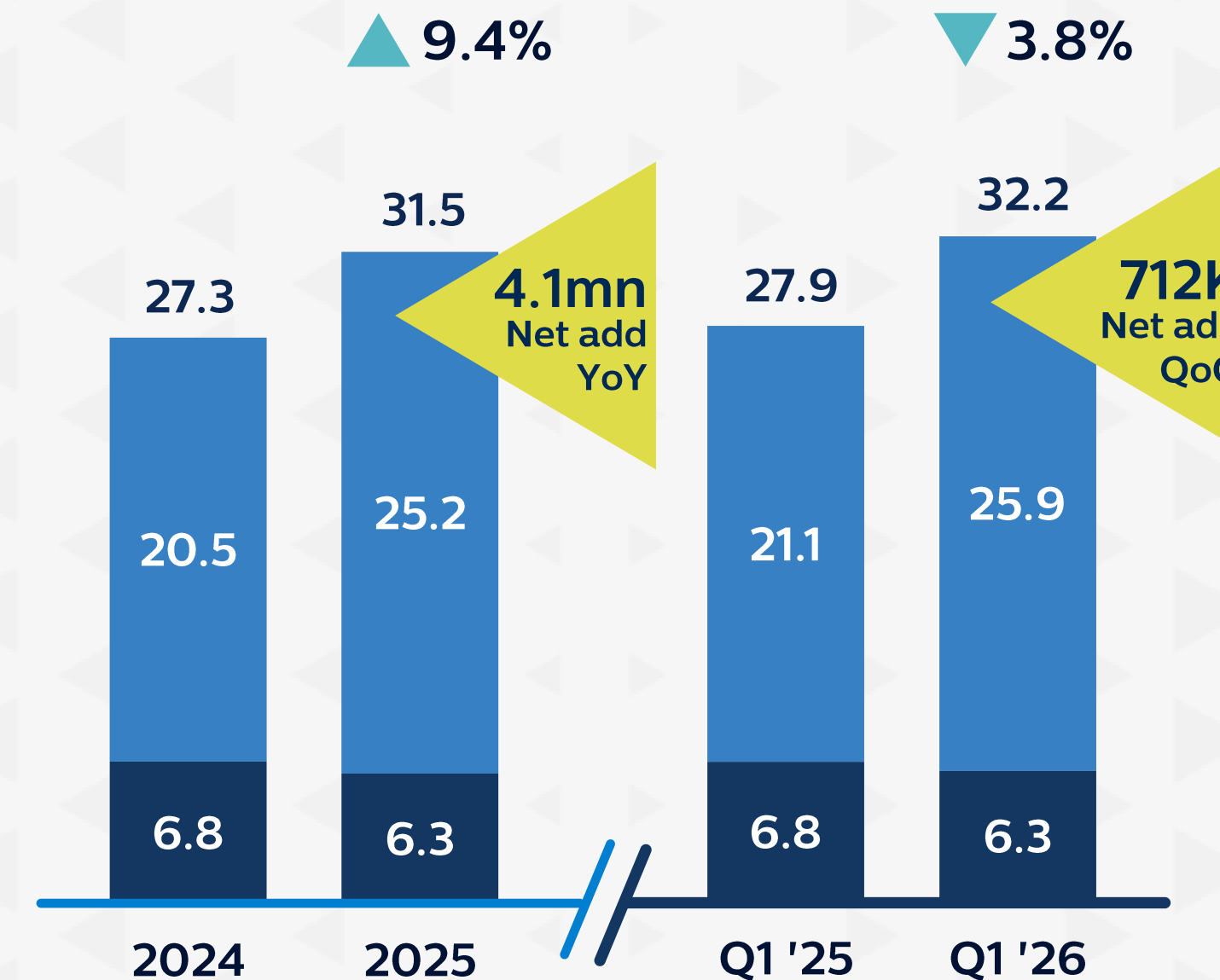
(TL bn)



All figures presented at their values as of Q1 '26

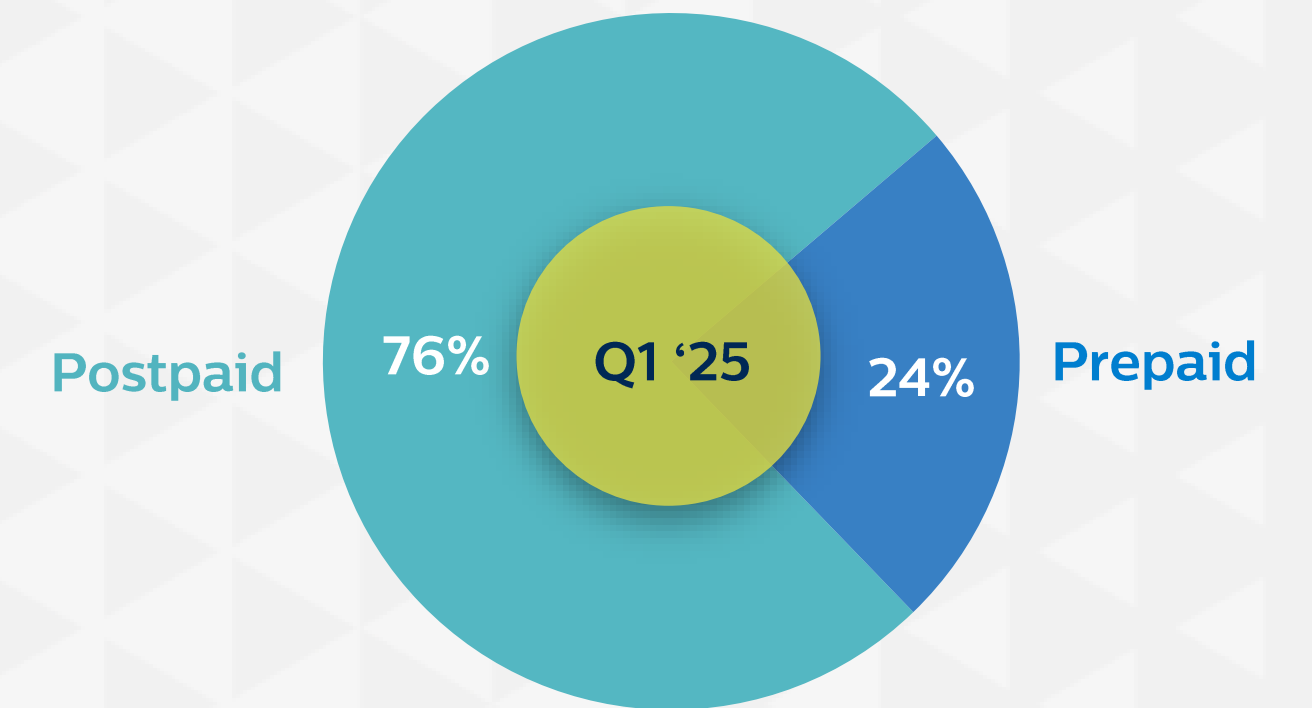
Subscribers & ARPU Growth

- Postpaid Subscribers (mn)
- Prepaid Subscribers (mn)
- ▲ Blended ARPU Growth (excl. m2m, %)

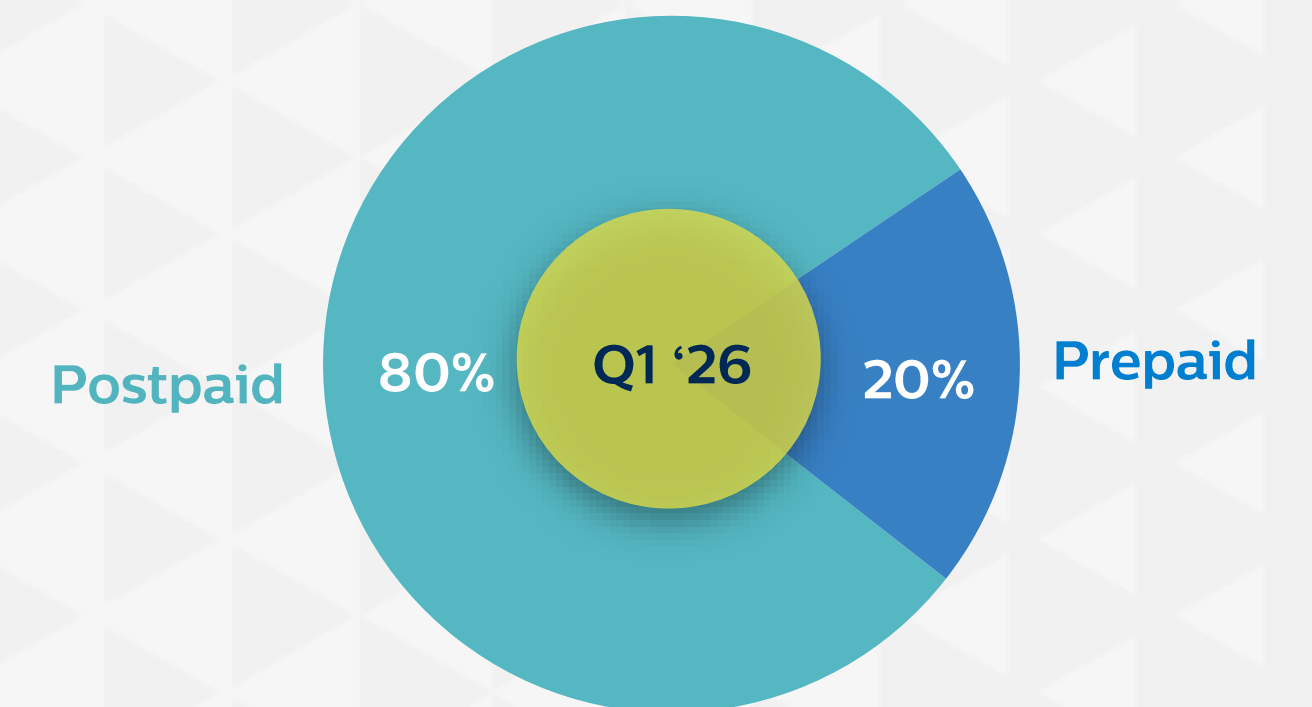


Q1 '26 mobile net adds include 571K m2m net adds

Subscribers Ratios



4.8 mn
Historic-high
Postpaid Net Add in LTM



5G Momentum Building on Strong Foundations

Türk Telekom launched 5G successfully

Roadmap



5G Spectrum Acquisition

Frequency	Bandwidth	Fee
700 MHz	20 MHz	\$425 mn
3.5 GHz	120 MHz	\$669 mn
	140 MHz	\$1,094 mn

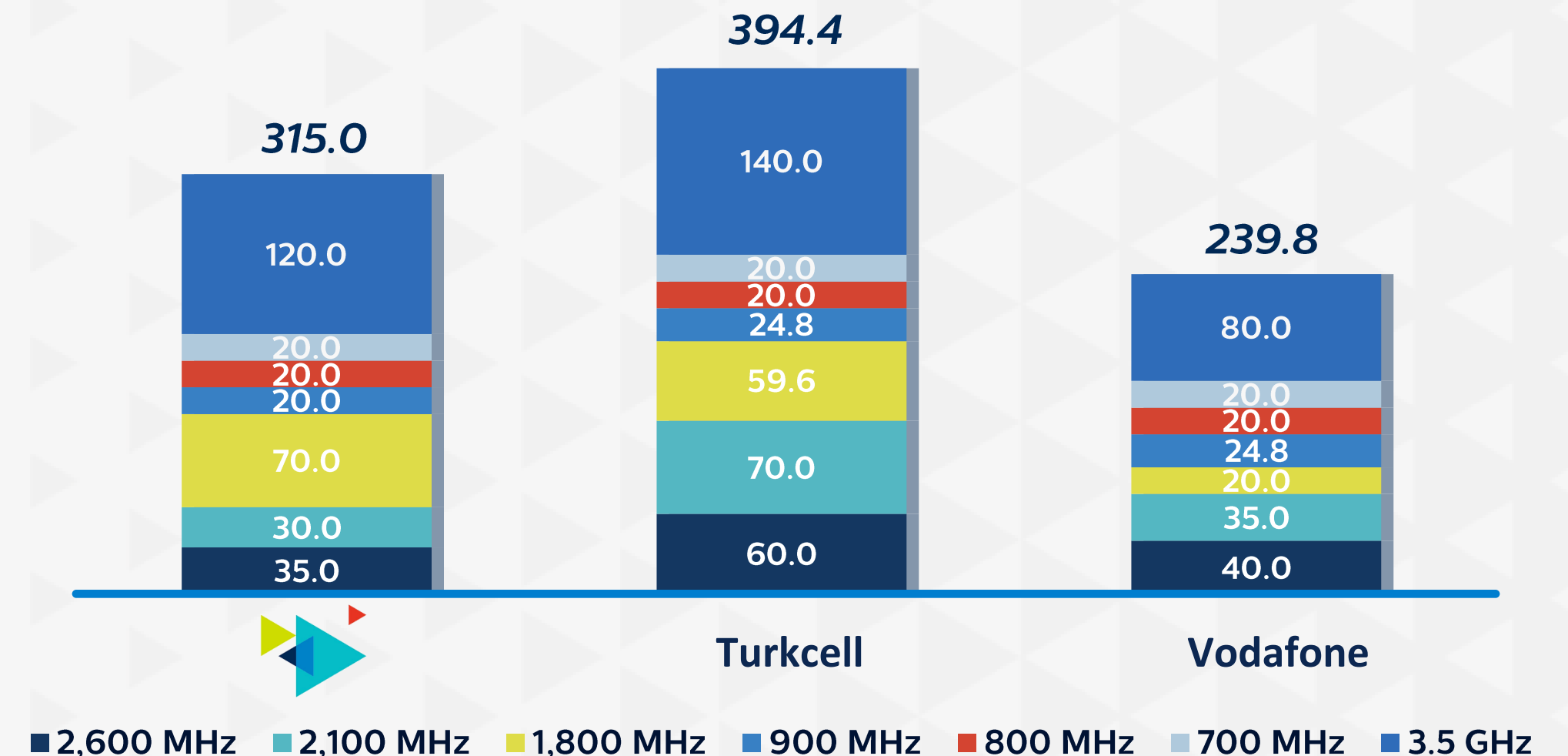
Of the three equal installments, the January 2026 installment has been paid, and the remaining installments are due in December 2026 and May 2027.

Fees exclude 20% VAT

Strong Foundations in 5G

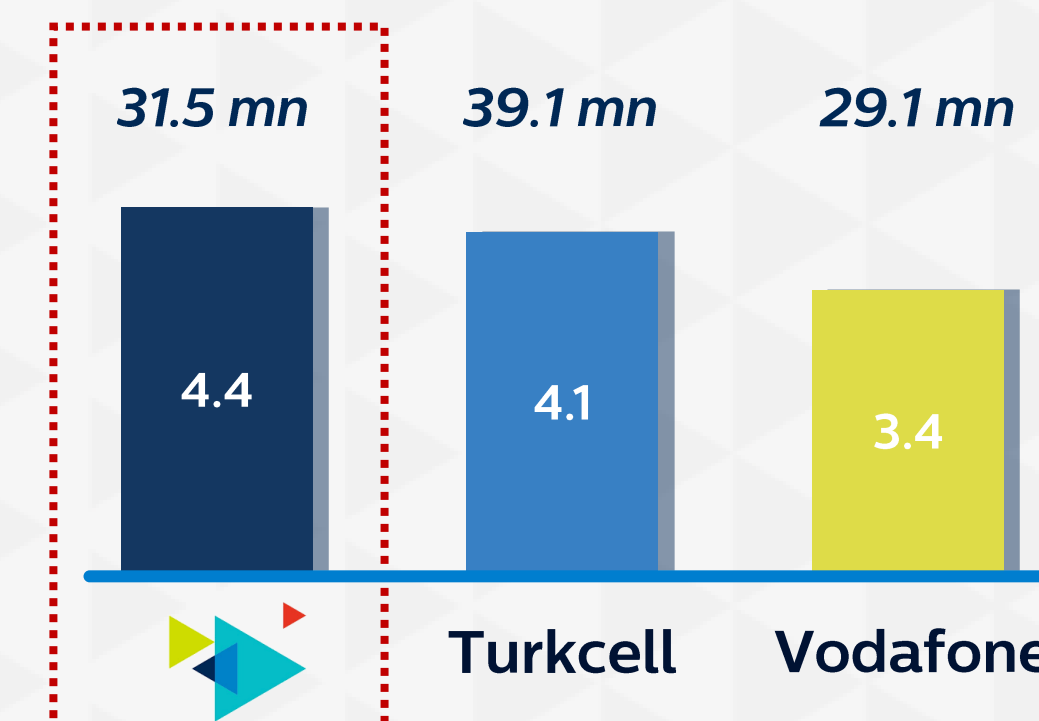
- Nationwide commercial 5G launch delivering high-speed and ultra-low latency connectivity
- Highest spectrum capacity per subscriber supporting superior network performance
- Strong fiber backbone with 550K km network and 62% fiberized base stations enabling scalable and resilient 5G
- Growing 5G device penetration and enriched digital services supporting ARPU growth and monetization

Superior Spectrum Allocation



Highest 5G Spectrum Capacity Per Subscriber

(MHz/mn Subscriber)



Mobile subscriber numbers are from the Q4 '25 ICTA report.

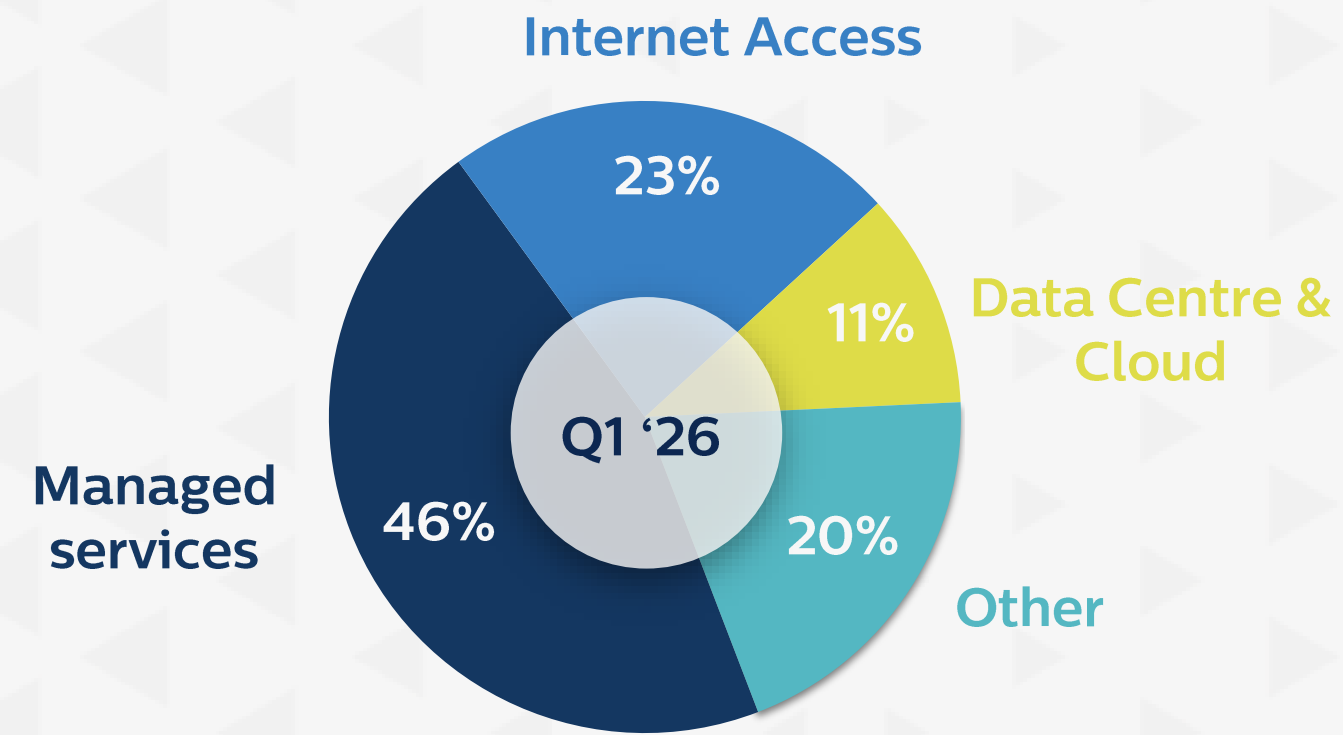
Corporate Data



Corporate Data

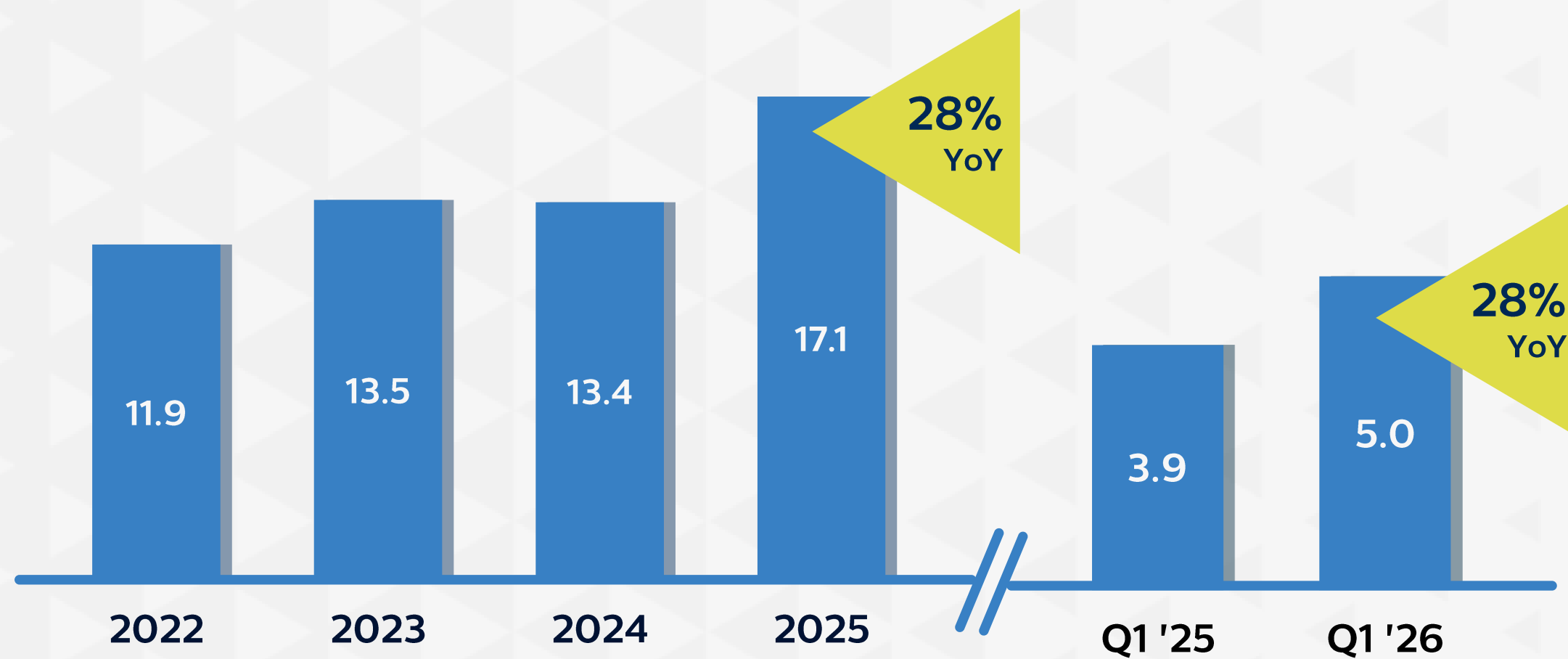


Corporate Data Revenue Share



Corporate Data Revenue

(bn TL)



All figures presented at their values as of Q1 '26



Türk Telekom Security

Türkiye's Market Leader in Cybersecurity Services



Türk Telekom Data Centre & Cloud

Data Centres

- First Mover and 2nd largest capacity in Türkiye
- Strategically positioned to capture growing demand

Cloud

- International Certifications
- Supporting enterprises' digital transformation journey



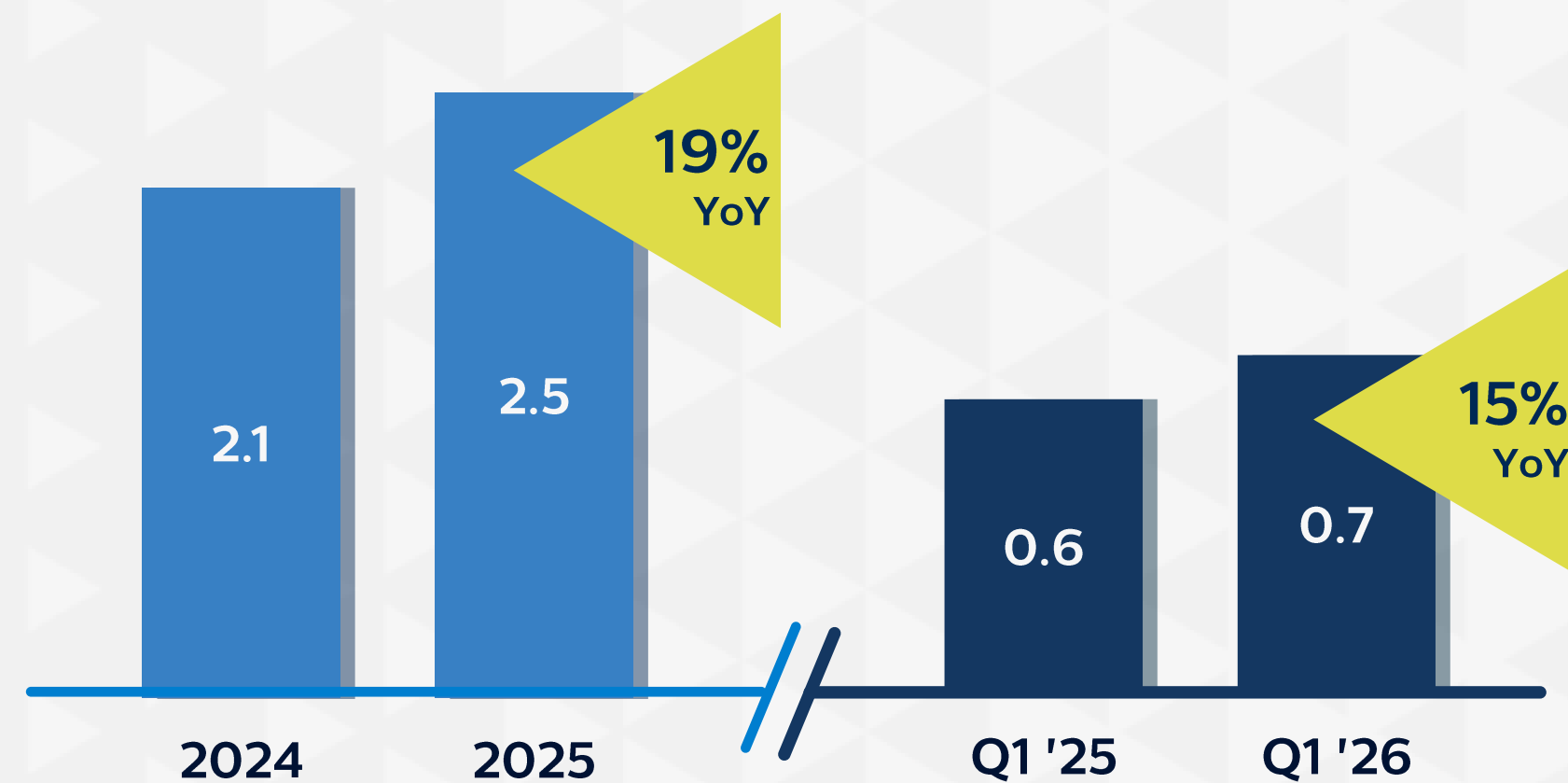
TV

TV Performance



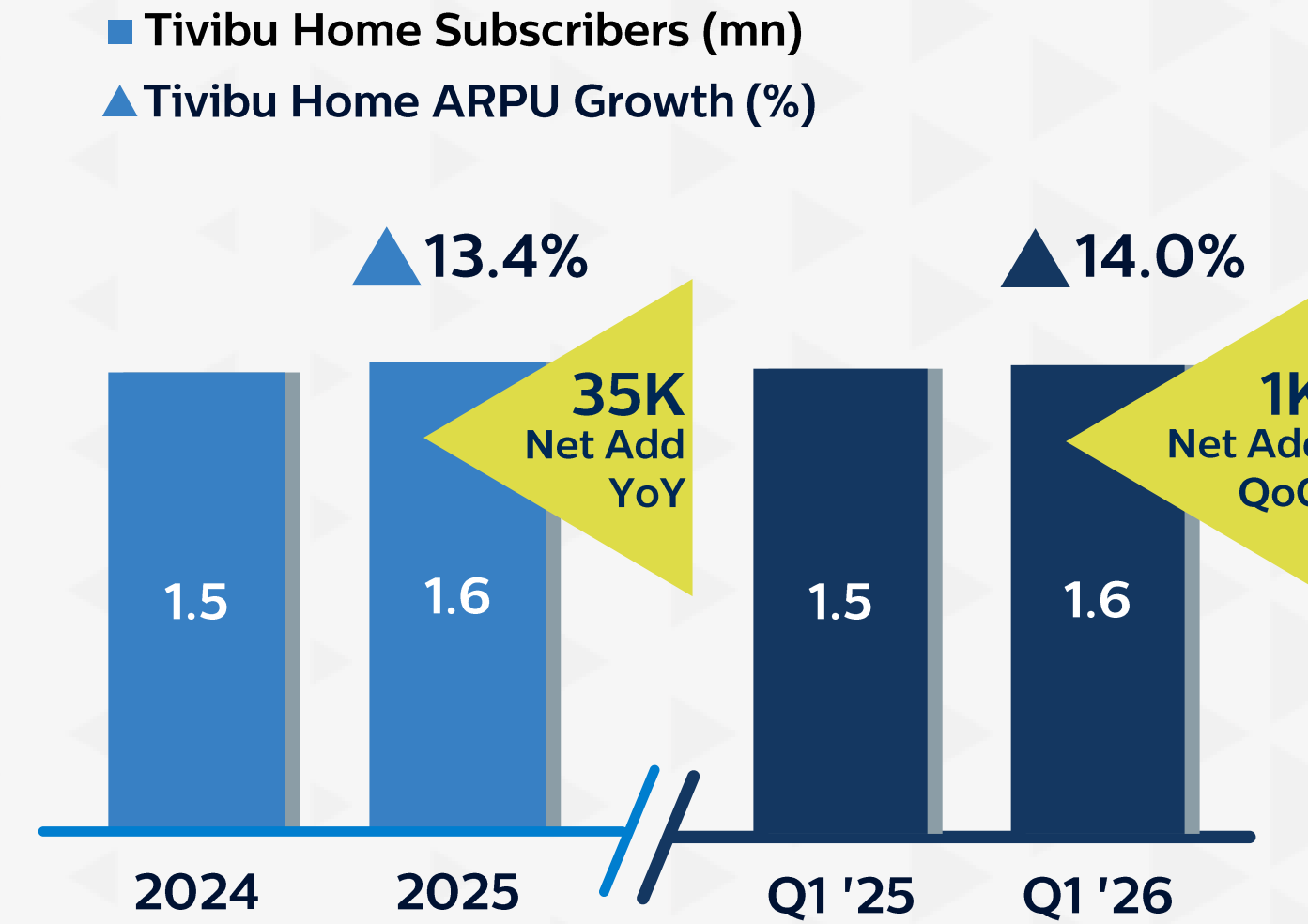
TV Revenue

(TL bn)



All figures presented at their values as of Q1 '26

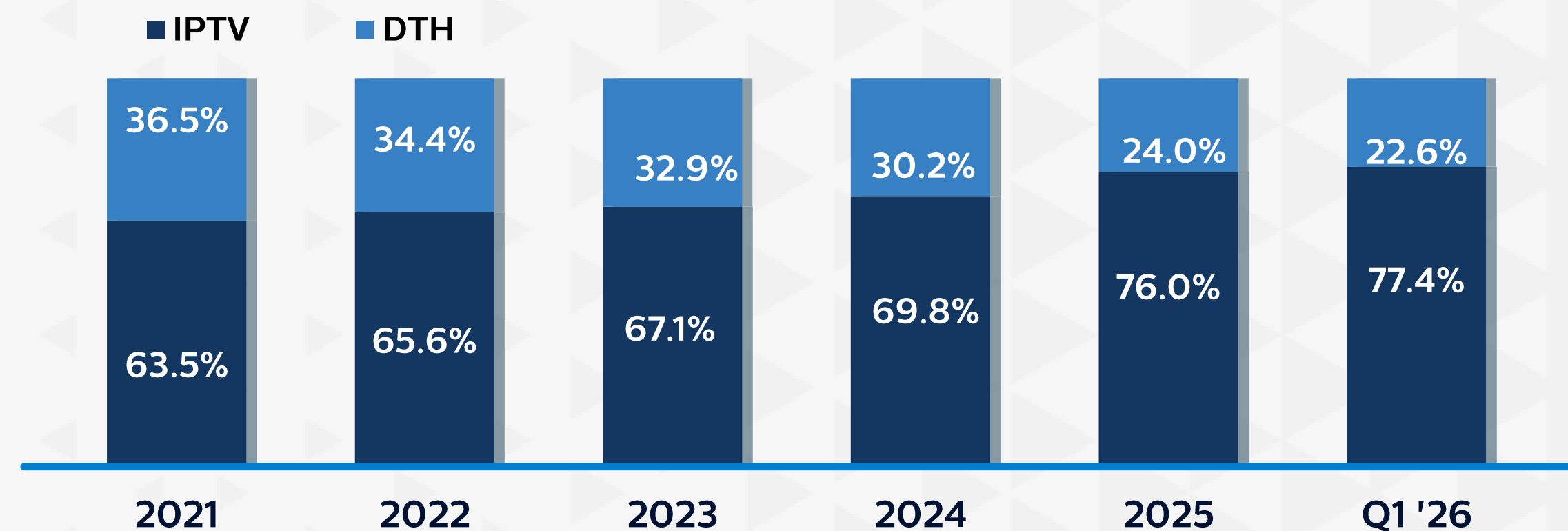
Tivibu Home Subscribers & ARPU



Platform



IPTV & DTH Subscriber Shares in Tivibu Home Base





2026 Q1 Highlights

Financial & Operational Overview

Strong revenue growth & margin expansion with solid profitability

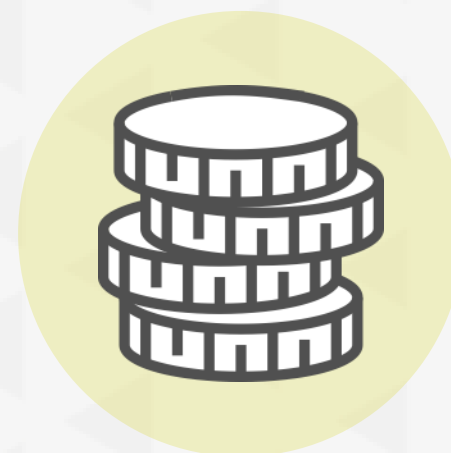
2026 Q1 Highlights



Total Subscribers

57.2 mn

▲ 7% YoY



Revenue

TL 64.9 bn

▲ 9% YoY

TL 61.2 bn (Exc. IFRIC 12)

▲ 6% YoY



EBITDA

TL 27.4 bn

▲ 17% YoY



EBITDA Margin

42.3%

▲ 300bps YoY



Net Income

TL 10.5 bn

▲ 56% YoY



Free Cash Flow

TL 1.7 bn

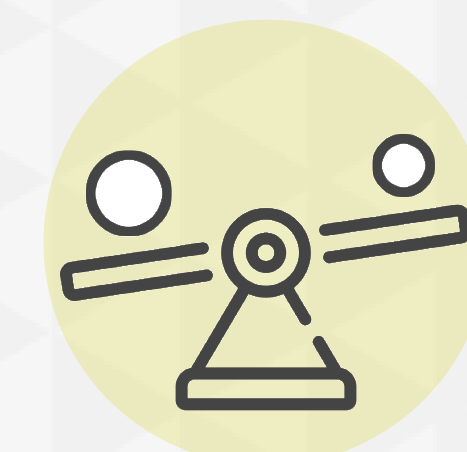
TL 10.3 bn in Q1'25



CAPEX

TL 17.0 bn

▲ 70% YoY



Net Leverage

0.58x

Q4'25 0.60x

Free cash flow is defined as net cash provided by operating and investing activities from operations.

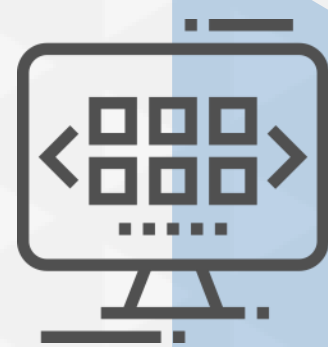
Free cash flow excludes concession and 5G license-related payments. Including the related payments, free cash flow was TL -47 billion.

Capex excludes spending for the solar investments, concession extension and license fees. Including these items, capex was TL 155.2 billion.

Net leverage excludes concession and 5G license-related payments. Including the related payments, net leverage was 0.99x.

Net Subscriber Additions

Strong net subscriber growth driven by continued net additions in mobile



Fixed Broadband

-19K

1.4% monthly churn rate

Q1 '26

+5K

LTM



Mobile

+712K

1.7% monthly churn rate

Q1 '26

+4.3 mn

LTM



Fixed Voice

-163K

Q1 '26

-730K

LTM

57.2mn

Total subscribers

Total net additions

+613K

in Q1 '26

+3.6 mn

in LTM

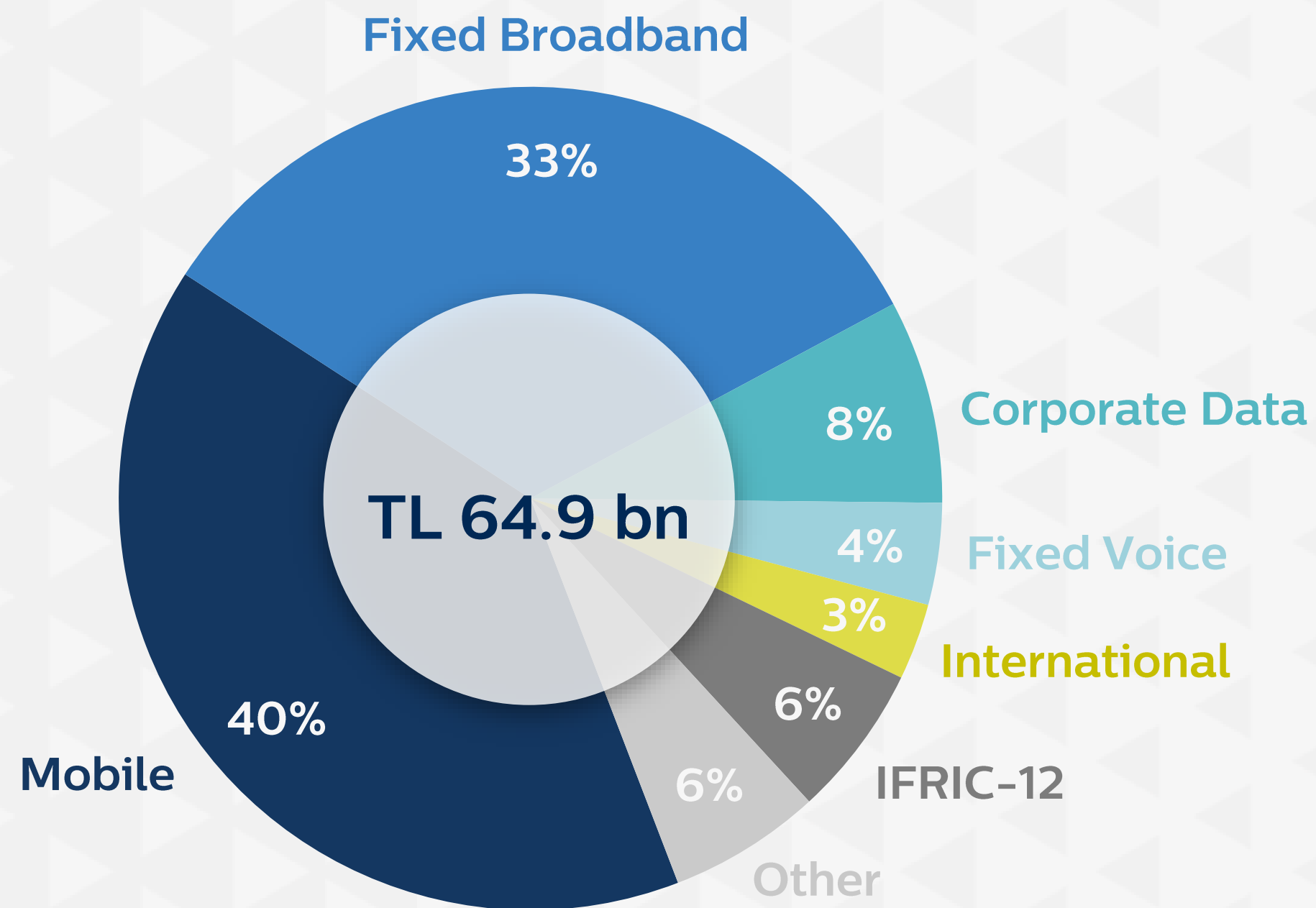


Q1'26 mobile net adds include 571K m2m net adds

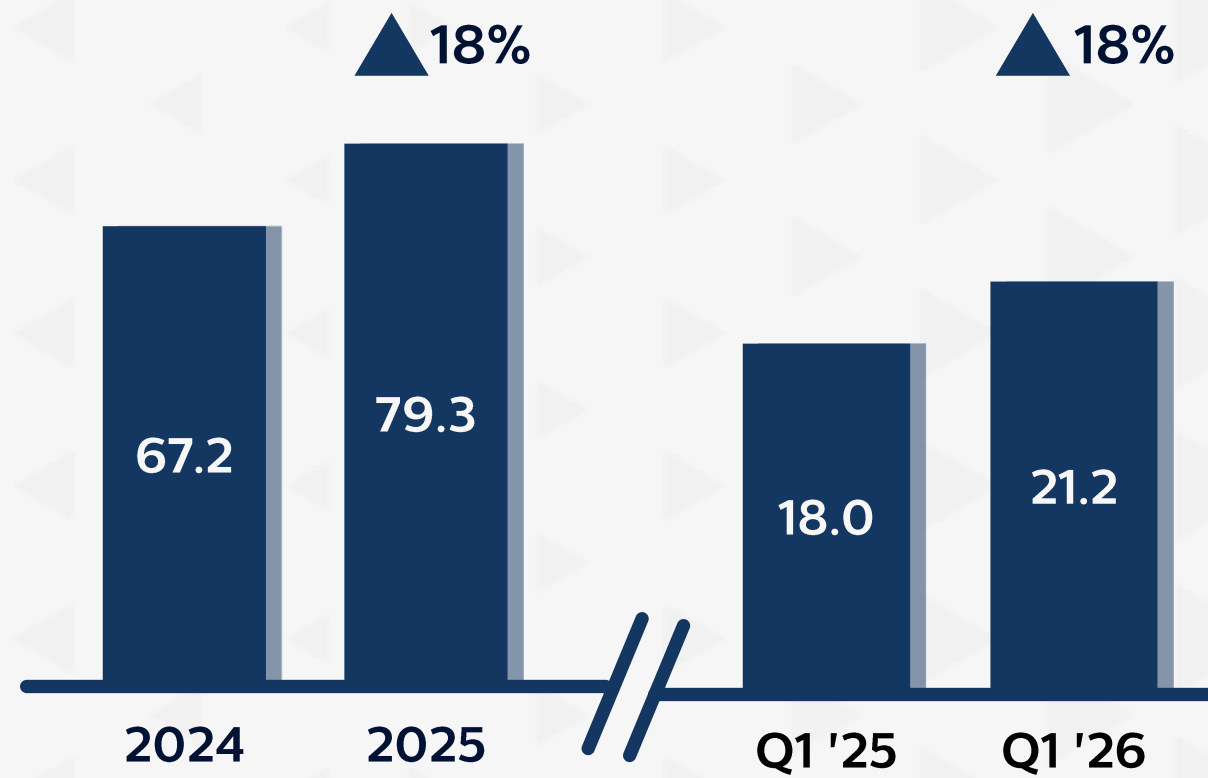
Total net adds Include Tivibu

Business Segments

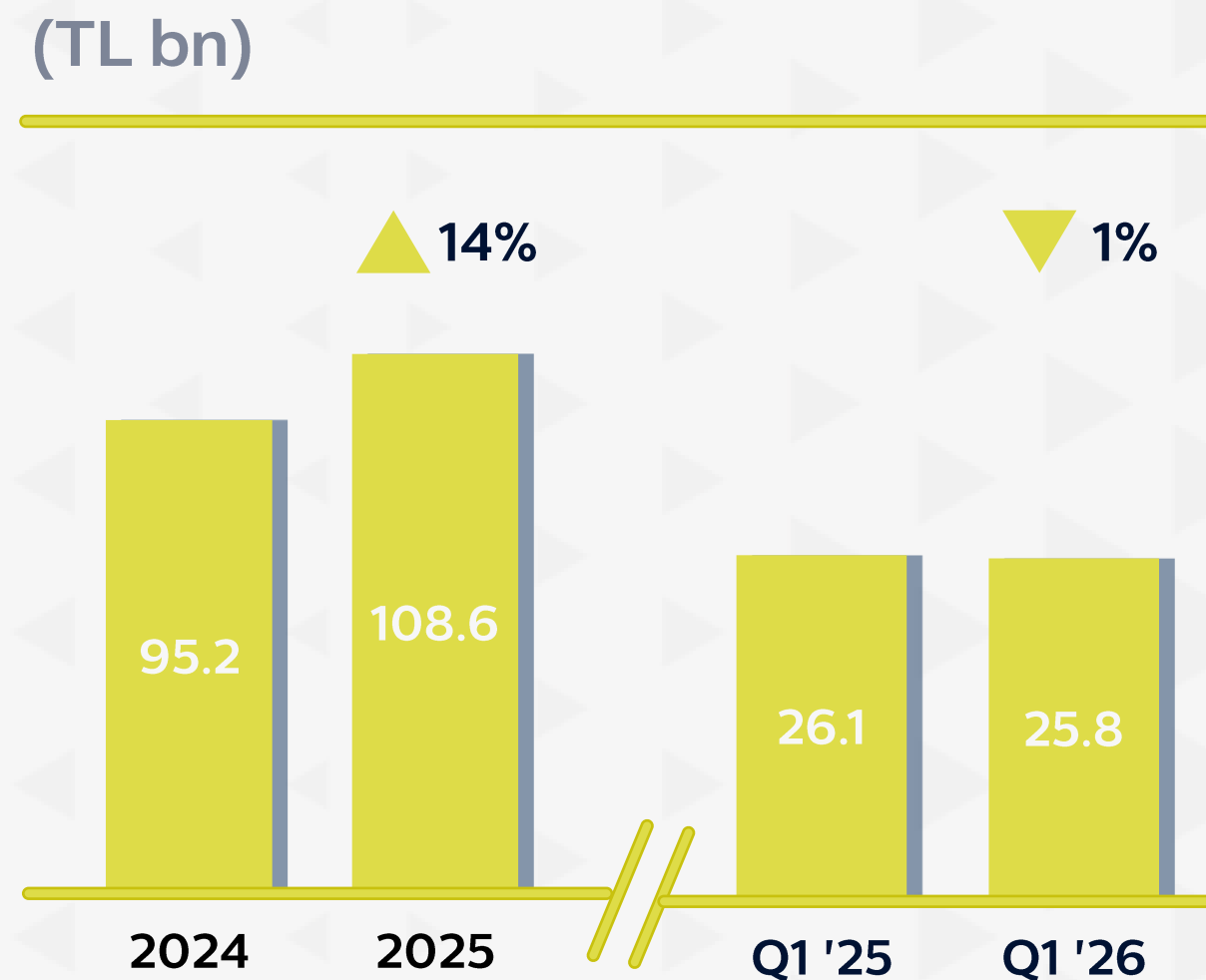
Q1 '26 Revenue Breakdown (% of Consolidated Revenue)



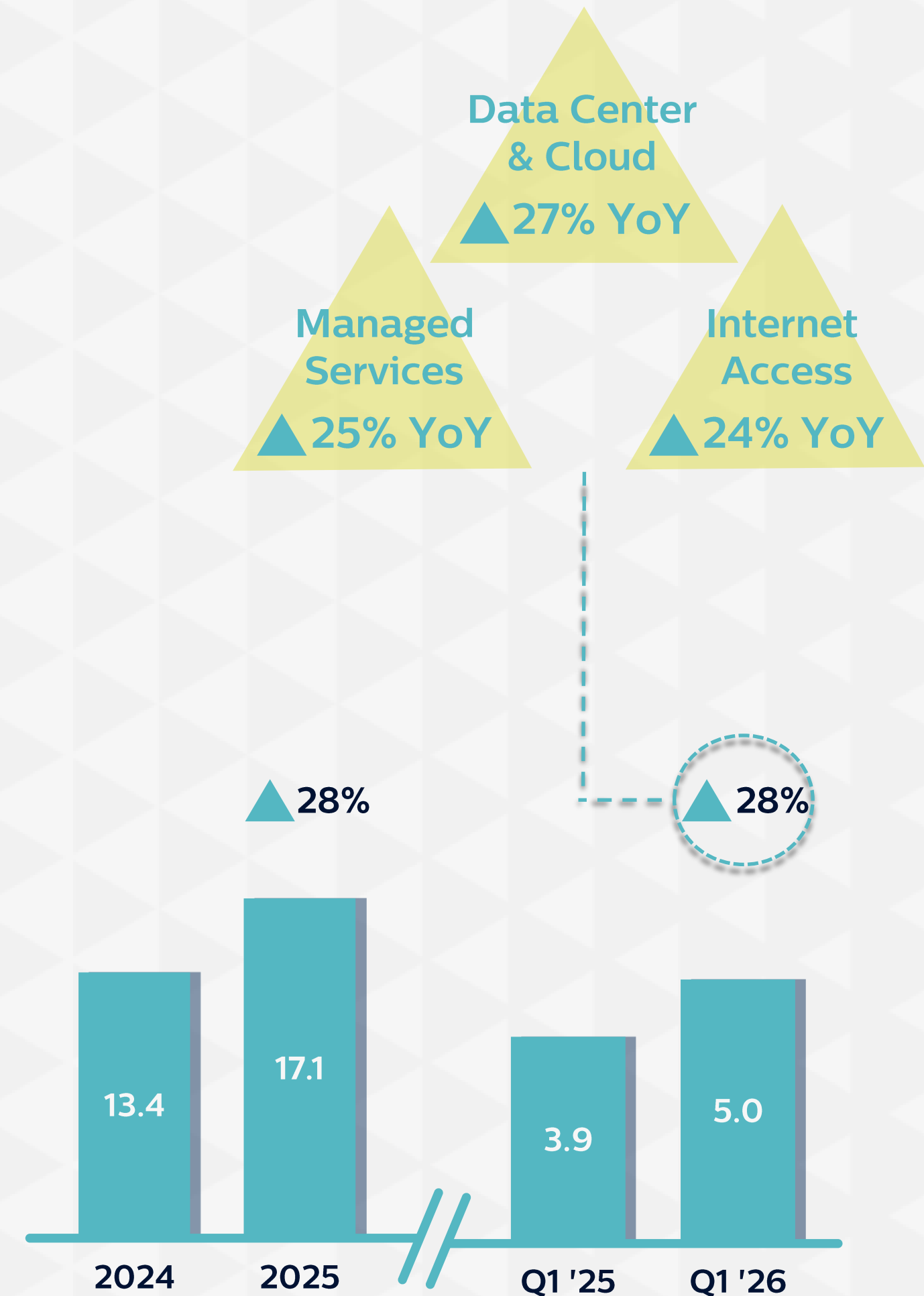
Fixed Broadband (TL bn)



Mobile (TL bn)



Corporate Data (TL bn)

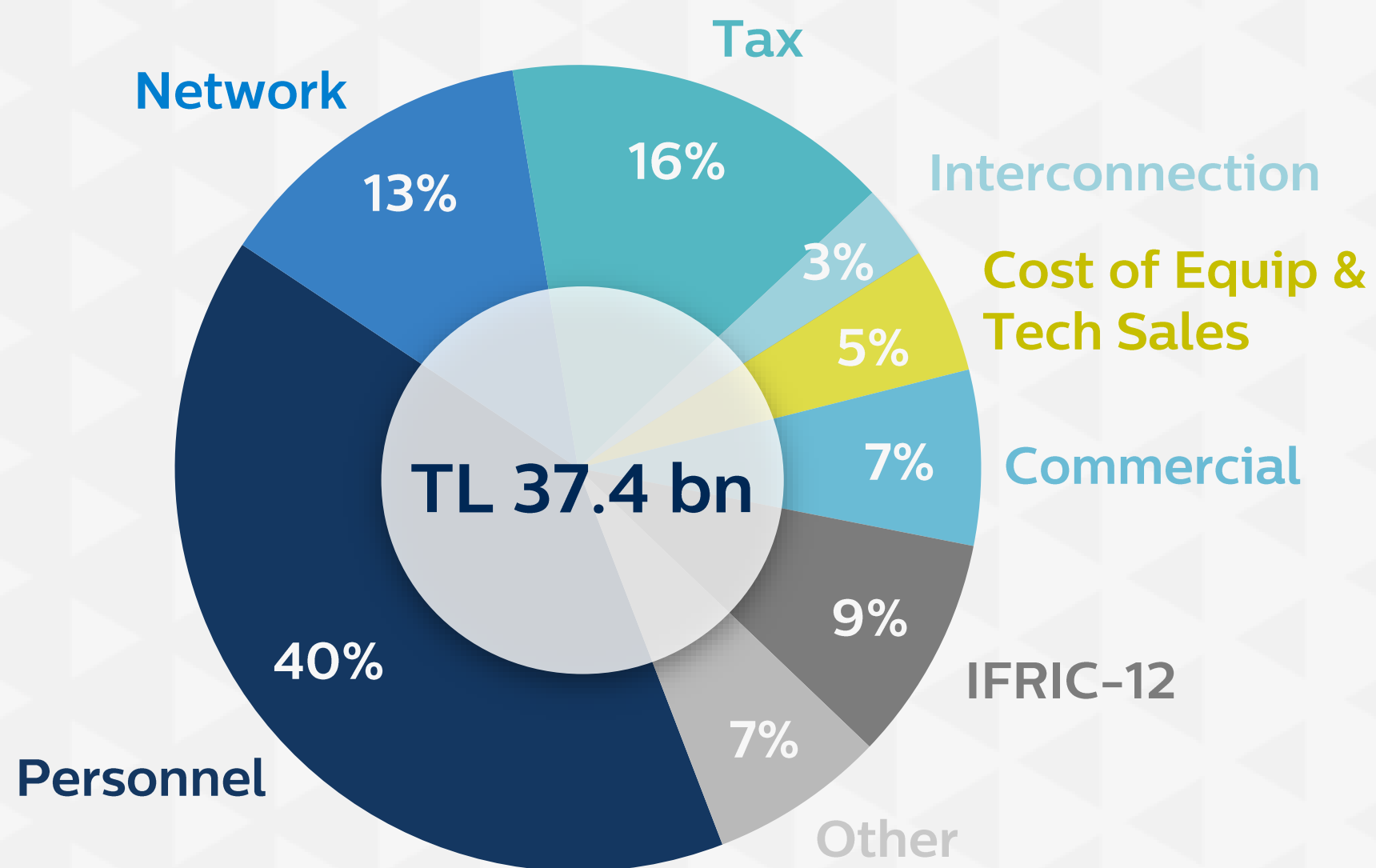


All figures presented at their values as of Q1 '26
Other includes ICT companies, device sales, domestic interconnection and other revenues

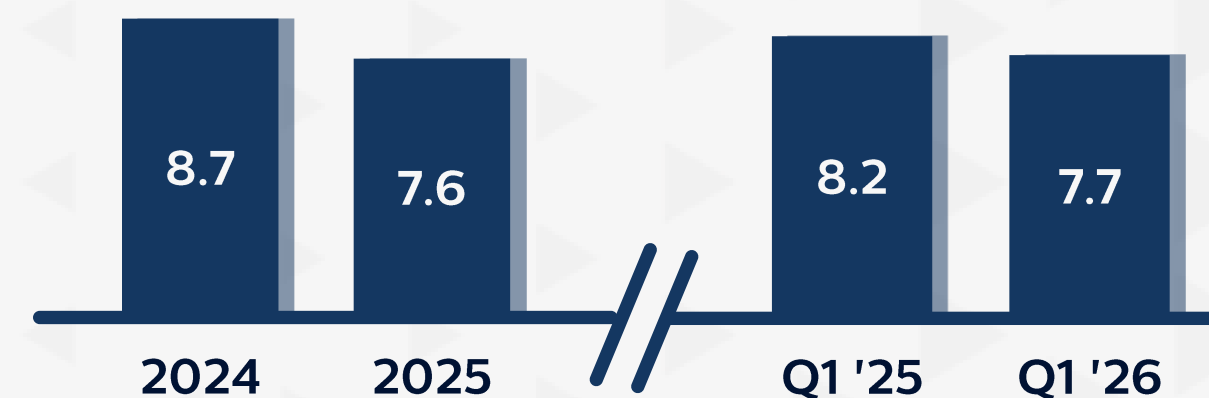
Focus on Efficiency



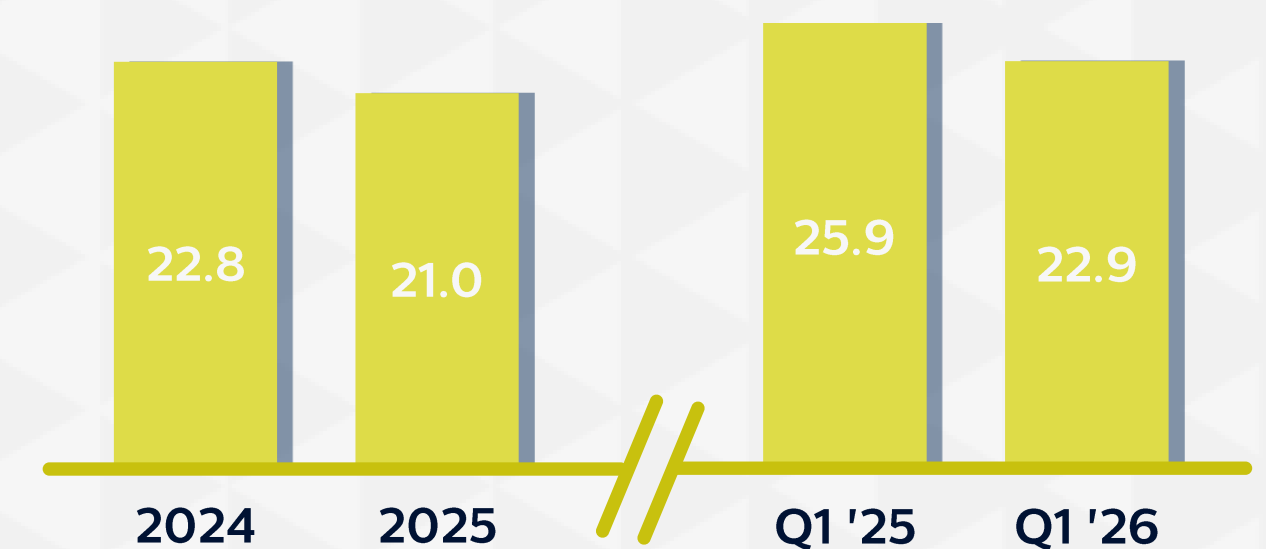
Q1 '26 Opex Breakdown (% of Consolidated Opex)



Network Expense to Sales (%)



Personnel Expense to Sales (%)



Provision for Doubtful Receivables to Sales (%)



Commercial Cost to Sales (%)



All figures presented at their values as of Q1 '26
Other includes bad debt, general & administrative, other direct cost and other costs

Financials

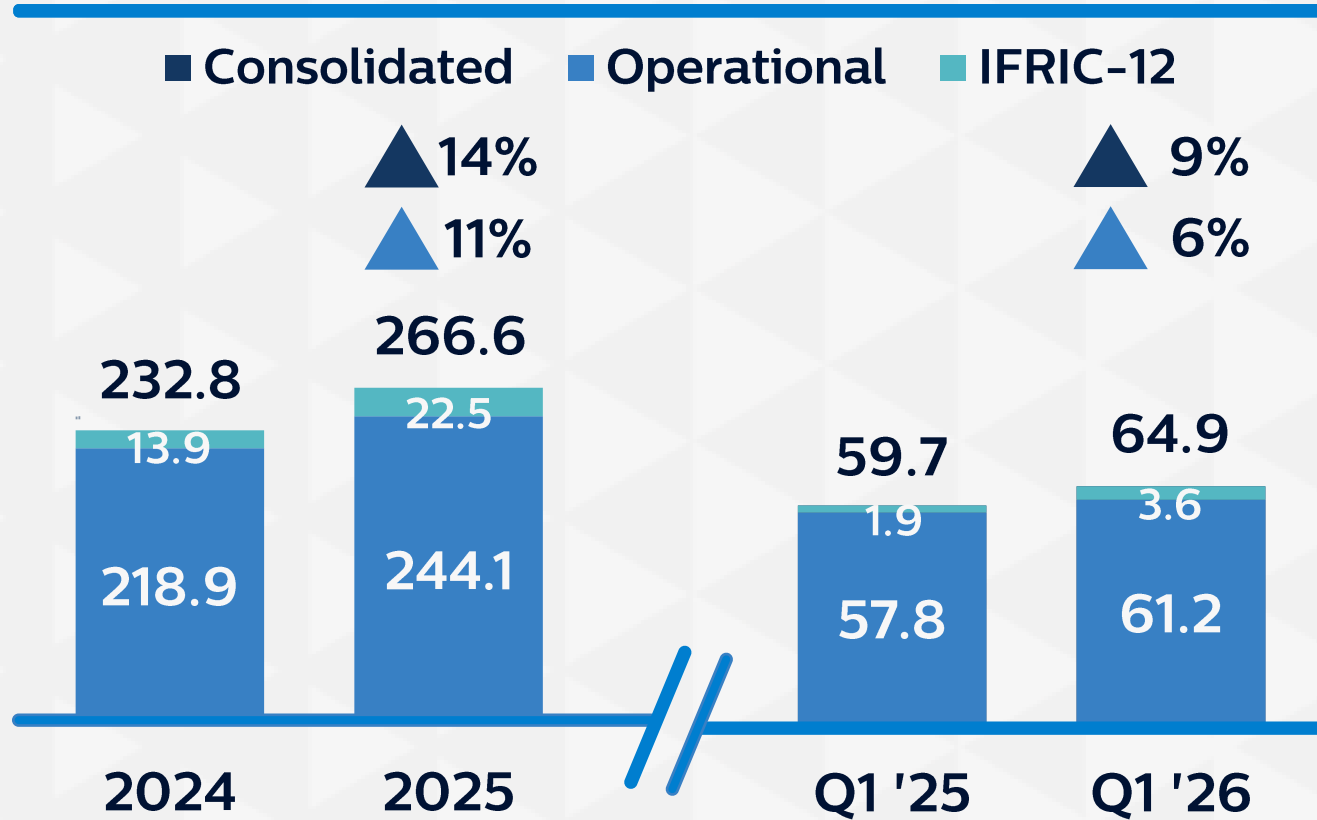


Summary Performance

Solid revenue & EBITDA performance supported by operational efficiency resulting in robust profitability

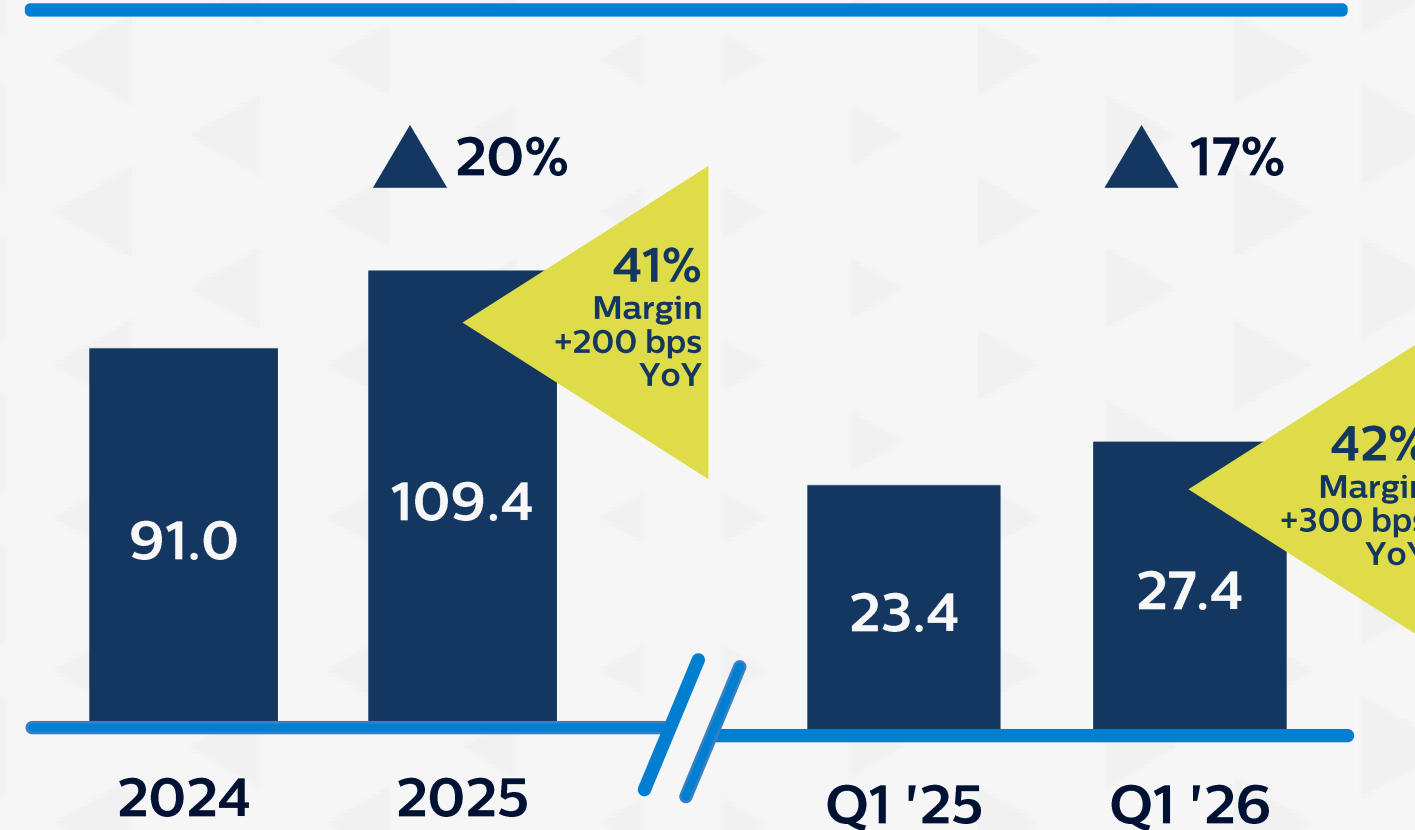
Revenue

(TL bn)



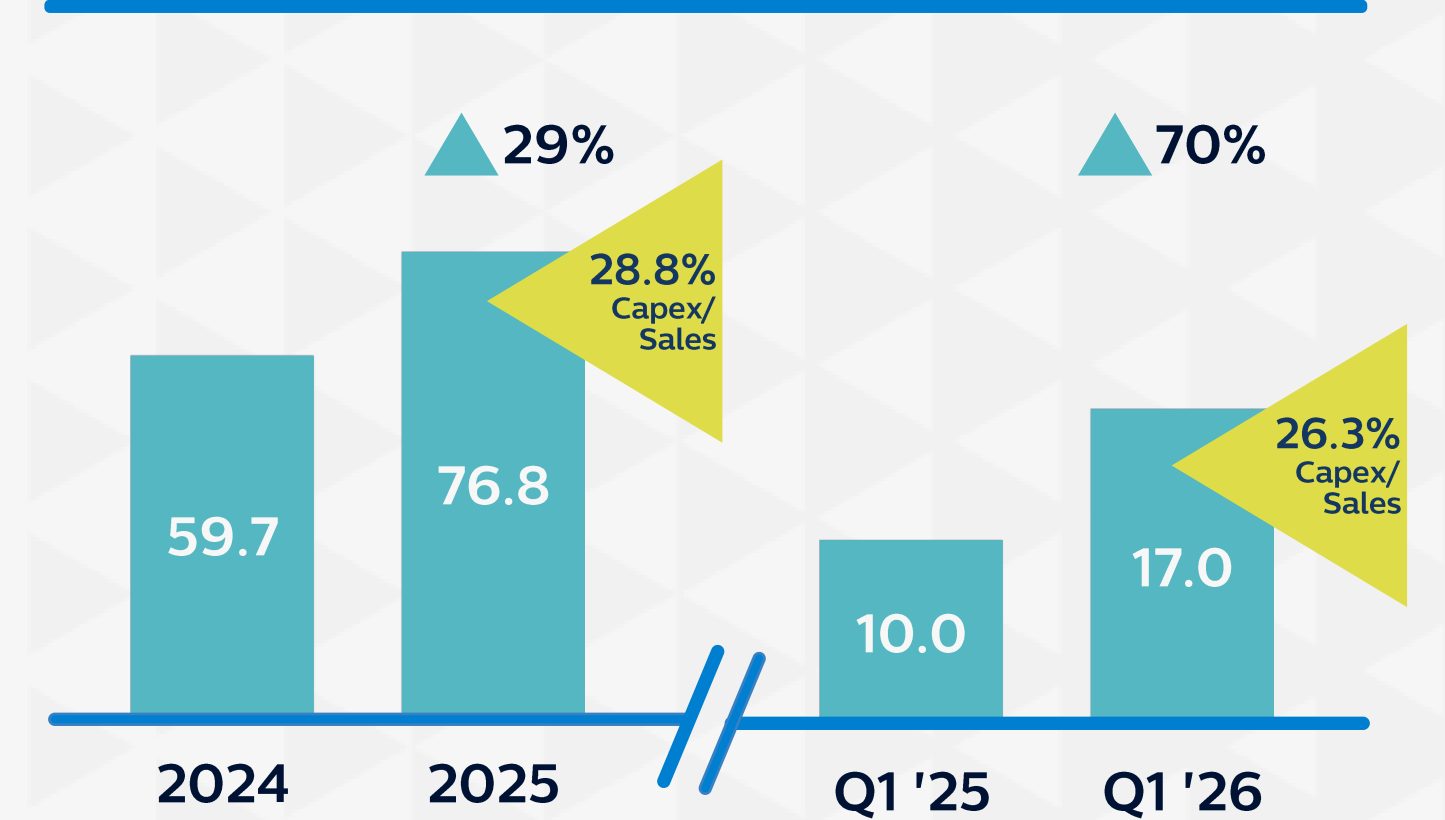
EBITDA

(TL bn)



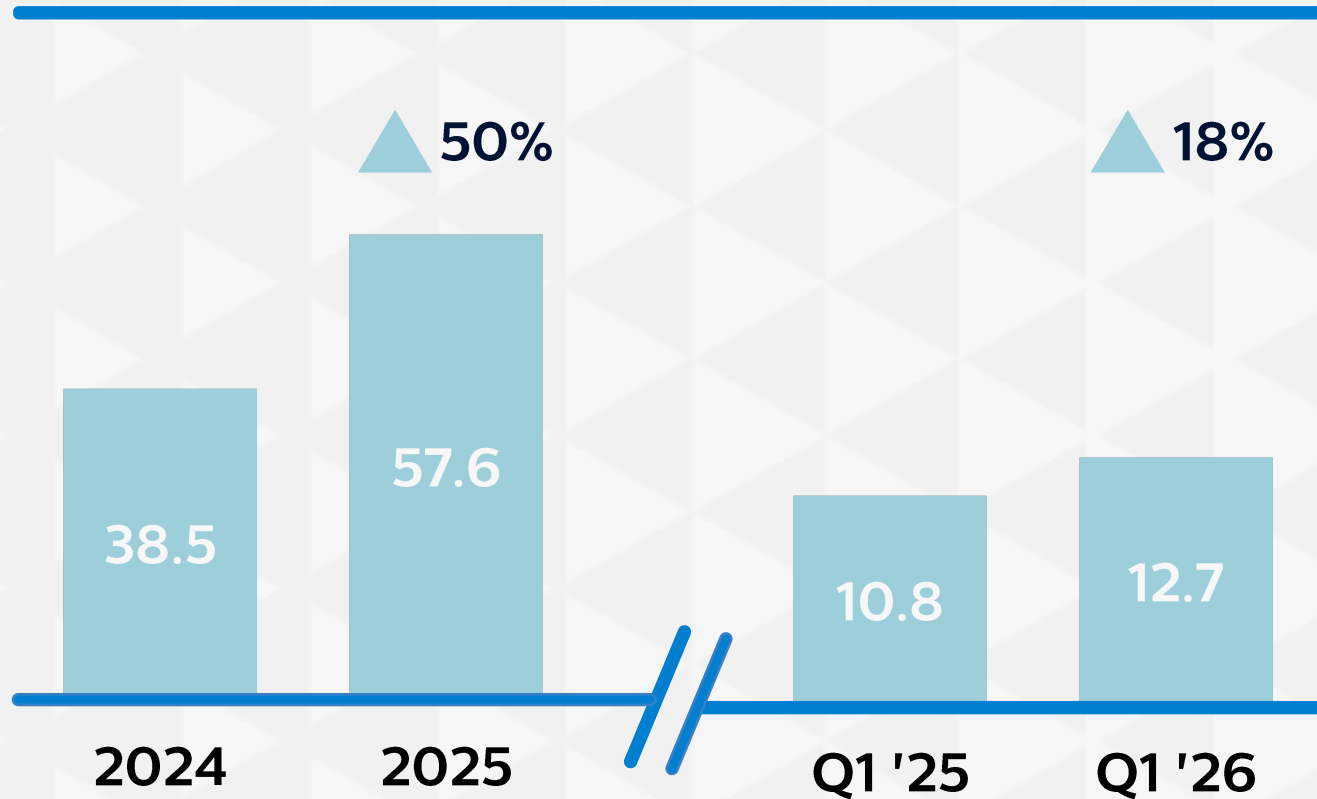
CAPEX

(TL bn)



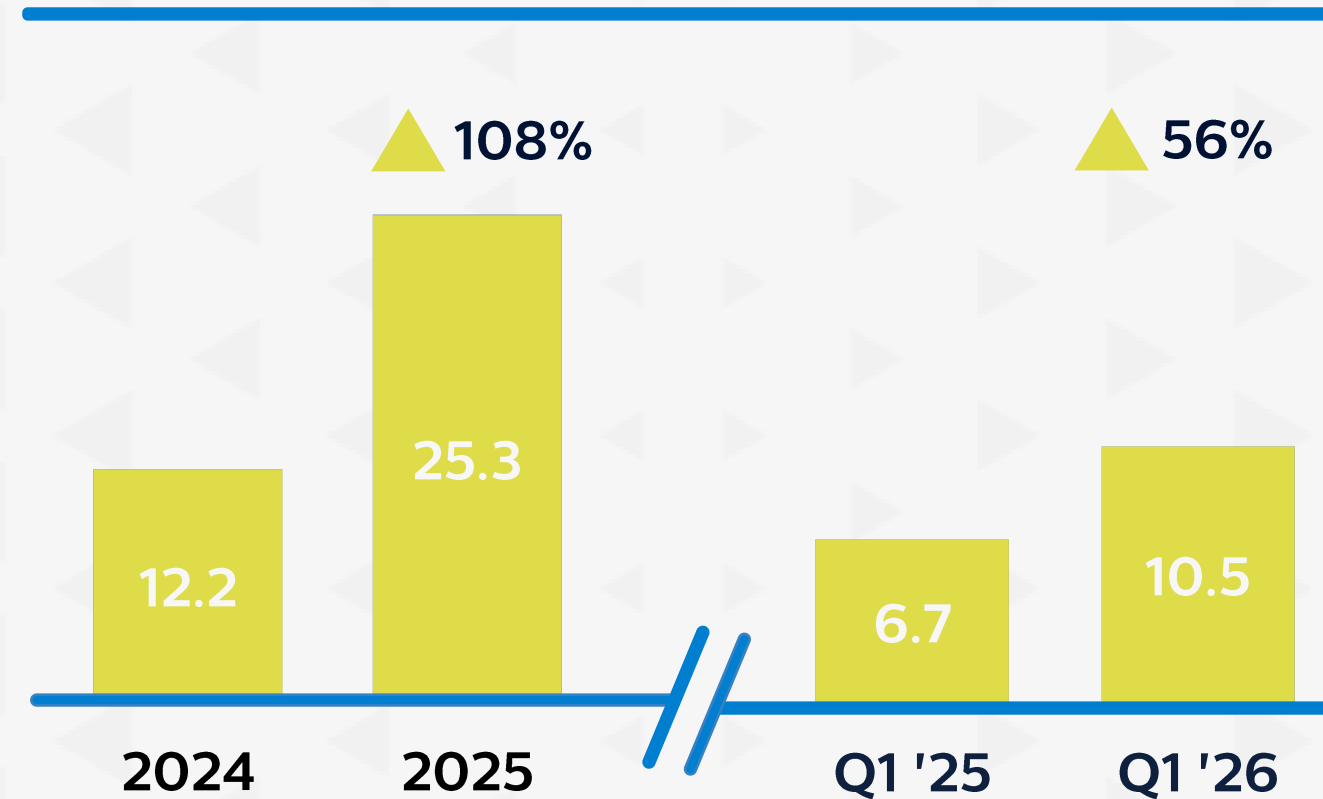
Operating Profit

(TL bn)



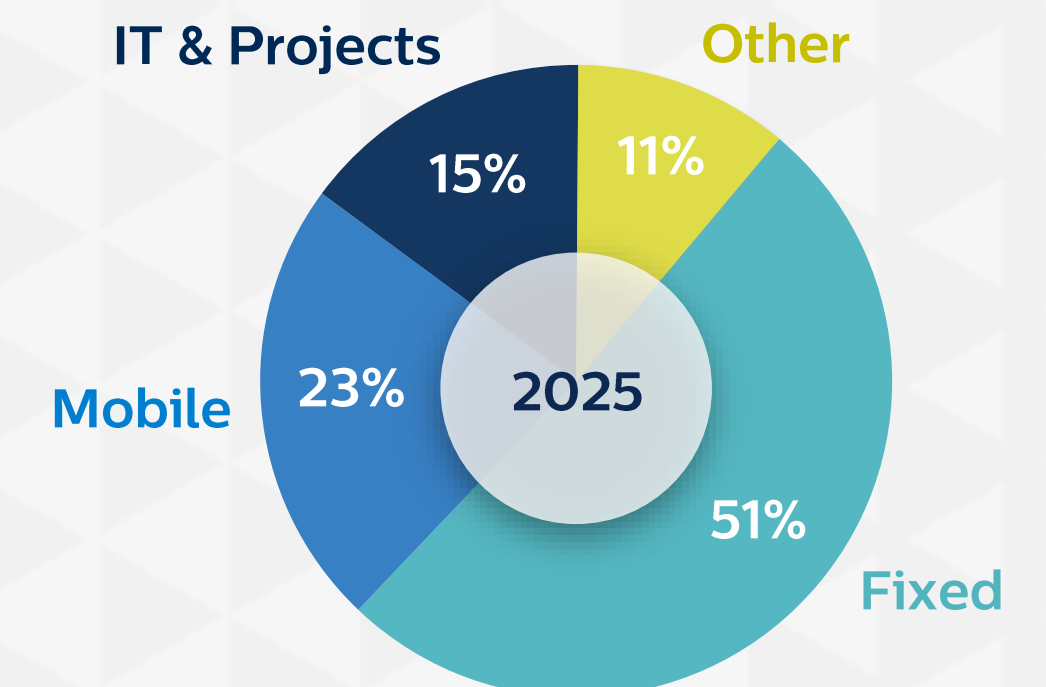
Net Income

(TL bn)



Capex Breakdown

(2025, %)



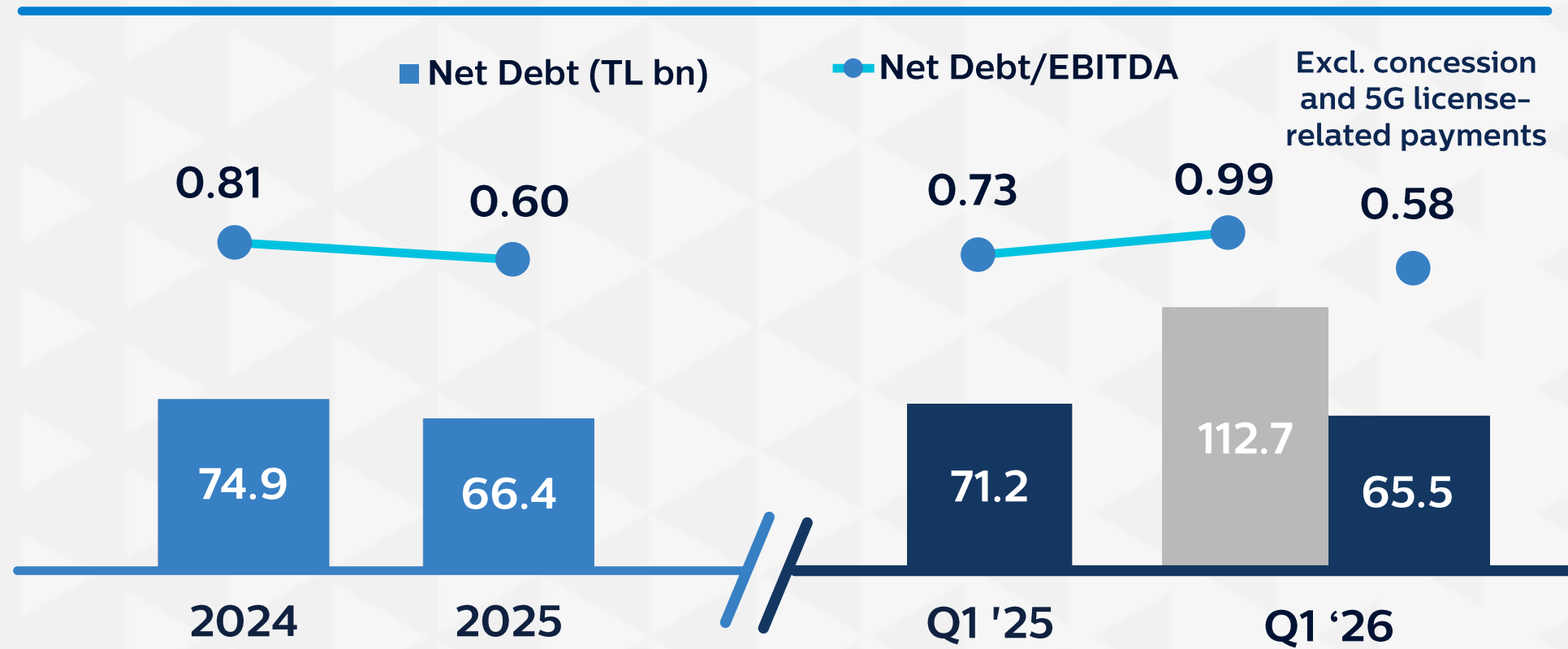
All figures presented at their values as of Q1 '26

Capex excludes concession, license fees and solar investments
Other capex includes capex for subsidiaries (excl TTI), new revenue streams, IFRS 15 capitalisation, etc.

Debt Profile

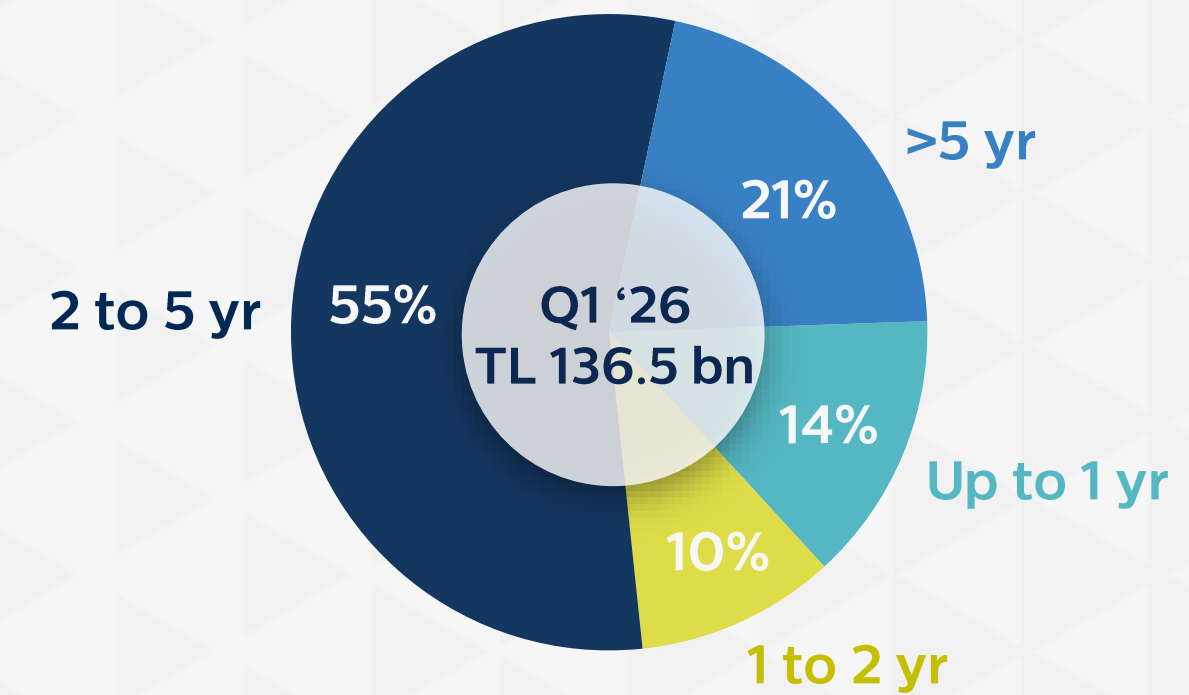
Strong balance sheet and debt maturity profile – managing concession and 5G related payments with long term financing

Net Debt



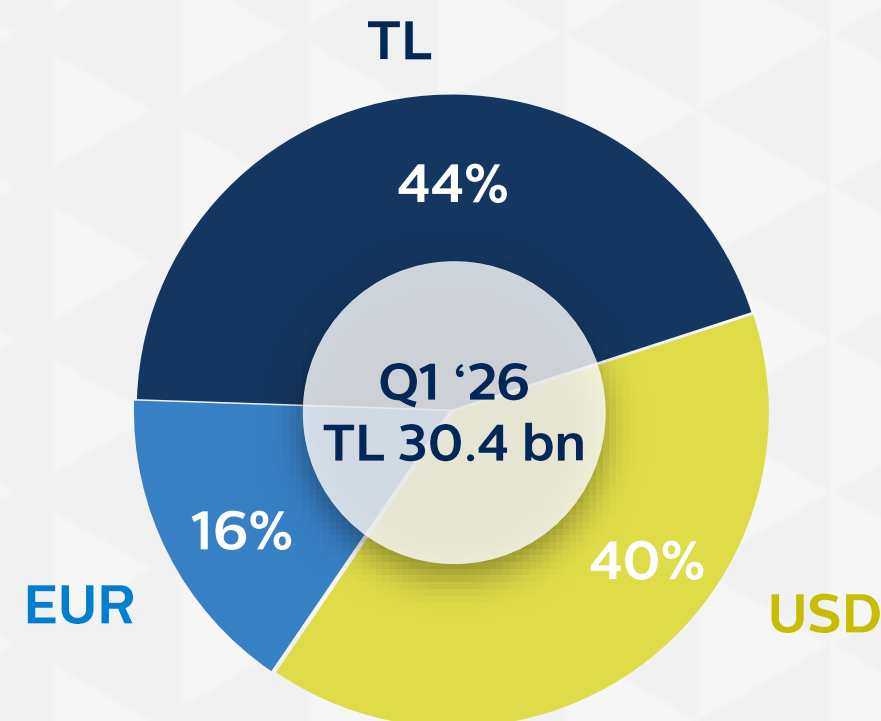
Net Debt calculation includes market valuation (MTM) of Foreign Currency TL money swap transactions. Net Debt/EBITDA calculation does not include extraordinary provisions in EBITDA calculation.

Maturity Profile

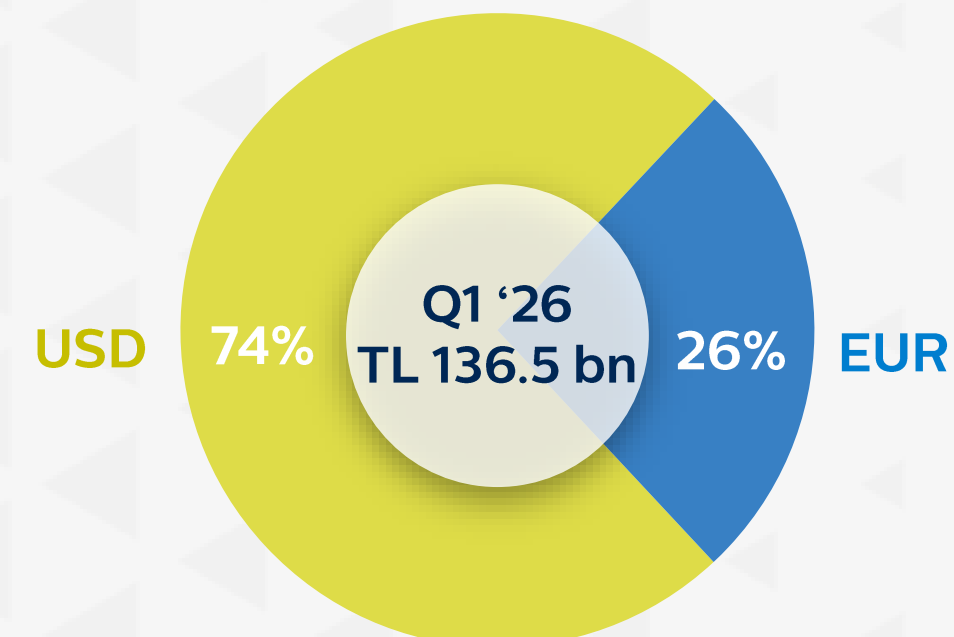


All loans are senior unsecured. 2 to 5 year debt includes 2029 maturity sustainable eurobond (USD 500 mn) and 2030 maturity sukuk (USD 600 mn). 5+ year debt includes 2032 maturity green eurobond (USD 600 mn).

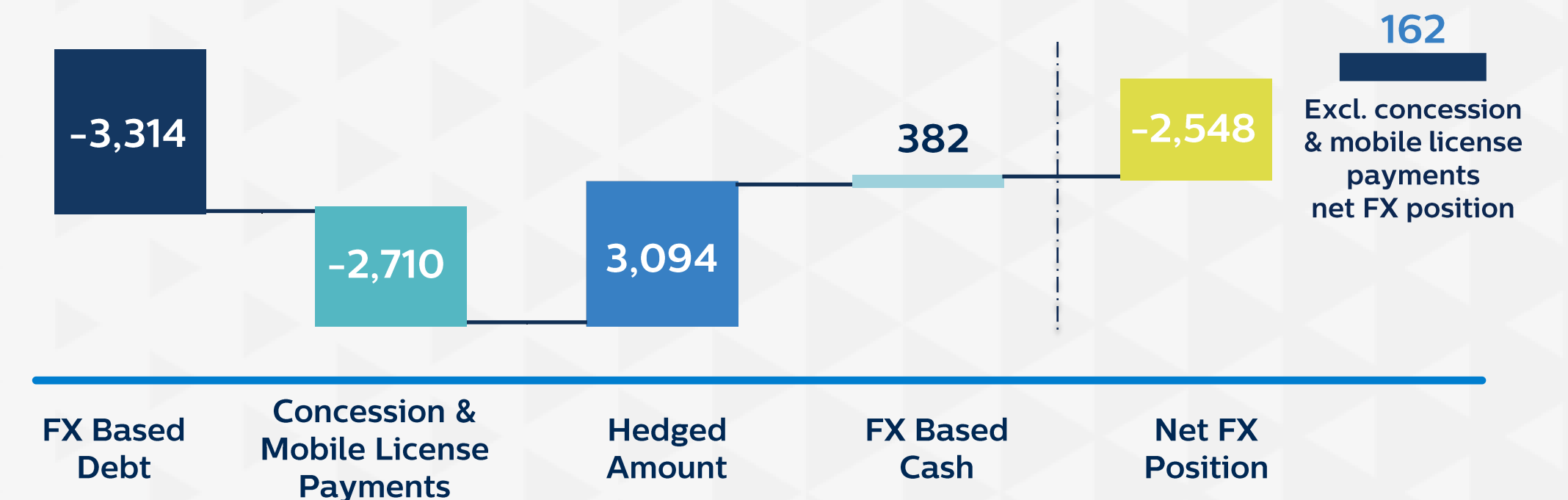
Cash – Currency Breakdown



Gross Debt – Currency Breakdown



Hedge – Composition of FX Position (USD mn)



FX Debt calculation includes FX financial debt (including FX lease obligations) and FX net trade payables. Hedged amount includes hedging of FX financial debt, hedging of FX net trade payables and net investment hedge.

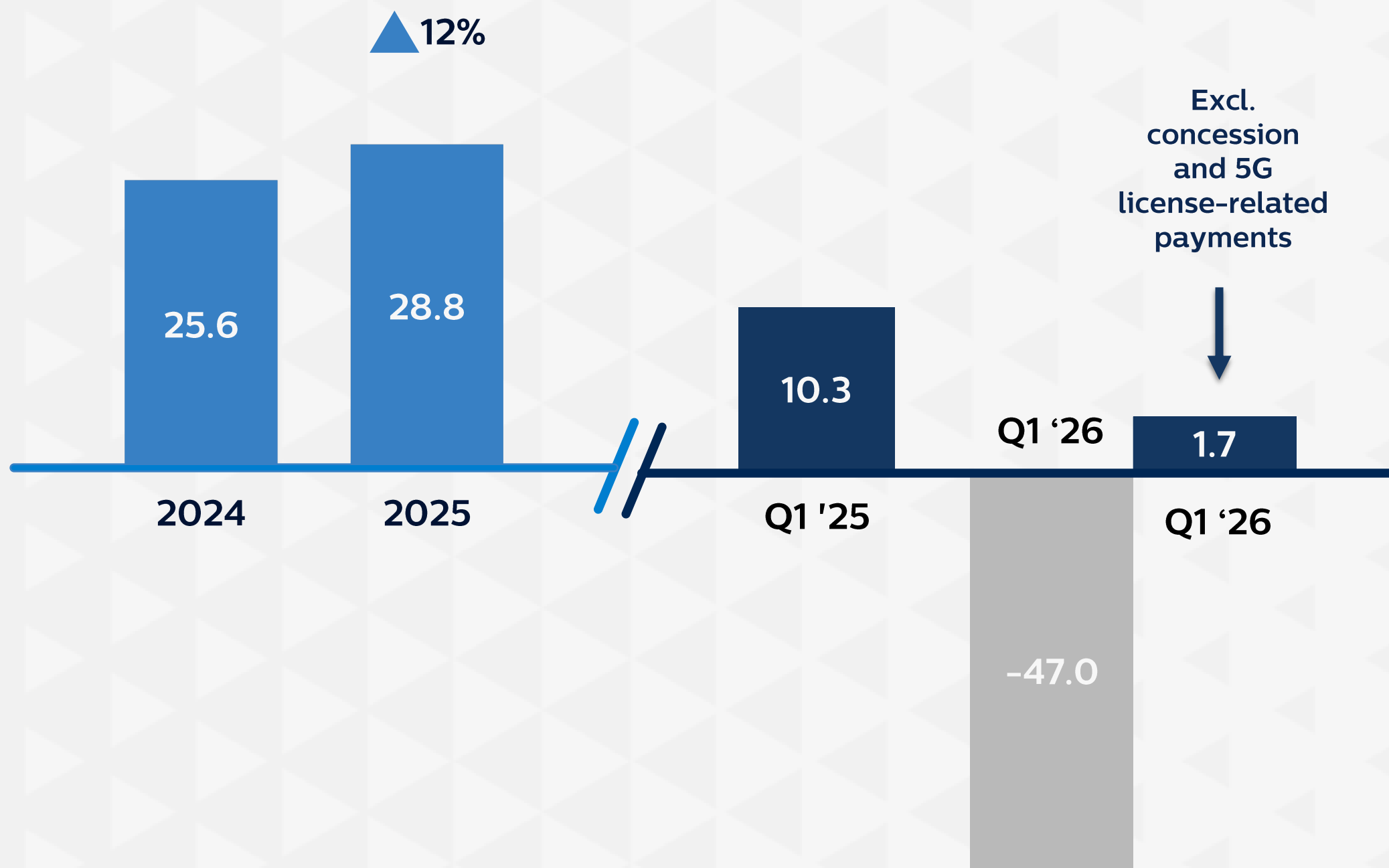
All figures presented at their values as of Q1 '26

Prudent Balance Sheet Management

Robust operational cash flow generation and financing capacity enabling 5G & concession payments

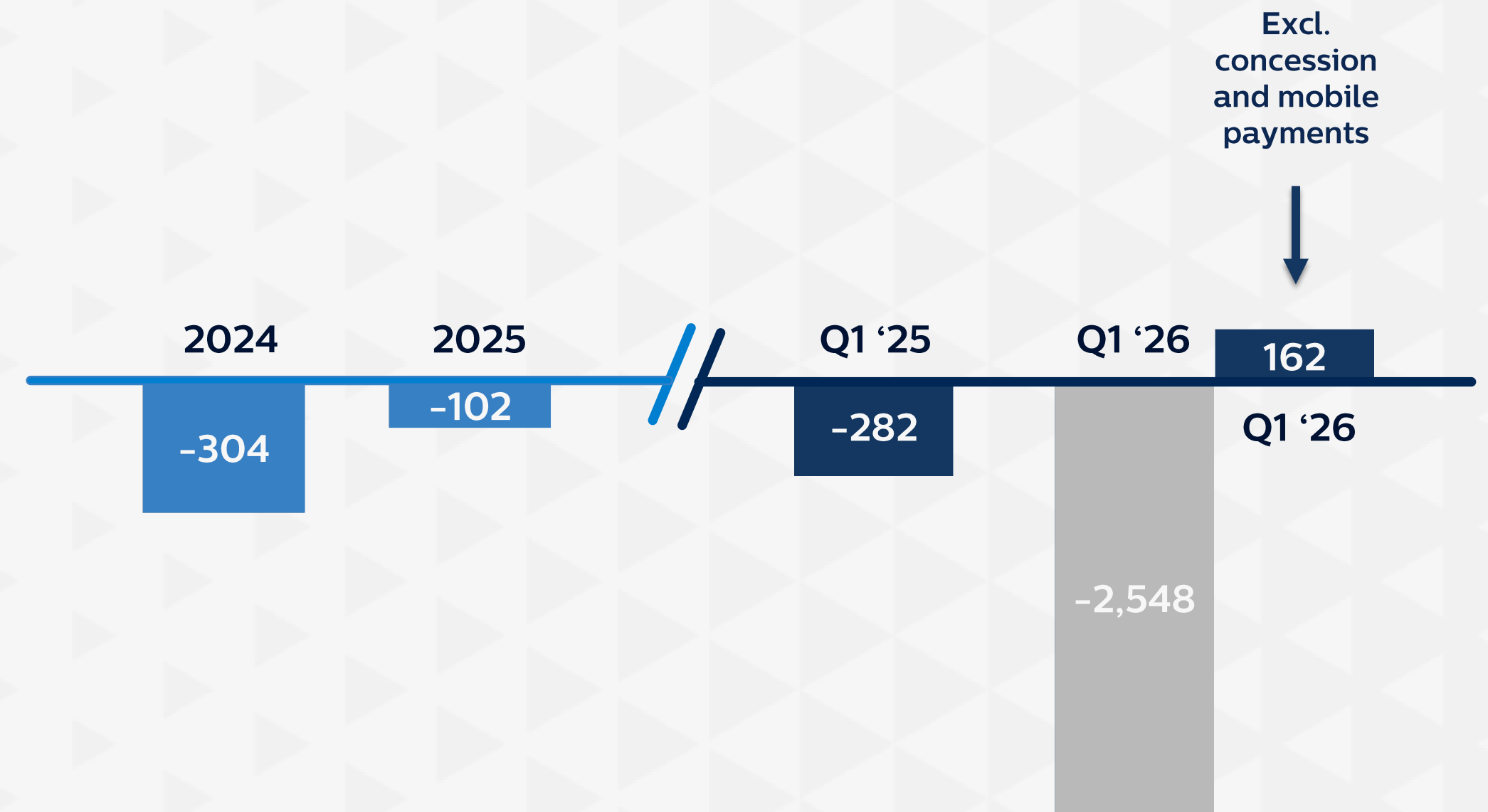
Cash Flow

(TL bn)



Net FX Exposure

(USD mn equivalent)



Free cash flow is defined as net cash provided by operating and investing activities, from operations.

Net FX exposure is calculated as total FX based debt plus concession & mobile license payments less total hedged amount, less total FX based cash.

All figures presented at their values as of Q1 '26

2026 Guidance

Q1'26 results are in line with our full year 2026 guidance

	Full Year 2026 Guidance	Q1'26 Actuals
Revenue Growth (exc. IFRIC 12)	8-9%	5.9% ✓
EBITDA Margin	41-42%	42.3% ✓
Adjusted CAPEX Intensity	33-34%	26.3% ✓

- Q1'26 consolidated revenue increased 8.7% YoY
- Revenue excluding IFRIC 12 increased 5.9% YoY
 - ▶ Full year guidance includes quarterly upward trend in revenue growth
- We maintain our guidance while remain cautious especially regarding inflation expectations
 - ▶ Current trends indicate inflation outlook is higher
 - ▶ Prudently monitoring regional geopolitical developments & macroeconomic outlook

2026 guidance represents approximate values.
IFRIC 12 adjustment is a non-operational revenue line booked in conjunction with upgrades to our fixed line infrastructure such as the upgrade from copper to fibre based network..
Adjusted CAPEX intensity excludes spending for the solar investments, concession extension and all license fees.

Corporate Credit Ratings

	Fitch	S&P Global
Long Term Local Currency IDR	BB	BB
Long Term Foreign Currency IDR	BB-	BB
Outlook	Stable	Stable
National Long Term Rating	AAA (tur)	
Last Update	27 April 2026	30 September 2025

Rating Drivers

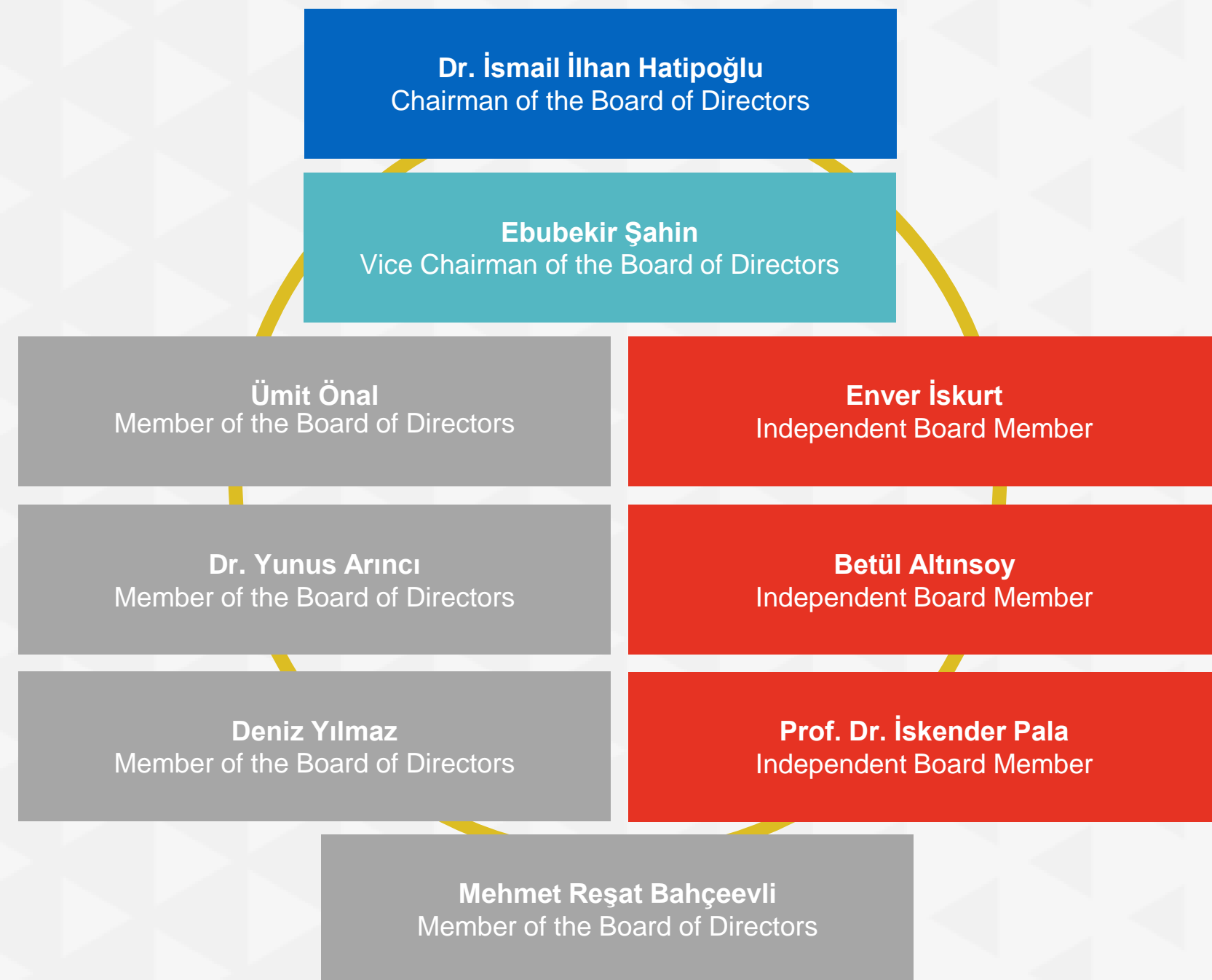
- ▶ Strong market position as the country's incumbent integrated telecoms operator
- ▶ Solid business model underpinned by a rational competitive environment and strong operational profitability
- ▶ Prudent financial policy and a well-managed balance sheet supported by active FX risk management (hedging)
- ▶ Low leverage providing financial flexibility to absorb: concession payments, 5G spectrum auction costs, and increasing capex
- ▶ Ongoing FX mismatch between TRY-denominated revenues and predominantly foreign currency debt, weighing on the credit profile
- ▶ Expectation of negative FOCF in 2025, improving to neutral to slightly positive from 2026-2027, due to concession payments and potential costs associated with the 5G spectrum auction



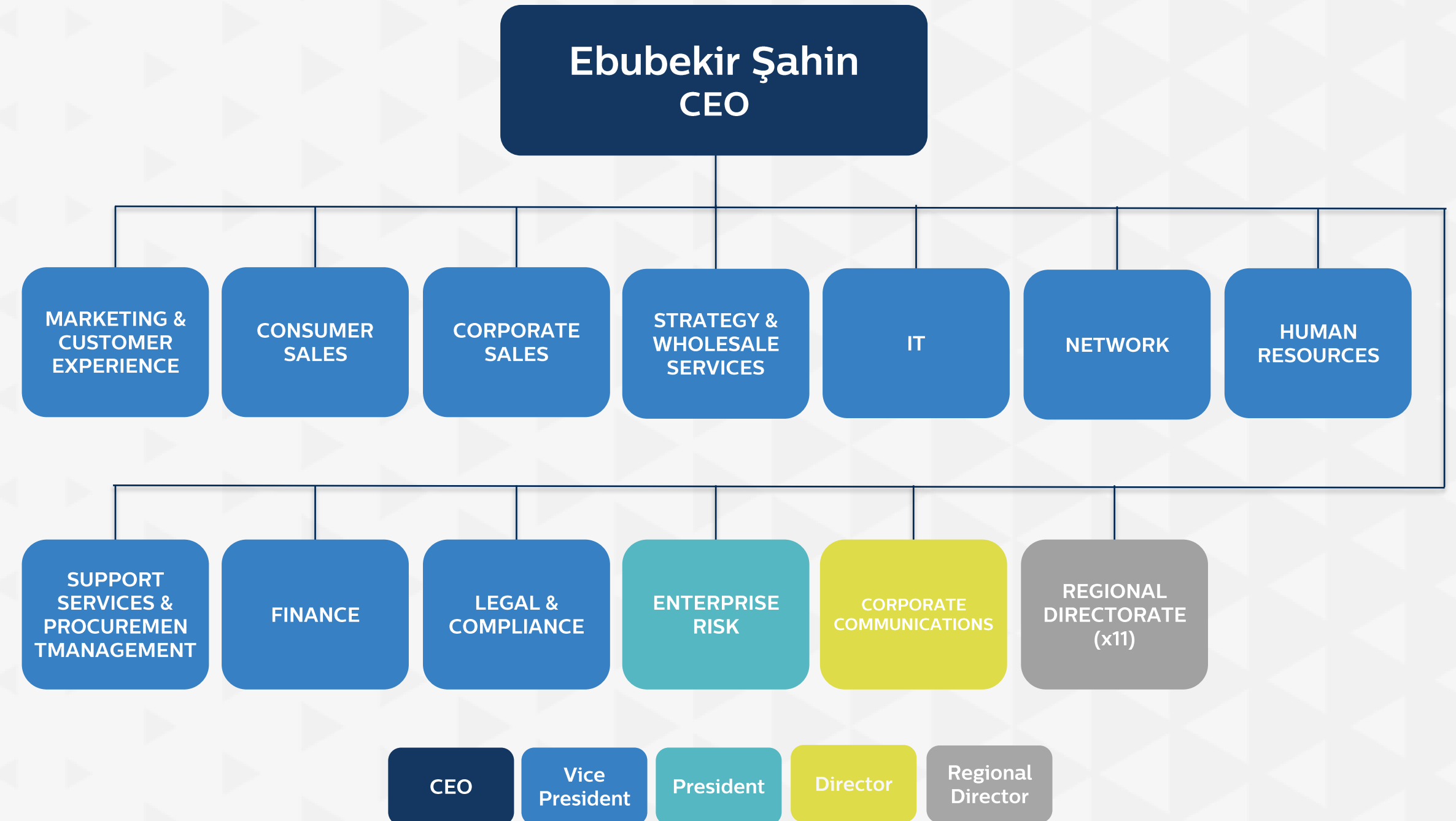
Sustainability

Robust Governance & Commitment to Sustainability Excellence

Governance: Board of Director Independence



Organisational Structure



9 Board Members, 3 of which are independent

Chairman and CEO positions are held by different individuals

Audit Committee comprising of Independent Board Members

Sustainability Committee reporting to the Board of Directors

Among companies with the highest score in the category of 'Stakeholders' and 'Public Disclosure & Transparency'

Sustainability Strategy

Focus on Customer

Customer-oriented approach in operations: continuous focus on enriching the customer experience

Focus on Trust

Doing business in a reliable, honest, legal and ethical manner

Contribution to Society

Offering accessible communication that drives sustainable economic growth and social development

Climate Change and Environment

Aware of the risks posed by global climate change, eager to deliver on environmental responsibilities

Value for Human

Applying the principle of 'Makes You Feel Valuable' to all human resources policies, systems and processes by putting employees at the centre

Our SDG Aligned Targets

- ▶ Türk Telekom makes continual progress on its near term Scope 1 and Scope 2 emission reduction target and works on setting a Scope 3 emission reduction target. The Company is currently undertaking the necessary steps to complete the SBTi validation process.
- ▶ Net Zero by 2050
- ▶ Supporting our employees' development
- ▶ Access to quality network, digital inclusion and equal opportunities
- ▶ Encouraging women's participation in workforce

Our Contribution to the UN Sustainable Development Goals



Sustainability Governance



Effective Sustainability Management

- ▶ **Sustainability Policy** sets forth our sustainability vision and focus areas
- ▶ **The Sustainability Committee** comprising of 11 executive members reports to the BoD
- ▶ **2026 Sustainability Program** created to set and review the near term action plan and effectively monitor progress
- ▶ Clear **Sustainability Goals** are important KPIs in employee remuneration



Environmental Sustainability

- ▶ **Products and services with low carbon emissions** reduce greenhouse gas emissions
- ▶ **ISO 14001** Environmental Management System



Our Employees (2025)

- ▶ **40%** female, **60%** male Türk Telekom Group employee distribution
- ▶ Freedom of association and right to collective bargaining
- ▶ Average hours of training per employee: **28.6**
- ▶ Education satisfaction: **4.7** out of 5



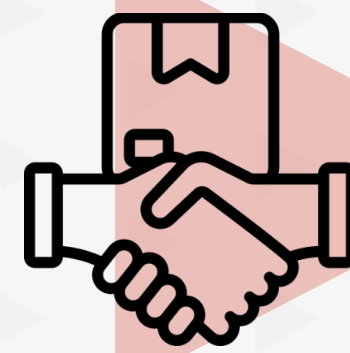
Occupational Health and Safety

- ▶ Occupational Health and Safety Boards
- ▶ **ISO 45001** Occupational Health and Safety Management System Certificate
- ▶ Occupational Health and Safety legislation training for over **12 thousand** employees
- ▶ **ISO 9001** Quality Management System



Data Security

- ▶ **Information Security Policy**
- ▶ Awareness and training on Personal Data Protection Law
- ▶ Employee training on data security and privacy
- ▶ Information Security Certifications: **ISO 27001 & PCI-DSS Certificates**
- ▶ Complying with GDPR



Our Suppliers

- ▶ **Procurement Policy**
- ▶ Supplier Performance Evaluation Process
- ▶ Safe working conditions
- ▶ Compliance with Human Rights Policy

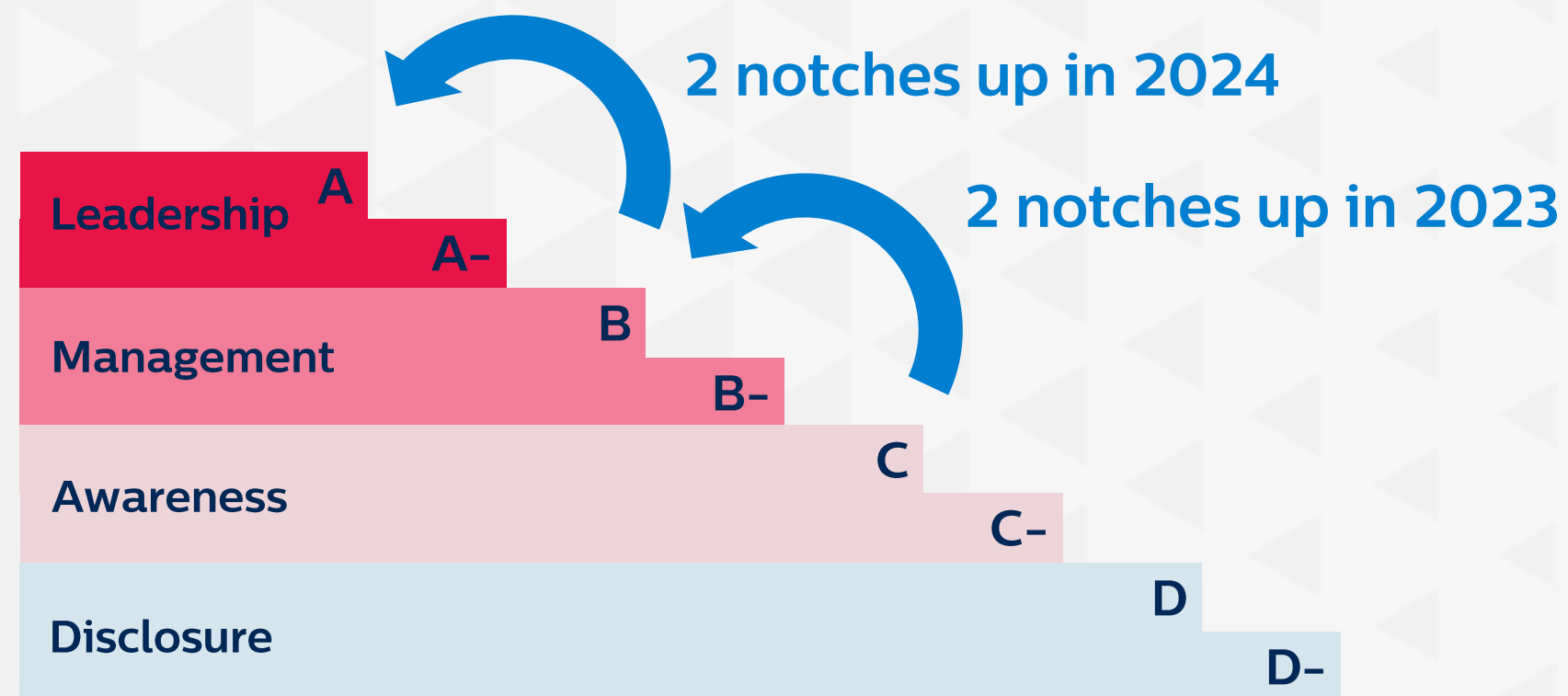
Concrete Progress on Environmental Agenda



In 2025, we were **once again included in the A List of the Carbon Disclosure Project (CDP) Climate Change Program**, demonstrating our continued strong performance in tackling climate change. In the CDP Water Security Program, in which we were evaluated for the first time, our A- score further recognized our high performance in managing our environmental impacts.

- ▶ We improved **data quality** at the same time we **expanded** the scope of calculations for our carbon inventory **particularly in Scope 3 emissions**.
- ▶ **Further-integrated sustainability management into the Group's corporate structure**, ensuring a more cohesive and strategic approach

Maintaining our leadership in 2025



We take important steps together with our stakeholders to control our environmental impact and lower our carbon footprint. Focusing on:

- ▶ **Energy Efficiency**
- ▶ **Renewable Energy**
- ▶ **Clean Transportation**
- ▶ **Pollution Prevention and Control**



Türk Telekom published its first Allocation & Impact Report and intends to issue a **second bond under its Sustainable Finance Framework** marking its strong commitment to sustainable finance as an integral part of a broader sustainability agenda.



We are smoothly progressing on our roadmap to get the near term targets approved by the SBTi.

Scope 3 emissions include purchased goods & services, capital goods, business travel, employee commuting, end of life treatment of sold products, franchise, use of sold products, investments

Türk Telekom's' Greenhouse Gas Emissions (metric tonnes CO ₂ e)	2020 (Base Year)	2021	2022	2023	2024	Annual Change	Change Compared to Base Year
Scope 1 + Scope 2 (Location(based))	644.068	685.479	659.316	651.854	676.227	4%	5%
Scope 1 + Scope 2 (Market(based))	644.068	652.554	529.010	502.594	455.227	-9%	-29%
Scope 3	1.389.870	1.380.157	1.459.885	1.467.085	1.259.379	-14%	-9%
Total (Location(based))	2.033.938	2.065.636	2.119.201	2.118.938	1.935.606	-9%	-5%
Total (Market(based))	2.033.938	2.032.711	1.988.894	1.969.678	1.714.606	-13%	-16%

Investing in a Sustainable Future



Renewable Energy

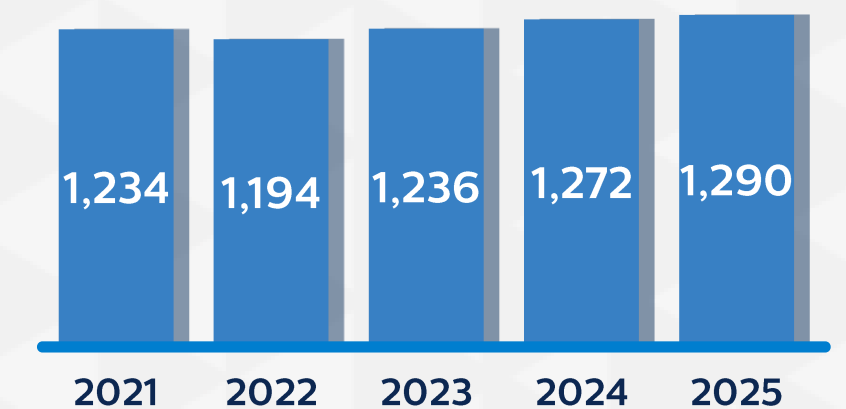
- Total installed solar power of **6.9 MW as of 2025**
- The first phase of the **405.8 MWe installation capacity (96 MWe)**, Sivas Zara Solar Power Plant, was commissioned at the end of 2025



Energy Efficiency

- **Smart Energy Management Platform**
- Selecting and deploying more energy-efficient telecommunication network equipment, **Gigabit Passive Optical Network (GPON) investments, 5G Investments**
- Ambition to bring down the **PUE** of existing data centres to **below 1.4**, and new data centers to **below 1.2**.
- Improvement of the average **power usage effectiveness (PUE) of data centres to 1.54** as of 2025
- **More efficient cooling solutions** (e.g. CRAC, free cooling, etc.)
- **I-REC (Renewable Energy Certificate) and ISO50001 Energy Management System Certificate** for our data centres
- **Energy efficiency installations** including heating, ventilation, air conditioning units, refrigeration, lighting and electrical equipment. **A total saving of 47 GWh** in 2025

■ Türk Telekom Group Purchased Electricity (GWh/Year)



Clean Transportation

- **Electric vehicles with zero direct emissions**
- **Electric transportation infrastructure**



Pollution Prevention and Control

- Reducing rapid consumption of natural resources with **waste management**
- Leaving a livable environment for future generations with the **Zero Waste** project
- **8 tonnes of domestic waste** were collected in 2025
- **Recovery and reutilisation of refrigerant gases** during repair and maintenance and from decommissioned AC equipment
- Switching of refrigerant gases to lower GWP refrigerant gases



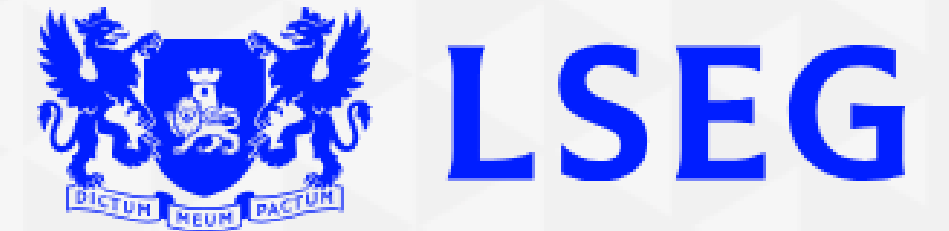
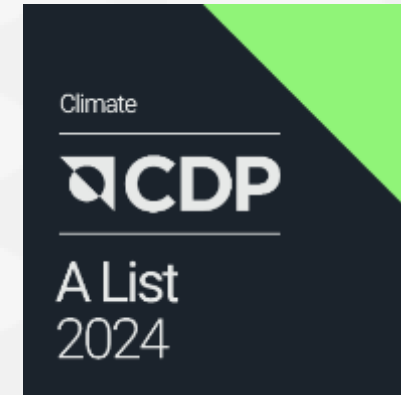
8 tonnes of domestic waste include Türk Telekom, TT Mobil and TTNET. Includes both hazardous and non-hazardous waste amounts. The verification process for 2025 has not yet been completed. Example of switching of refrigerant gases to lower GWP refrigerant gases: AC using R-32 GWP:675, Chiller using R-1234ze GWP: 7, CRAC using R-410A GWP: 1,890)

Transparent Reporting

- ▶ In our 2024 Integrated Report we presented our value creation model and carried out stakeholder and materiality analyses in line with the GRI's principles. Work on our 2025 reporting is currently ongoing.
- ▶ Comprehensive carbon inventory reporting that covers Scope 1, Scope 2, and Scope 3 (all categories) at Türk Telekom Group level.
- ▶ Actively participating in platforms/indices measuring sustainability performance.



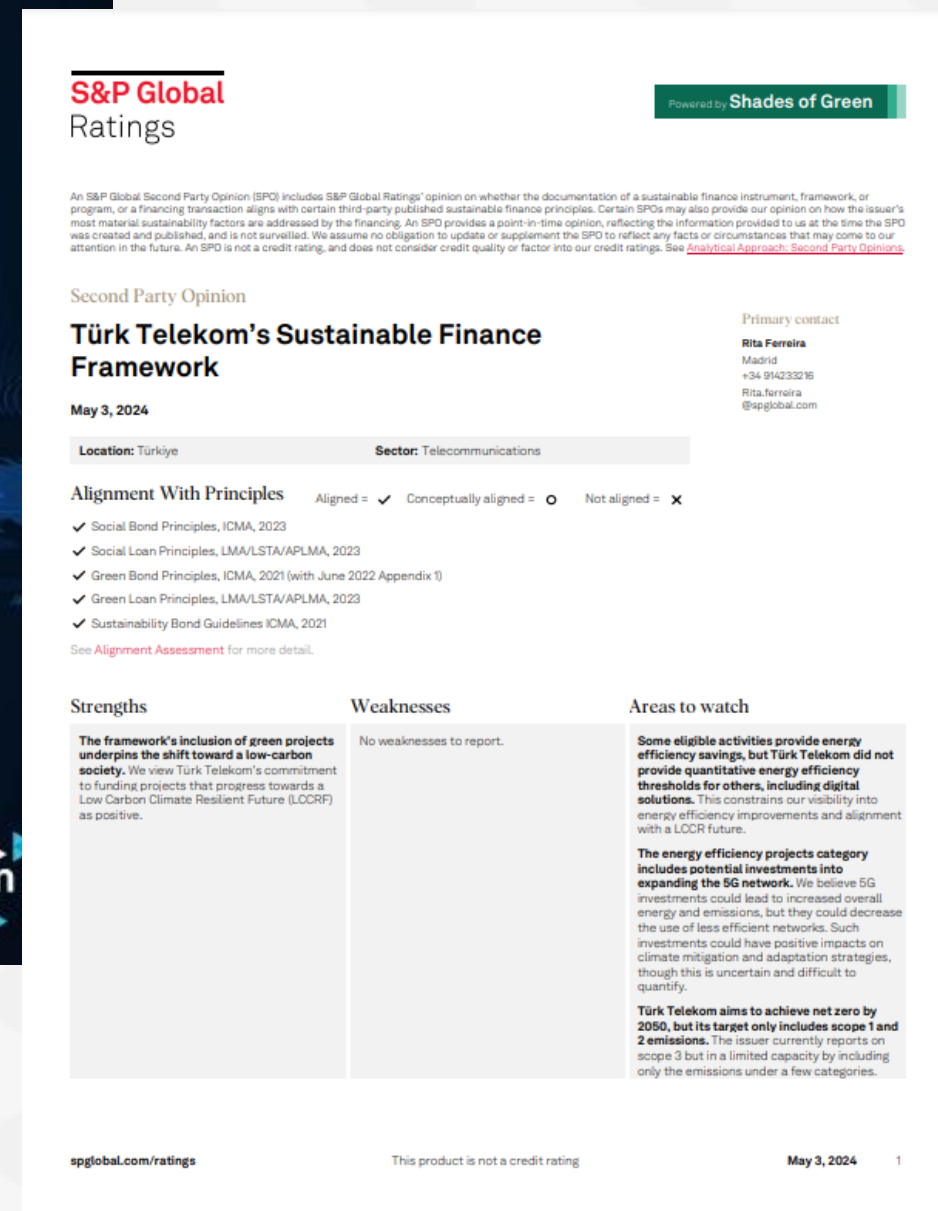
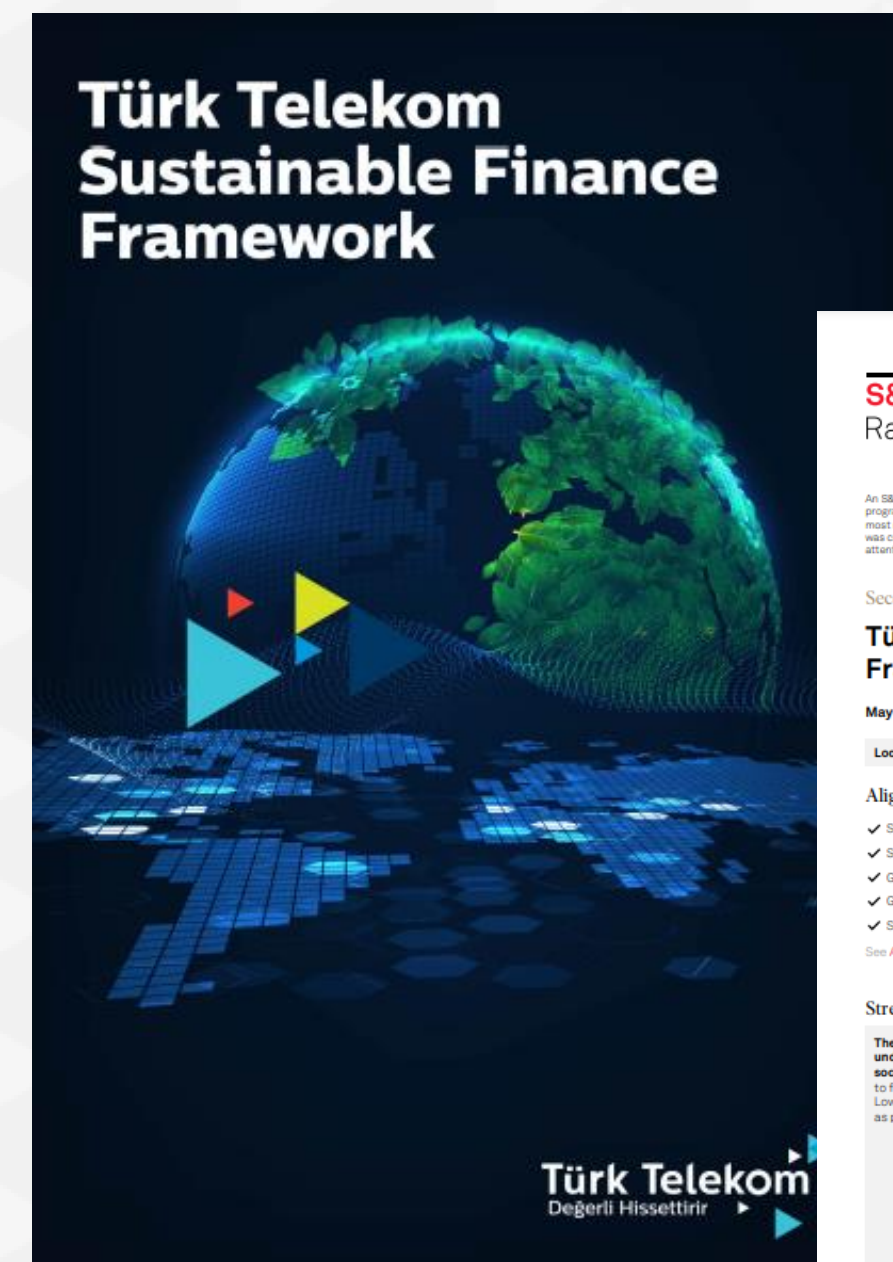
Sustainability Organisations & Indices that We Are Included In



Türk Telekom's Sustainable Finance Framework

Türk Telekom established a Sustainable Finance Framework and obtained a Second Party Opinion from S&P Global Ratings in May 2024

Framework aligned with ICMA Green Bond Principles, Social Bond Principles and Sustainability Bond Guidelines & LMA Green Loan Principles and Social Loan Principles



Use of Proceeds

Eligible categories include Renewable Energy, Energy Efficiency, Clean Transportation, Pollution Prevention and Control and Access to Essential Services (Digital Inclusion and Education)

Process for Project Evaluation and Selection

Sustainable Finance Working Group carries out the Project Evaluation and Selection processes in line with the criteria outlined in the Framework

Management of Proceeds

Net proceeds deposited as part of the general Treasury account and earmarked for allocation in a Sustainable Financing Register. Allocation on best-efforts basis within 24 months of issuance

Reporting

Annual reporting, made available on Türk Telekom's website, on Allocation and Impact metrics until full allocation of any net proceeds

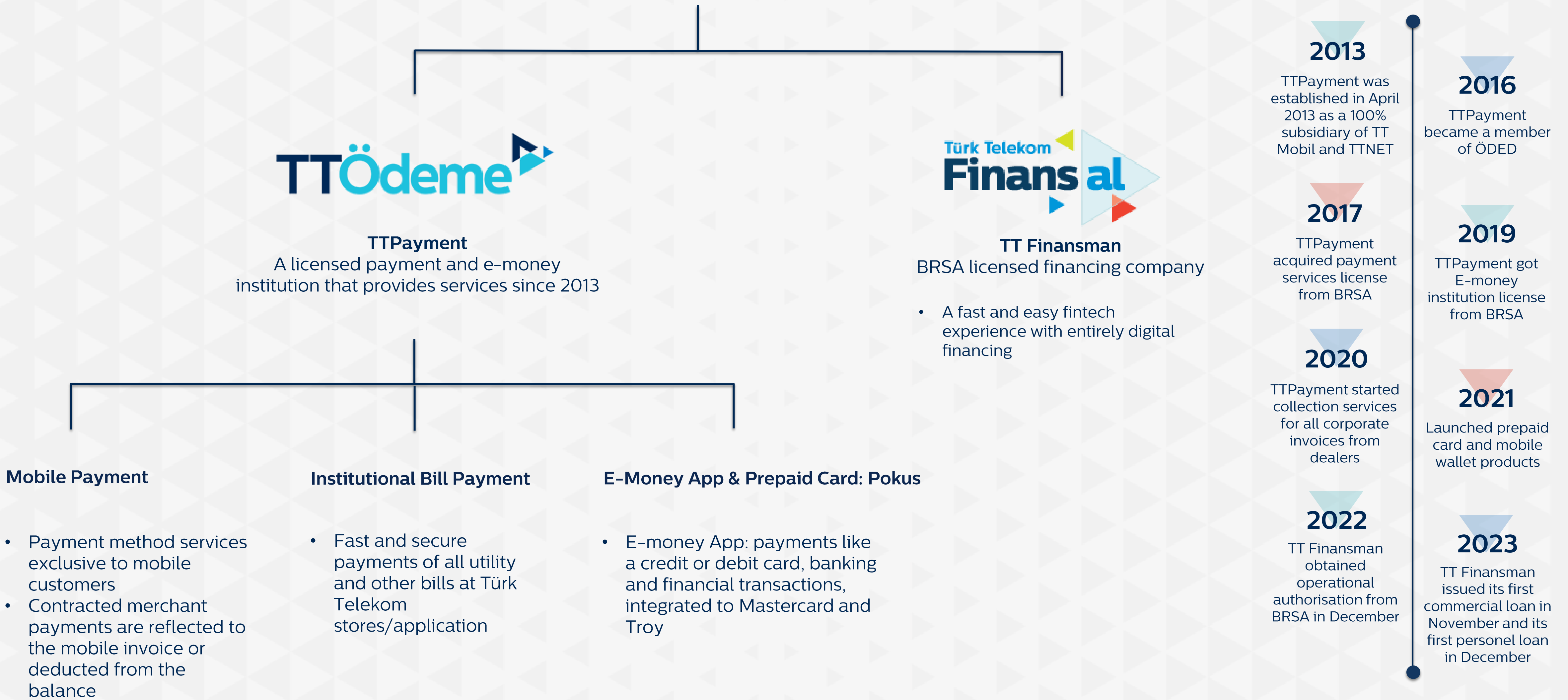
External Review

Second Party Opinion obtained from S&P Global Ratings, confirming alignment with ICMA GBP, SBP and SBG and LMA GLP and SLP. Post-issuance verification of tracking and allocation of funds



Investing in
Future

Türk Telekom Group Financial Technologies



Türk Telekom Ödeme ve Elektronik Para Hizmetleri A.Ş. (TTÖHAŞ), TTÖdeme in short, stands for TTPayment in English

ÖDED: Payment and Electronic Money Association

Mobile Payment and E-Money App & Prepaid Card

Mobile Payment



Easy payment at contracted member stores



Prepaid: deduct from the TL balance,
Postpaid: collect through the invoice



No subscription is required

Mobile Payment in Numbers, 2025

Revenue up **93%**

Number of transactions up **40%**

Transaction volume up **84%**

Increases in mobile payment revenue and transaction volume are w/o TAS29

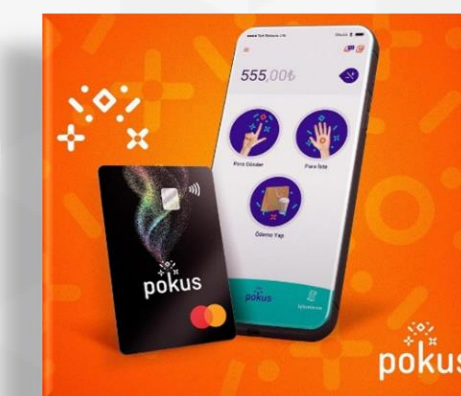
E-Money App & Prepaid Card: Pokus

Contactless Shopping



Express Account

No Fees



24/7 Money Transfer

Advantageous Campaigns



Bill Payment



Money Loading

Features

- **E-money application** of TTPayment + **prepaid card**
- Load-spend; no overdraft, **no subscription fee**
- Secure payment service under **TROY** and **Mastercard**
- **Easy, fast financial services** without cumbersome procedures
- App-linked, **contactless card**
- **Operator independent**

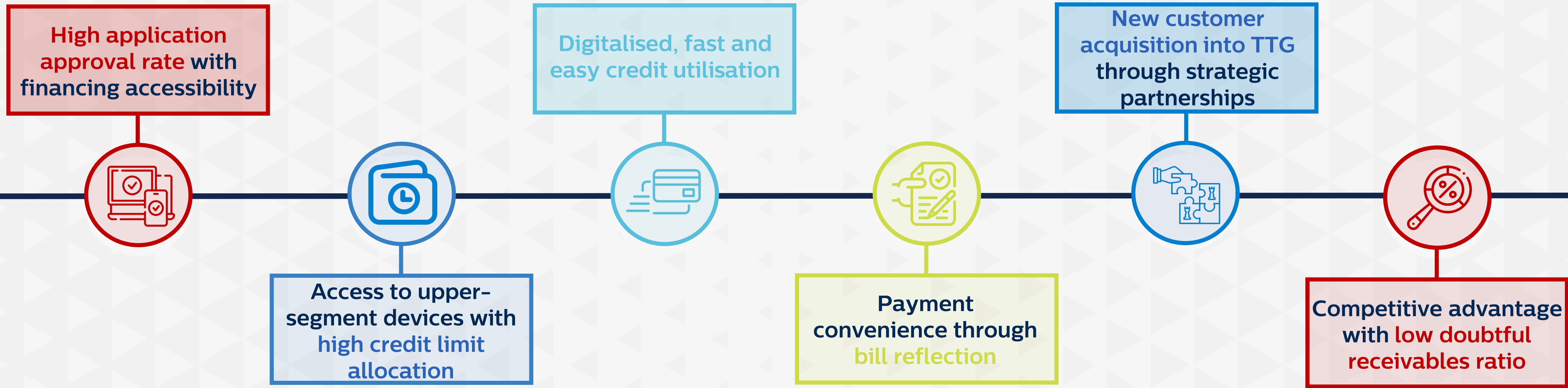
Strategy

- Simple/digital customer experience
- Access to financial services through one application

Synergy

- Türk Telekom technology and ecosystem
- Vast subscriber base and efficient sales channels
- Campaigns, cross-selling, retention

TT Finansman: Financing Company



Roadmap

Strategy

- ▶ Financing solutions aligned with evolving purchasing and payment behaviors driven by digitalisation
- ▶ Fast and seamless fintech experience
- ▶ Differentiated customer experience with a strong focus on innovation and continuous improvement
- ▶ Integration of analytics and AI tools into business processes

Synergy

- ▶ Access to a broad customer base through Türk Telekom's extensive dealer network
- ▶ Accelerated growth driven by multi-product offerings to TT Mobil and TTNET subscribers
- ▶ Omnichannel management enabled by e-store integration

New Technologies

Türk Telekom actively participates in...



Collaborations in next-G tech

vRAN

Software-Based and Sliceable Virtualised Radio Access Network

Product partnership and revenue sharing with Juniper



5G Time Synchronisation

Cooperation with Net Insight: Product partnership, revenue sharing and discounted supply advantage

A new work item has been initiated within the ITU-T, officially launching the standardisation process



Innovative Products

- Türk Telekom is the first operator in the world to develop/use GPS/GNSS independent technology and SEBA (Software Defined Fiber Broadband Access System) technology
- SEBA solution surpassed 770K homepass in Türk Telekom network
- The first sale of SEBA was in Europe market

Future Technologies

Türk Telekom's Future Network Vision

- ▶ 6G
- ▶ Artificial Intelligence
- ▶ NTN (Non-Terrestrial Networks)
- ▶ Quantum
- ▶ Digital Twin

Seamless connectivity everywhere

- ▶ NTN (Satellite-integrated 5G/6G) + Satellite Integrated Network

Fully independent national timing & positioning

- ▶ National GNSS Independent Synchronisation

Self-managing, self-healing network

- ▶ AI-Based Autonomous Network + Zero-Touch Operation

Dedicated virtual networks for every industry

- ▶ E2E Network Slicing + 5G Network API & Open Gateway

Green & sustainable infrastructure

- ▶ Renewable Energy Infrastructure + Minimum Carbon Emission

Digital Channels

Continuous expansion of digital services for **best-in-class customer experience**

Wide range of services on the Türk Telekom Application: invoice payments, TL uploads, recontracting, upselling and application for new subscriptions

One login: accessing all Türk Telekom products; mobile, broadband, fixed voice, TV with single login



23 mn

Unique users in Q1 '26

In Q1 '23 14% In Q1 '26 **20%**

Digital share of fixed broadband activations

In Q1 '23 14% In Q1 '26 **80%**

Share of 100 Mbps+ activation in digital activation

38%

Digital revenue share in mobile service revenue in Q1 '26

Unique users include Türk Telekom Application & Online Transaction Web Application 3-month active user
Digital share of fixed broadband activations and share of 100 Mbps+ activation in digital activation are in the retail, consumer segment

Group Companies



Group Companies



5G and beyond next-generation telecommunication technologies R&D company and solution provider

- Netsia BB Suite: Broadband access solutions for fixed networks
- NCA Suite: Telecom network performance and customer experience management solutions (NPM/CEM)
- ULAK: Türkiye's first and only 4.5G (LTE-A) base station development project
- UTM: Drone/UAV tracking and traffic management system
- SMP: AI-powered customer service workflow management platform
- NSPM: Platform enabling AI-based analysis of network performance data
- DPI: Deep packet inspection platform for detailed network traffic analysis
- EIR: Platform for mobile device identity verification and management in telecom networks
- Private 5G Orchestration: AI-powered end-to-end private 5G network orchestration and telco edge cloud management platform for indigenous, open-source 5G+/6G technologies
- BBF member; via Netsia, membership in LFBB, LFN, and Open Power AI Consortium



Türkiye's leading software developer company & system integrator

- Smart Systems and IoT Solutions
- Artificial Intelligence and Data Analytics
- Cybersecurity Solutions
- Custom Solutions and Integration Services
- Cloud, Infrastructure and Platform Services
- FinTech and Payment Systems
- Outsourcing Services
- Field Services and On-site Operations Management
- Industry-specific Solutions (Public Sector, Education, Healthcare, Transportation, etc.)



International arm of the Group opening up to the World in wholesale data, voice, SMS and mobile roaming services

- 49.5 thousand kilometres fibre network covering Central and Eastern Europe, Türkiye and the Caucasus region
- More than 135 points of presence (PoP) in 24 countries
- Billions of minutes of transit voice traffic annually, close to 800 mobile roaming agreements and over 400 LTE mobile roaming agreements with more than 200 business partners
- Unique value-added solutions
- AMEERS and AMEER2: Routes connecting Western Europe to the Middle East
- SEA-ME-WE-5: Submarine cable system connecting Europe to Africa, the Middle East and Asia
- KAFOS: Submarine cable system extending from Black Sea to Europe
- MEDTÜRK: Submarine cable system connecting Middle East, Türkiye and Europe



Customer experience company that supports growth through end-to-end omnichannel and innovative solutions

- With a skilled workforce, 18 years of experience, and a strong infrastructure, delivering end-to-end excellent customer experience services 24/7 across industries ranging from telecommunications to media, healthcare to finance, logistics to e-commerce
- 12K employees and customer experience centers in 17 different cities across Türkiye
- Service export through AssisTT International established in the Netherlands
- Contact center solutions
- Digital services and technology solutions
- Customer experience and AI-powered automated quality solutions
- Outsourcing management solutions
- Compliance with PCI DSS, one of the world's most important data security standards
- Entrepreneurial Customer Representative business model implemented for the first time in Türkiye and globally

Group Companies



Türkiye's leading and long-established education technologies company

- Artificial intelligence-supported digital and printed educational solutions for elementary, middle, and high school levels
- SebitVCloud, a corporate education solution for private schools
- Raunt, a university entrance exam preparation product
- Vitamin LGS for the preparation of the National High School Entrance Exam (LGS)
- Vitamin Books for middle school level
- Vitamin Elementary for elementary school level
- Hızlıgo, a speed reading product for students in grades 5-12 and adults
- Turkish Telekom Academy for professional and personal development digital trainings
- A learning management system, Sebit LMS, that enables institutions from various sectors to effectively manage all their training needs
- Content and platform provider for e-education transformation projects in Türkiye and Northern Cyprus



Corporate venture capital company

- Focus on investments which contribute to the growth of early-stage startups with high scaling potential in the areas of artificial intelligence, digital solutions, healthcare, education, cybersecurity and financial technologies
- Healthcare & Wellnes: Virasoft, Kidolog and Albert
- Education: MentalUP
- Energy: Eltemtek
- Social Media: APPYAP
- Digital Marketing: Earnado
- Artificial Intelligence: Syntonym B2Metric, Optiyol, MythAI
- Telecom: QuantWiFi, Samm
- Fintech: Mindsite
- BioTech: Livzym, Trustlife



Payment services and electronic money company

- Value-adding products and services for both customers and the industry with innovative and reliable payment solutions
- CBRT license for payment an electronic Money services
- Strong position in mobile payments with its everexpanding network of merchant members
- Innovative fintech solutions with Pokus
- Growth in other payment services and products (Corporate Bill Payment, Bill Analytics, Virtual POS, Android POS etc.)



Türk Telekom's BRSA licensed financing company

- Individual and commercial financing compatible with digitalisation-led changing purchasing and payment habits
- Reaching a broad customer base through Türk Telekom's extensive dealer channel, contributing to the growth of the financial sector and increasing access to financing
- Easy and fast fintech experience in addition to financing support for customers' technological needs
- Rapid growth differentiated with focus on customer experience and continuous improvement



Appendix



Strategic Investments: Fixed Line Concession & Mobile 5G

Investing in Türk Telekom's future & growth and managing financial impact

Fixed-Line Concession Extension

- ▶ Enabling Türk Telekom's leading position in the market
- ▶ Concession Term: Until February 28, 2050
- ▶ Amount: USD 2.5 billion + VAT (to be net-off)
- ▶ Final Payment: By December 2035 (10 year payment terms)

5G License

- ▶ Spectrum Bands: 700 MHz and 3.5 GHz – highest capacity per customer in Türkiye
- ▶ License Term: Until December 31, 2042
- ▶ Amount: USD 1.1 billion + VAT (to be net-off)
- ▶ Final Payment: By May 2027

Long Term Payment Schedule

- ▶ Funding both investments via strong operational cash generation and long term financing

USD mn	2026		2027	2028-2034	2035
	Q1	Q4			
Concession-VAT	500				
Concession-Instalments		500	500	200 /year	100
5G-VAT	219				
5G-Instalments	365	365	365		
Total	1,083	865	865	1,400	100

Concession VAT was paid in Feb'26. All concession payments are due on the last business day of the related year.
5G VAT was paid in Jan'26. Of the three equal installments, the January 2026 installment has been paid; remaining installments are due in December 2026 and May 2027.

Balance Sheet

Concession & License Assets

Concession and license are recognized as intangible assets in TL terms at discounted value (net present value).

Amounts are periodically adjusted under inflation accounting, with corresponding updates to amortization expenses.

Concession & License Liabilities

Liabilities arising from the payment schedule are recognized as **other liabilities in USD terms at discounted to their present value.**

Profit & Loss Statement

Amortization Expense

Concession and license assets are **amortized on a straight-line basis over their useful lives.**

Useful Life & Amortization Expense:

- **Concession:** 24 years useful life. Mar 1, 2026 – Feb 28, 2050. About TL 308 mn monthly
- **5G License:** 16 years 9 months useful life. Apr 1, 2026 – Dec 31, 2042. About TL 249 mn monthly

Note: Amounts are in terms of purchasing power as of March 31, 2026. Amortization expense and value of assets will be updated in line with the periodic inflation adjustment of the asset value under inflation accounting

FX Impact

Foreign exchange gains/losses arising from FX-denominated liabilities are reflected in financial results.

Monetary Gain Impact

Recognized based on concession and 5G license assets under inflation accounting.

Discounting Effect

Discounted liabilities are unwound over time using the effective interest method and recognized as a finance expense.

Corporate Governance & Sustainability

Driving ESG progress via ongoing sustainability investments & initiatives resulting in higher ratings



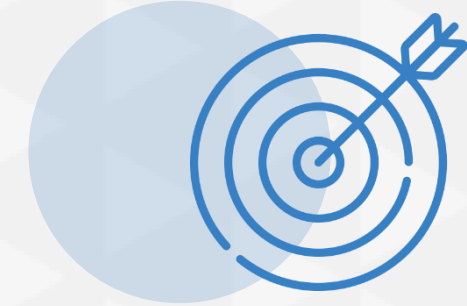
Improvement in Sustainable Fitch Rating

- ▶ Improved rating YoY and placed Türk Telekom into global top percentile
- ▶ Strong disclosure and data quality practices



Leadership in CDP Climate Change Program Maintained

- ▶ Leadership status continued with an 'A' rating
- ▶ 'A-' score was achieved in our first report under the CDP Water Security program



SBTi Verification Process

- ▶ Verification process ongoing
- ▶ Science-based targets prioritized within 2026 objectives

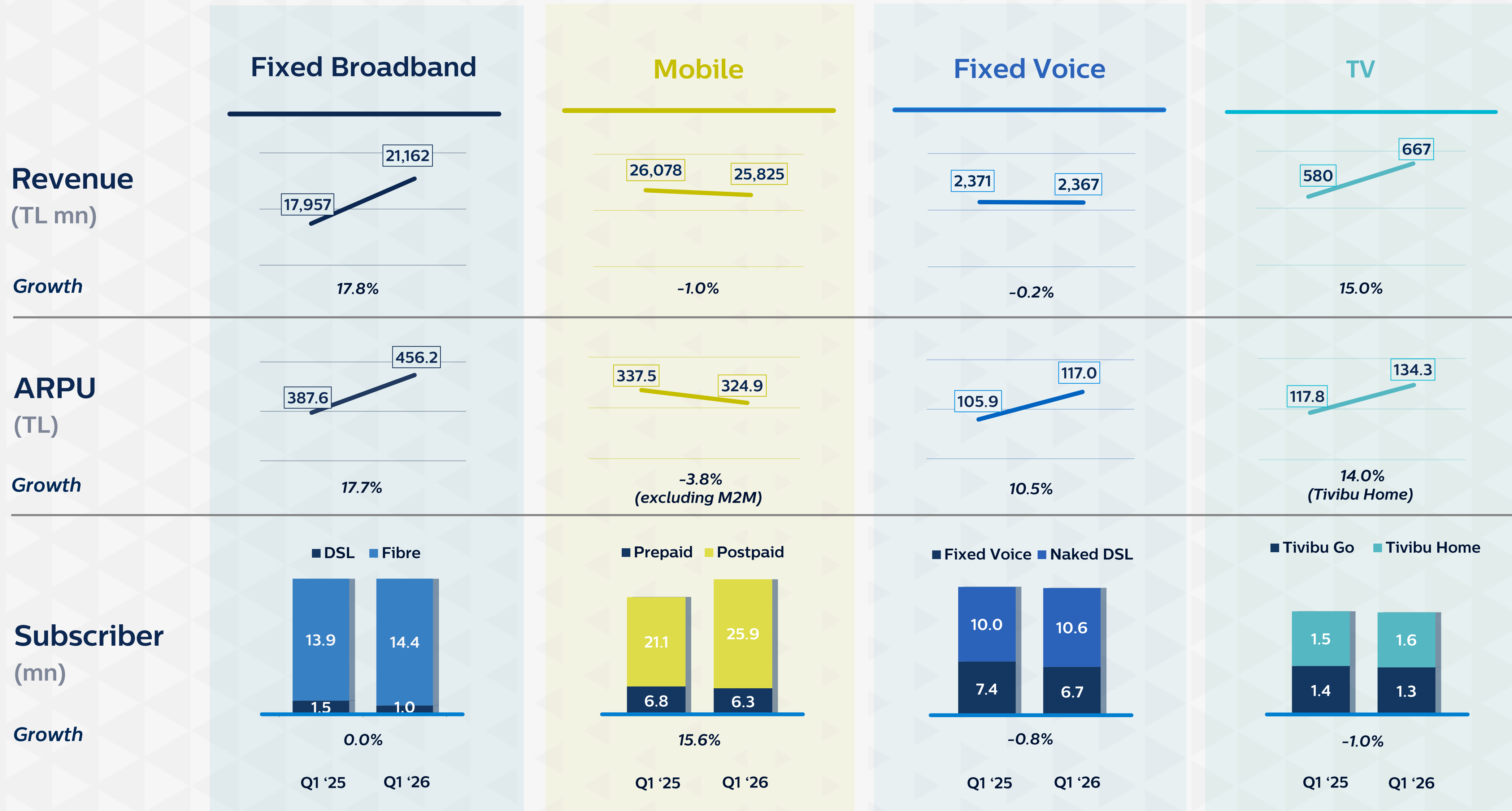


Solar Power Plant (SPP) Investments

- ▶ The first phase of the 405.8 MWe capacity SPP Project, with 96 MWe (128 MWp) capacity, has been completed and electricity generation has begun
- ▶ The first phase meets approximately 15% of our total electricity consumption

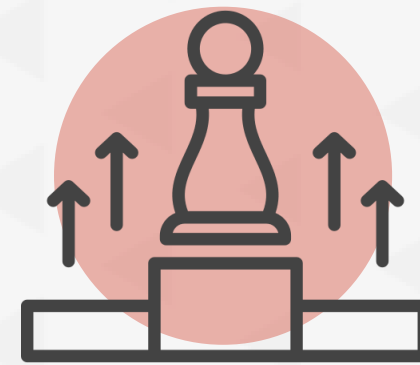
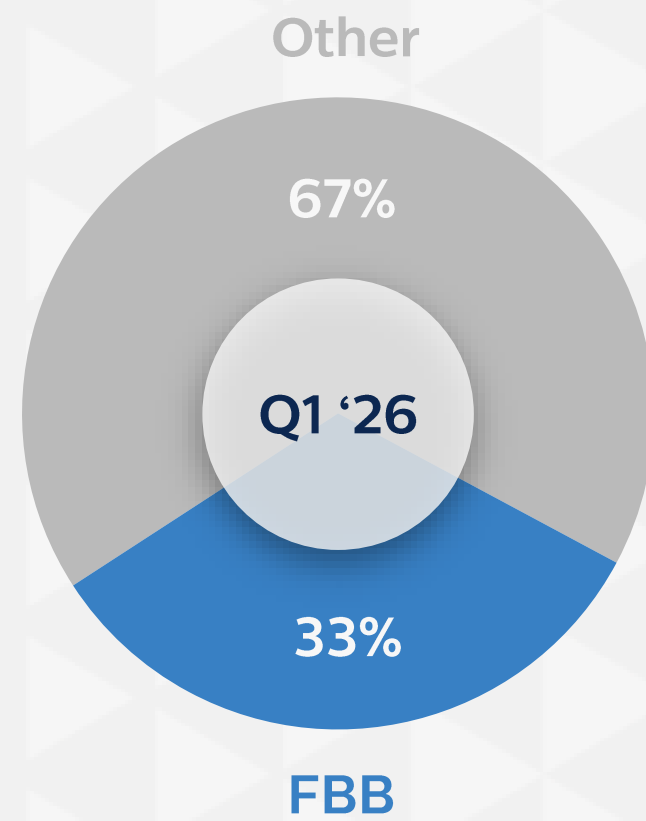


Business Lines Performance



Fixed Broadband at a Glance

FBB Revenue Share in TT (%)



74%

#1 TT's wholesale subscribers market share



15.4mn

Wholesale subscribers

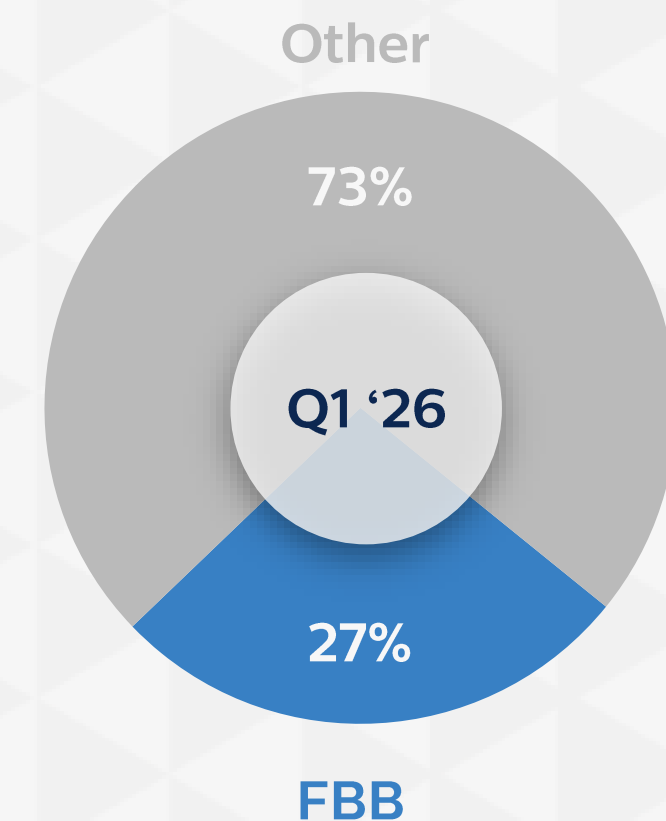
53%

#1 TT's retail subscribers market share

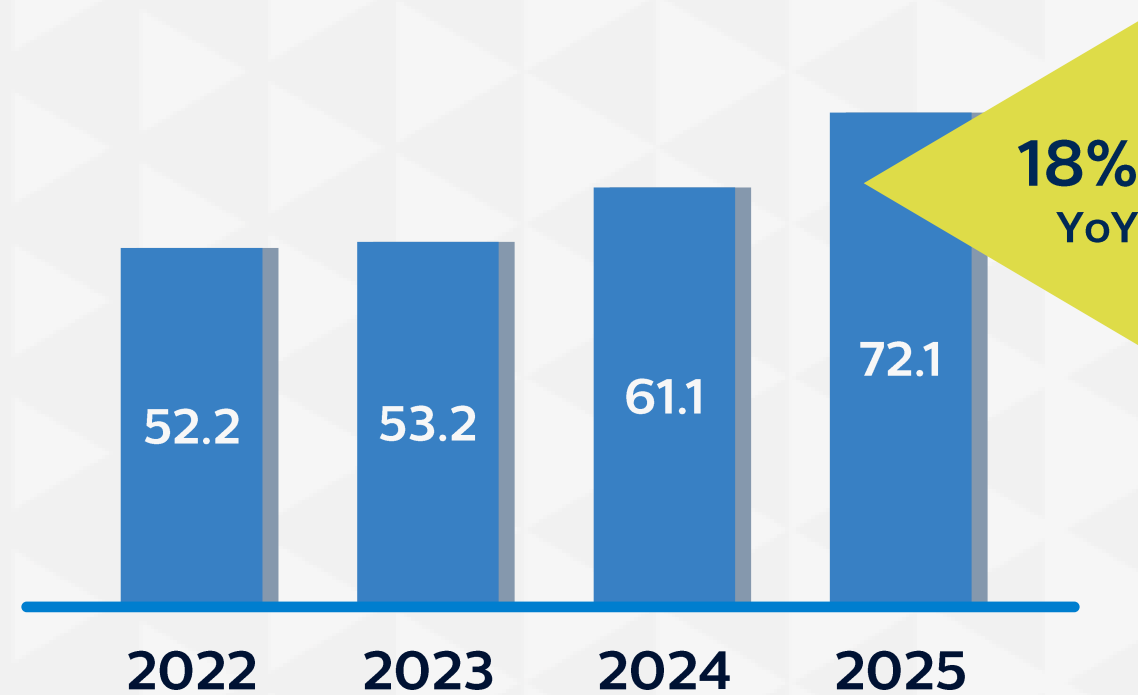
11.2mn

Retail subscribers

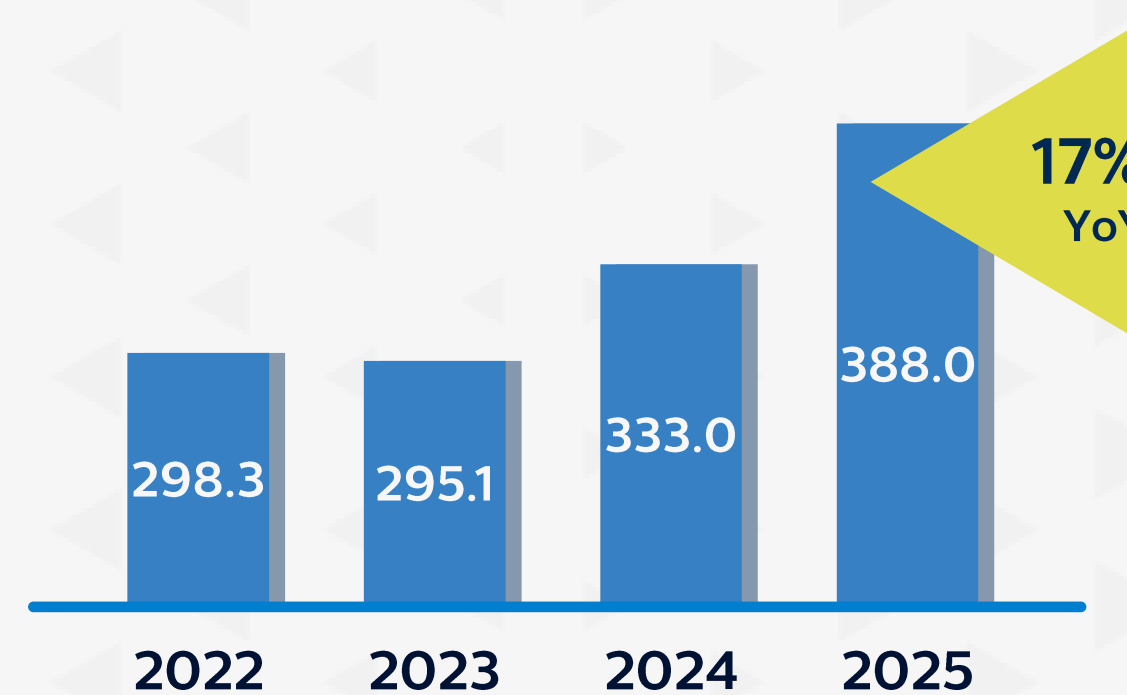
FBB Subscriber Share in TT (%)



FBB Revenue (bn TL)



FBB ARPU (TL)



FBB Subscriber (mn)

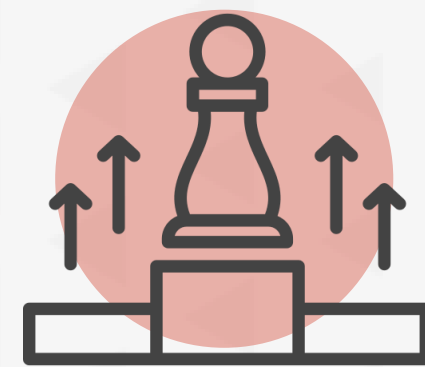
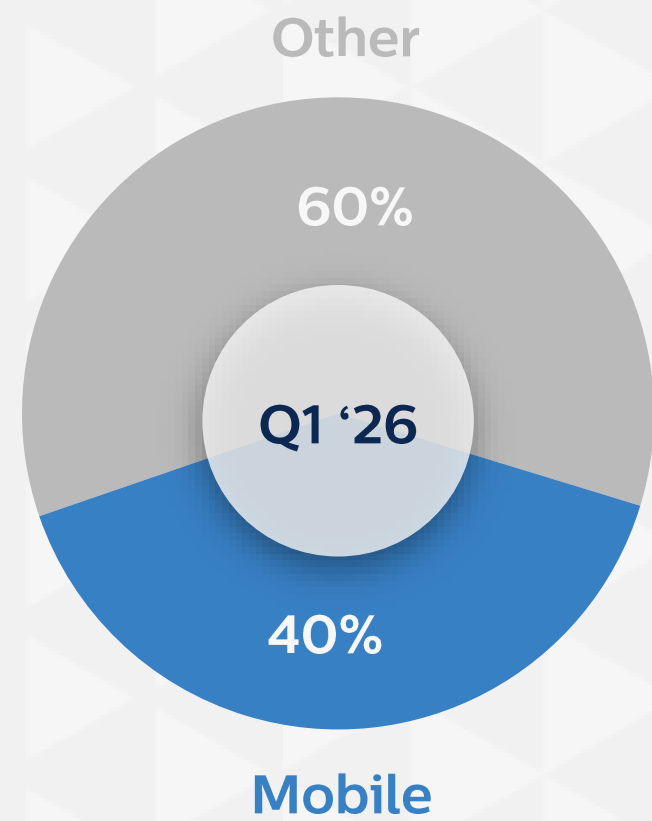


Market share and rank are from Q4 '25 ICTA report

FBB subscriber Includes ADSL

Mobile at a Glance

Mobile Revenue Share in TT (%)



32%

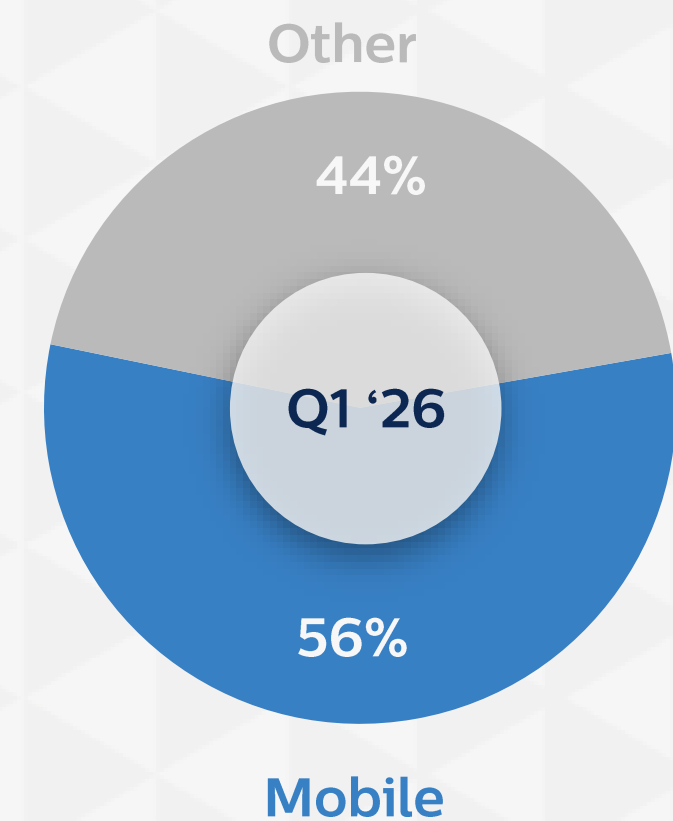
#2 TT's subscribers market share



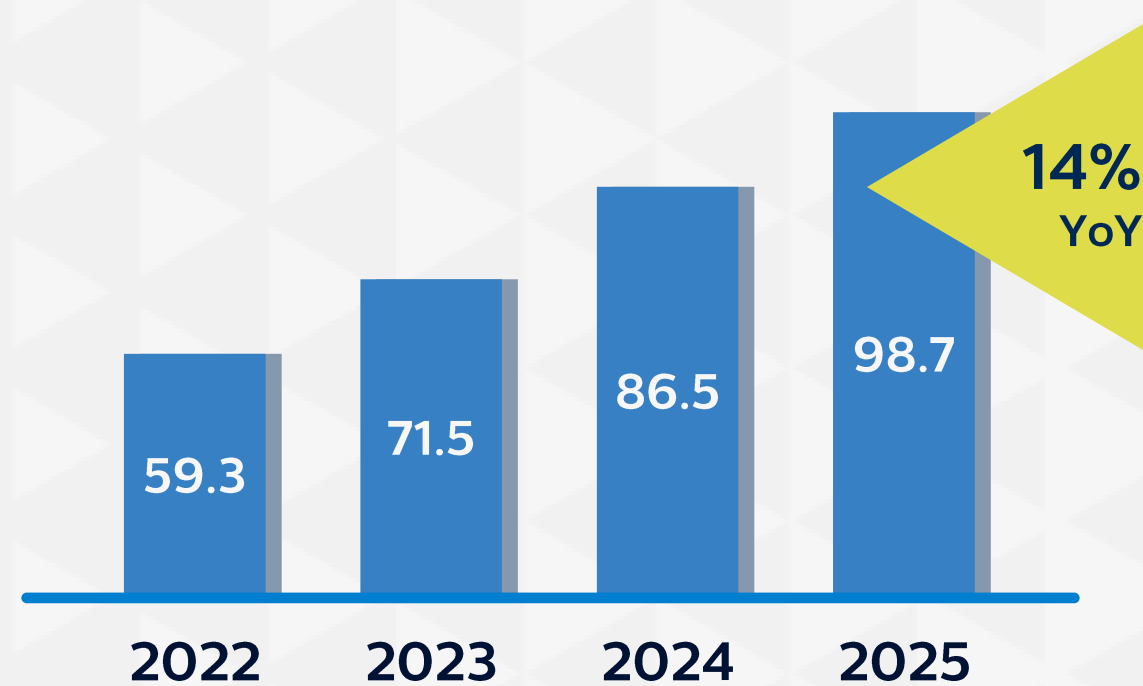
32.2mn

Subscribers

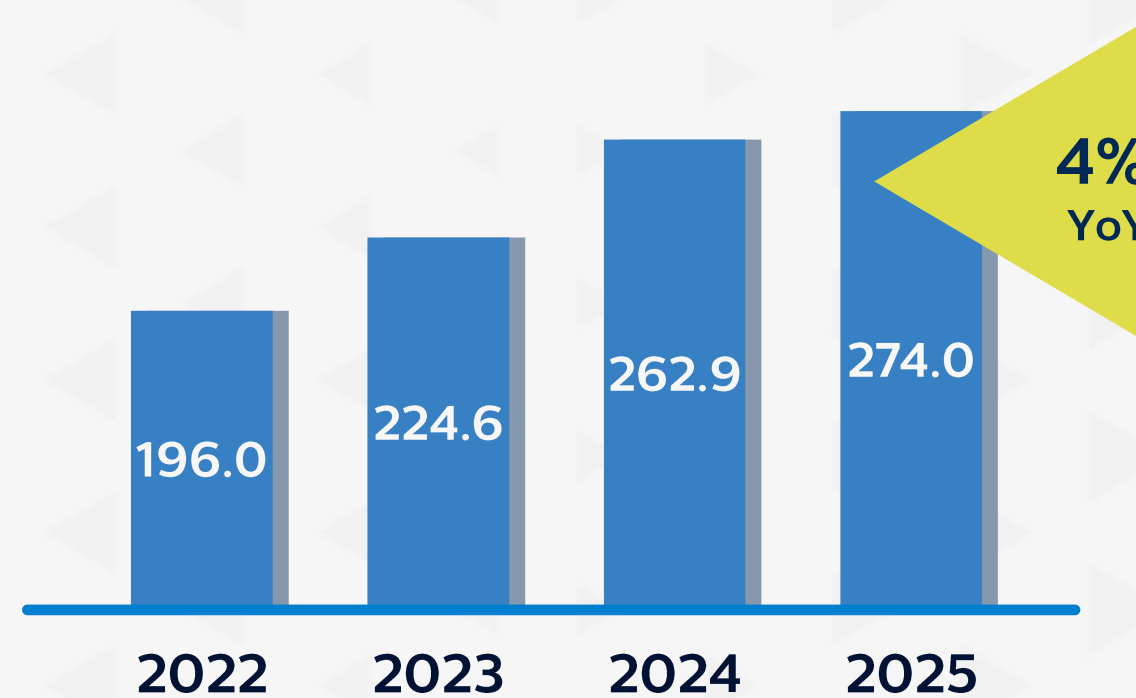
Mobile Subscriber Share in TT (%)



Mobile Revenue (bn TL)



Mobile ARPU (TL)



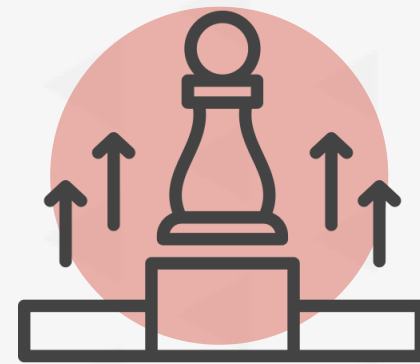
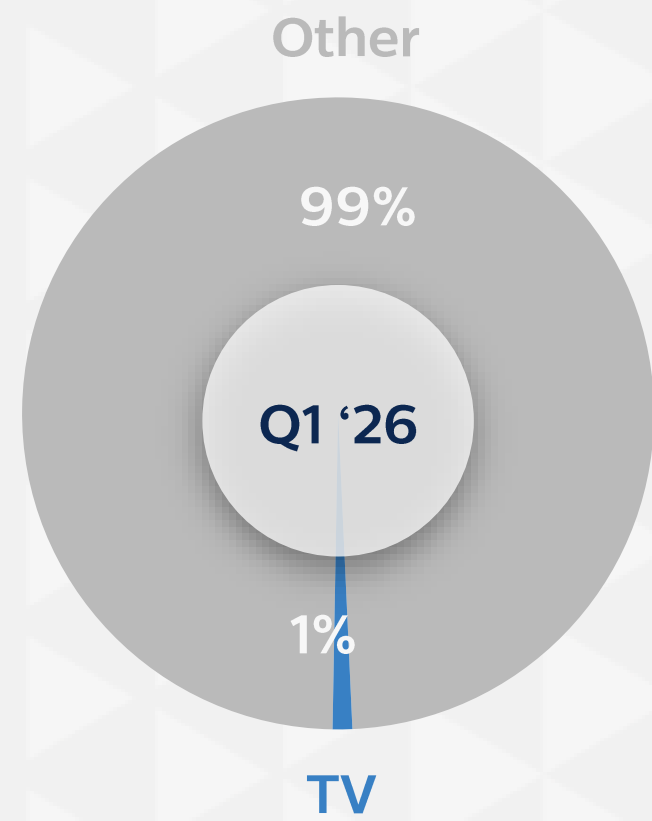
Mobile Subscriber (mn)



Market share and rank are from Q4 '25 ICTA report

TV at a Glance

TV Revenue Share in TT (%)



19%

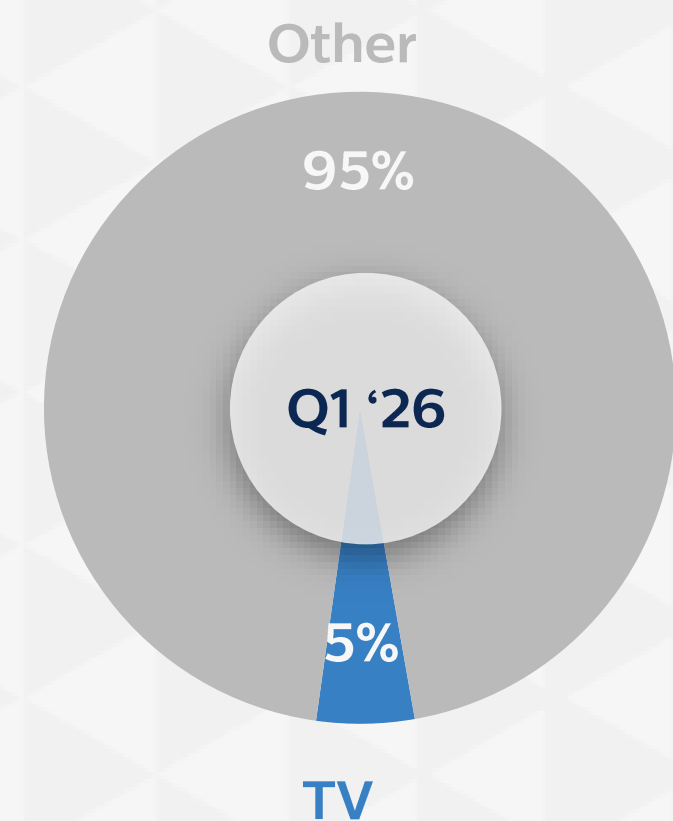
#3 TT's subscribers market share



2.9mn

Subscribers

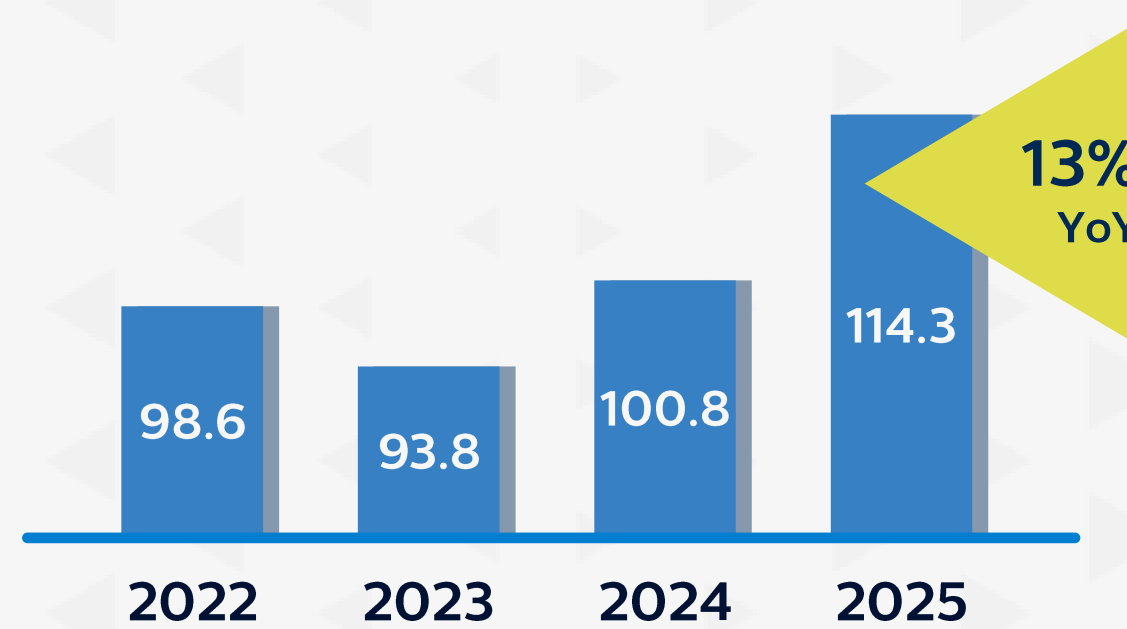
TV Subscriber Share in TT (%)



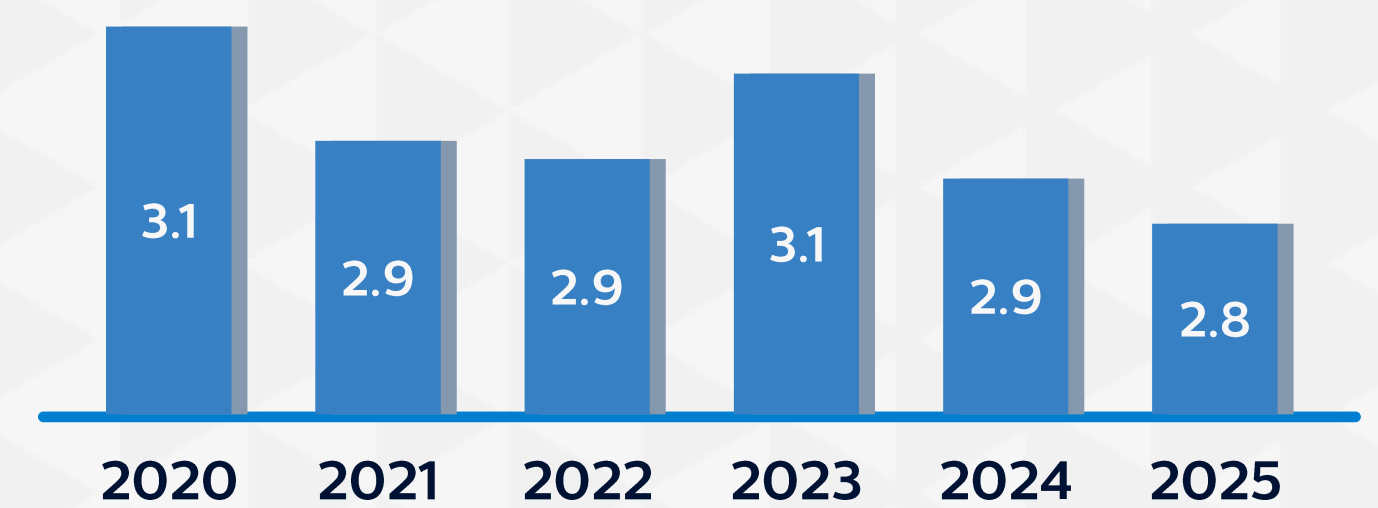
TV Revenue (bn TL)



TV Home ARPU (TL)



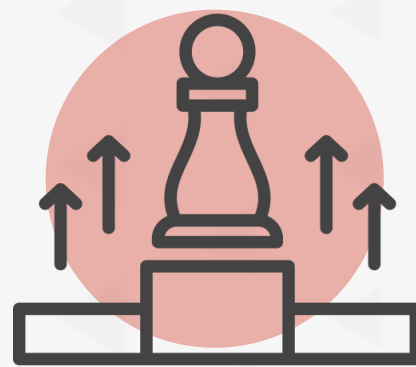
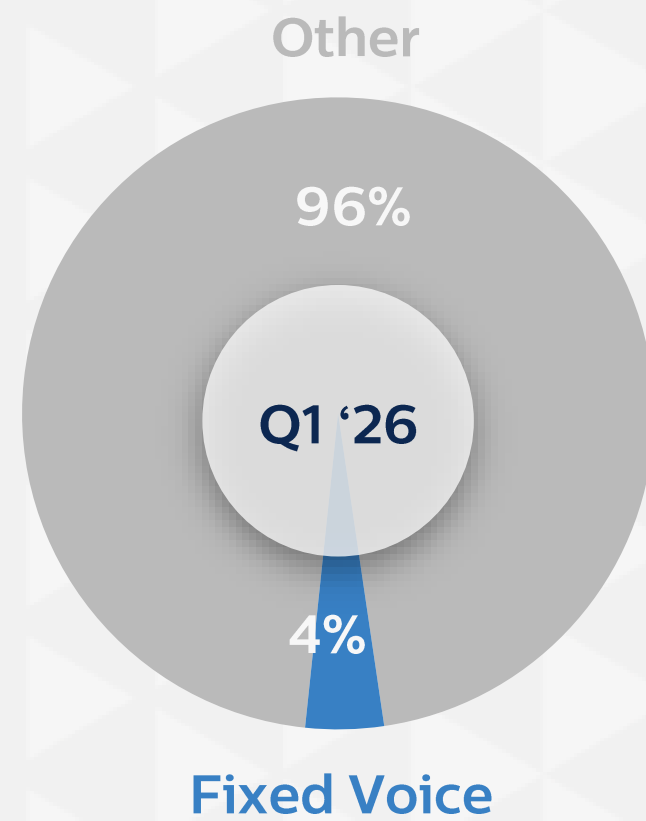
TV Subscriber (mn)



Market share and rank are from Q4 '25 ICTA report

Fixed Voice at a Glance

Fixed Voice Revenue Share in TT (%)



81%

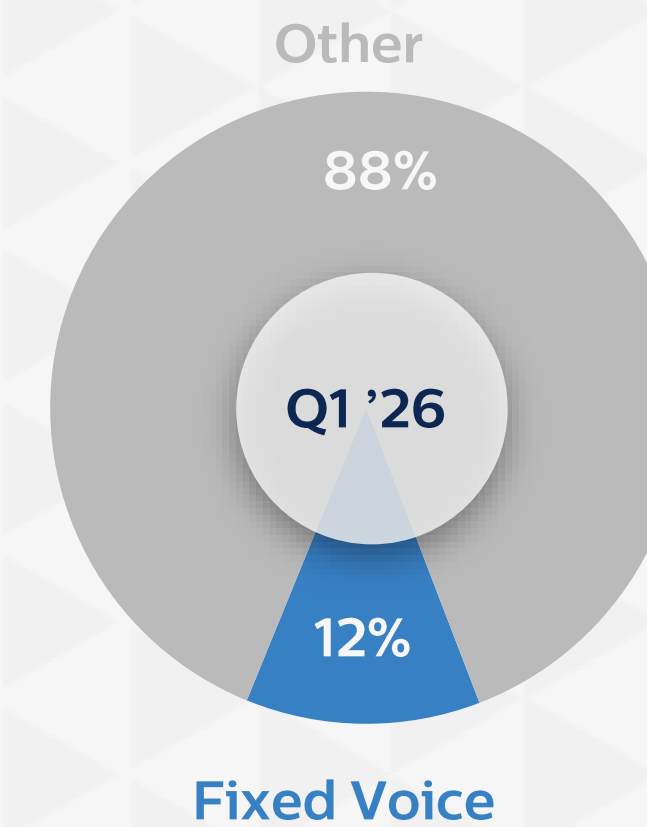
#1 TT's subscribers market share



6.7mn

Subscribers

Fixed Voice Subscriber Share in TT (%)



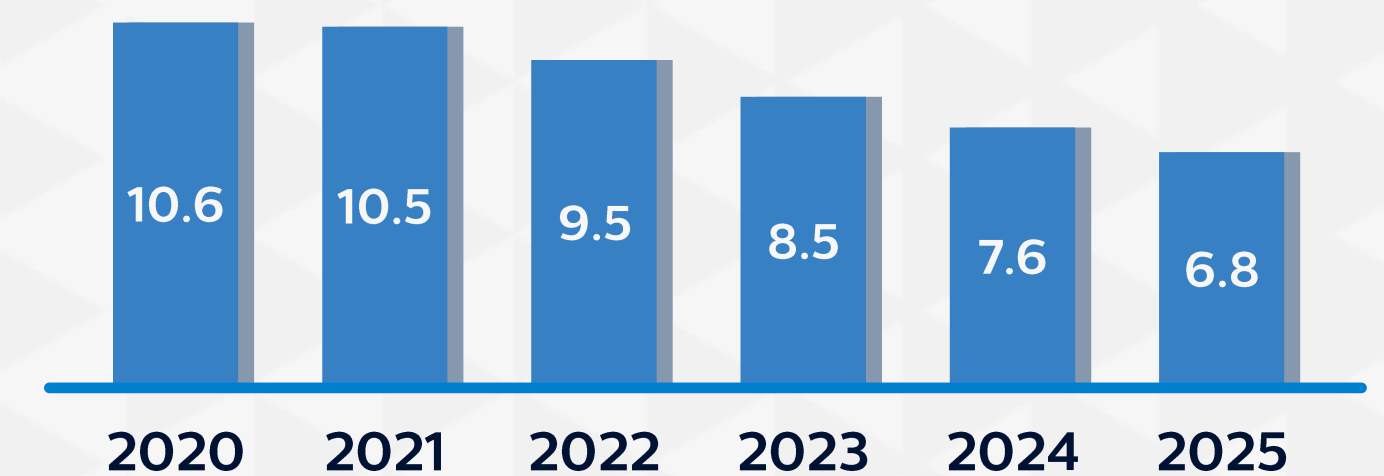
Fixed Voice Revenue (bn TL)



Fixed Voice ARPU (TL)



Fixed Voice Subscriber (mn)



Market share and rank are from Q4 '25 ICTA report

Income Statement

Solid revenue & EBITDA performance supported by operational efficiency resulting in robust profitability

(TL mn)	Q1 '25	Q1 '26	YoY Change
Revenues	59,671	64,858	8.7%
EBITDA	23,441	27,438	17.1%
Margin	39.3%	42.3%	
Operating Profit	10,775	12,735	18.2%
Margin	18.1%	19.6%	
Financial Inc. / (Exp.)	(7,217)	(9,151)	26.8%
FX & Hedging Gain / (Loss)	(4,102)	(8,513)	107.5%
Interest Inc./ (Exp.)	(2,188)	659	n.m.
Other Financial Inc./ (Exp.)	(927)	(1,297)	39.9%
Monetary Gain/Loss, net	7,753	13,988	80.4%
Tax Inc./ (Exp.)	(4,592)	(7,115)	54.9%
Net Income	6,719	10,457	55.6%
Margin	11.3%	16.1%	

All figures presented at their values as of Q1 '26

Balance Sheet

Intangible assets, other assets, and other liabilities YoY movement impacted by concession and 5G spectrum

(TL mn)	31.12.2025	31.03.2026
Total Assets	469,505	601,472
Cash and Cash Equivalents	73,664	30,437
Tangible Assets	181,979	188,014
Intangible Assets	145,143	281,391
Right of Use Assets	12,140	12,150
Other Assets	56,579	89,480
Total Equities and Liabilities	469,505	601,472
Share Capital	110,720	110,720
Reserves, Retained Earnings and Other Equity Items	123,051	132,878
Interest Bearing Liabilities	137,519	141,977
<i>Bank Borrowings and Bonds</i>	<i>131,511</i>	<i>136,460</i>
<i>Lease Liabilities</i>	<i>6,008</i>	<i>5,518</i>
Other Liabilities	98,215	215,897

Tangible assets include property, building or plant and equipment and investment property

Major items within other assets are trade receivables, due from related parties, inventories, deferred tax asset, tax assets and other current assets.

Interest bearing liabilities includes short-term and long-term borrowings and lease obligations

Major items within other liabilities are deferred tax liability, trade payables, provisions, income tax payable, due to related parties, other current liabilities and provisions for employee termination benefits

All figures presented at their values as of Q1 '26

Revenue Breakdown

(TL mn)	Q1 '25	Q1 '26	YoY Change
Fixed Voice	2,371	2,367	(0.2)%
Broadband	17,957	21,162	17.8%
Mobile	26,078	25,825	(1.0)%
TV	580	667	15.0%
Corporate Data	3,912	5,011	28.1%
International Revenues	2,339	1,697	(27.5)%
Other	4,611	4,580	(0.7)%
Eliminations	(52)	(82)	58.0%
Revenue w/o IFRIC	57,797	61,227	5.9%
IFRIC12	1,874	3,631	93.8%
Total Revenue	59,671	64,858	8.7%

Other includes ICT companies, device sales, domestic interconnection and other revenues

All figures presented at their values as of Q1 '26

Opex Breakdown

(TL mn)	Q1 '25	Q1 '26	YoY Change
Direct Costs	11,100	10,715	(3.5)%
Interconnection	2,081	1,303	(37.4)%
Tax	5,996	6,018	0.4%
Provisions for Doubtful Receivables	278	314	12.8%
Cost of Equipment and Technology Sales	1,600	1,822	13.8%
Other Direct Costs	1,144	1,258	10.0%
Commercial Costs	2,031	2,594	27.7%
Other Costs	21,441	20,898	(2.5)%
Network & Technology	4,920	4,986	1.3%
Personnel	15,484	14,843	(4.1)%
Other	1,036	1,069	3.1%
Sub Total	34,572	34,207	(1.1)%
IFRIC(12)	1,658	3,213	93.8%
Total OPEX	36,230	37,420	3.3%

All figures presented at their values as of Q1 '26

Subscriber Data

(mn)	Q1 '25	Q1 '26	YoY Change
Total Access Line	17.4	17.3	(0.8)%
Fixed Voice Subscribers	7.4	6.7	(9.9)%
Naked Broadband Subscribers	10.0	10.6	5.8%
Broadband Total Subscribers	15.4	15.4	0.0%
Fibre Subscribers	13.9	14.4	4.0%
FTTH/B Subscribers	5.6	7.1	27.2%
FTTC Subscribers	8.3	7.3	(11.7)%
Total Tivibu Subscribers	2.9	2.9	(1.0)%
Tivibu Home Subscribers	1.5	1.6	0.8%
Mobile Total Subscribers	27.9	32.2	15.6%
Mobile Postpaid Subscribers	21.1	25.9	22.7%
M2M Subscribers	2.8	6.3	125.2%
Mobile Prepaid Subscribers	6.8	6.3	(6.5)%

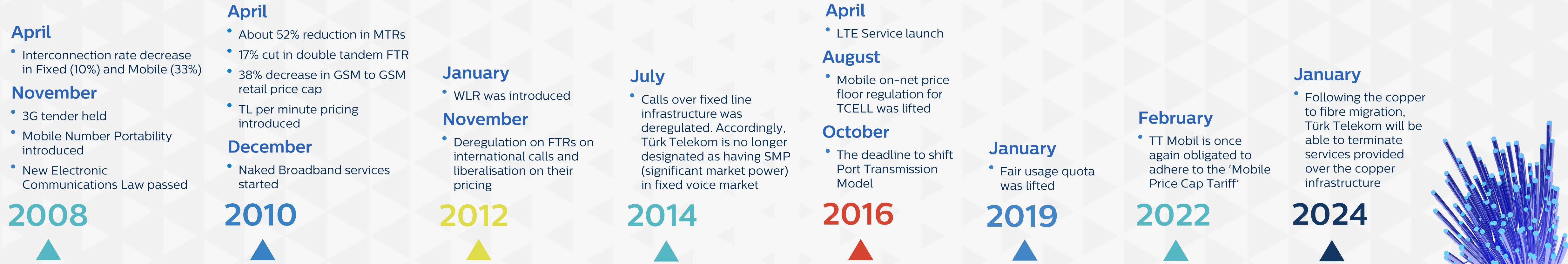
Fixed voice includes PSTN and WLR subscribers
 Total Tivibu includes IPTV, DTH, and Tivibu GO subscribers
 Tivibu Home includes IPTV and DTH subscribers

ARPU Performance

(TL)	Q1 '25	Q1 '26	YoY Change
Fixed Voice ARPU	105.9	117.0	10.5%
Broadband ARPU	387.6	456.2	17.7%
Home TV ARPU	117.8	134.3	14.0%
Mobile Blended ARPU	305.3	265.0	(13.2)%
Mobile Blended ARPU (excluding m2m)	337.5	324.9	(3.8)%
Mobile Postpaid ARPU	340.7	284.4	(16.5)%
Mobile Postpaid ARPU (excluding m2m)	390.3	369.4	(5.3)%
Mobile Prepaid ARPU	184.6	166.7	(9.7)%

All figures presented at their values as of Q1 '26

Regulatory Actions



April

- Interconnection rate decrease in Fixed (10%) and Mobile (33%)

November

- 3G tender held
- Mobile Number Portability introduced
- New Electronic Communications Law passed

April

- About 52% reduction in MTRs
- 17% cut in double tandem FTR
- 38% decrease in GSM to GSM retail price cap

December

- TL per minute pricing introduced

December

- Naked Broadband services started

January

- WLR was introduced

November

- Deregulation on FTRs on international calls and liberalisation on their pricing

July

- Calls over fixed line infrastructure was deregulated. Accordingly, Türk Telekom is no longer designated as having SMP (significant market power) in fixed voice market

April

- LTE Service launch

August

- Mobile on-net price floor regulation for TCELL was lifted

October

- The deadline to shift Port Transmission Model

January

- Fair usage quota was lifted

February

- TT Mobil is once again obligated to adhere to the 'Mobile Price Cap Tariff'

January

- Following the copper to fibre migration, Türk Telekom will be able to terminate services provided over the copper infrastructure

2009

January

- About 50%-55% reduction in MTRs on SMS

March

- Reduction in SCT rate (25% to 5%) on internet services

April

- On-net price floor for TCELL

May

- About 29% reduction in MTRs
- MVNO regulation in place

July

- 3G service launch

September

- Fixed number portability introduced
- Local call liberalisation

2011

April

- Mobile off-net price cap was increased by 4%
- SMS price cap was decreased by 48%

September

- Deregulation on MTRs on international calls and liberalisation on their pricing

October

- ICTA's fibre decision: FTTH/B will be excluded from the market analysis process until 25% fibre market share or for 5 years

2013

March

- Mobile on-net price floor for TCELL formulated by Mobile Termination Rate 1.7x

April

- 75% reduction in MTRs on SMS

July

- 20% reduction in MTRs

September

- Duct Sharing officially started

2015

August

- LTE tender was held

2018

January

- SCT rates for mobile voice, fixed voice, mobile data, and fixed data was unified at 7.5%

2021

January

- SCT rates for mobile voice, fixed voice, mobile data, and fixed data was unified at 10%

June

- Within 3 years from January 2022, mobile interconnection fees were decided to be gradually equalised at 2.10 kurus for all operators

2023

January

- Türk Telekom submitted its application to ICTA for the extension of the Concession Agreement for the fixed line services, which is valid until 28.02.2026

July

- The general VAT rate increased from 18% to 20%, while the reduced VAT rate of 8% increased to 10%

2025

August

- The Concession Agreement for the fixed line services has been amended and extended until February 28,2050

October

- 5G tender was held



History

1995

Separation from Post Office

Türk Telekom separated from the Post Office

2004

Aycell Merger with Aria

Aycell merged with İŞ-TİM's Aria and officially named "Avea İletişim Hizmetleri A.Ş."

2006

Avea Share Transaction

Acquisition of İŞ-TİM's 40.55% stake in Avea, raising total stake in Avea to 81.12%

2010

Invitel Acquisition

Acquired Pantel (rebranded as Türk Telekom International), the leading wholesale capacity and data services provider in Central and Eastern Europe to complement its international carrier business and infrastructure

2014

Bond Issuance

Türk Telekom issued USD 1 bn bond in two tranches of USD 500 mn each, with maturities of 5 and 10 years

2016

Brand Unification

Türk Telekom unified mobile, fixed voice, fixed broadband and TV brands under single "Türk Telekom" brand, while keeping Türk Telekomünikasyon A.Ş., TTNET A.Ş., and Avea İletişim Hizmetleri A.Ş. legal entities intact

2019

Bond Issuance

Türk Telekom successfully completed its USD 500 mn bond offering with 6 year maturity

2022

Shareholder Change

Share Purchase Agreement between LYY and TWF has been completed. LYY sold its 55% stake in TTKOM to TWF.

Establishment of a Consumer Finance Company

Consumer Finance company TT Finansman A.Ş. was established.

2024

Commitment to Reducing Carbon Emission

Targeting a 45% reduction in Türk Telekom Group's Scope 1 & 2 emissions in total by 2030 and Net Zero by 2050

Sustainable Bond Issuance

Türk Telekom issued its first sustainability bond of USD 500 mn with a maturity of 5 years

2001

Aycell Established

Türk Telekom's GSM operator, Aycell established (Aycell later named as AVEA after merging with Aria in 2004)

2005

Privatisation

Privatised through a 55% stake sale to Oger Telecom

2008

Public Offering

IPO with a listing on the Istanbul Stock Exchange and the sale of 15% stake owned by the Treasury to the public

3G

3G tender

2013

Integration Project Initiated

Integration project towards a customer oriented organisation

2015

Avea Share Transaction

Avea share transfer completed; Türk Telekom has become the sole owner of Avea İletişim Hizmetleri A.Ş.

LTE

LTE tender

2018

Establishment of CVC

The Corporate Venture Capital Company was established under "TT Ventures Proje Geliştirme A.Ş."

Shareholder Change

55% shares of Türk Telekom transferred to LYY Telekomünikasyon A.Ş. (LYY) from OTAS

2020

Bond Issuance

Türk Telekom issued its first domestic bond of TL 150 mn with a maturity of 402 days

2023

Establishment of Sustainability Committee

Türk Telekom established a Sustainability Committee to strengthen its ESG governance

Renewable Energy Investments

405.8 MWe of SPP installed capacity has been allocated to Türk Telekom

2025

CDP's A List

Türk Telekom recognised on CDP's A List for corporate sustainability

Extension of Concession Agreement

Fixed Line Concession Agreement extended until February 28, 2050

5G

5G tender was held

Green Bond & Sukuk Issuance

Türk Telekom issued USD 600 mn green bond with 7-year maturity and USD 600 mn sukuk with 5-year maturity

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Türk Telekom
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