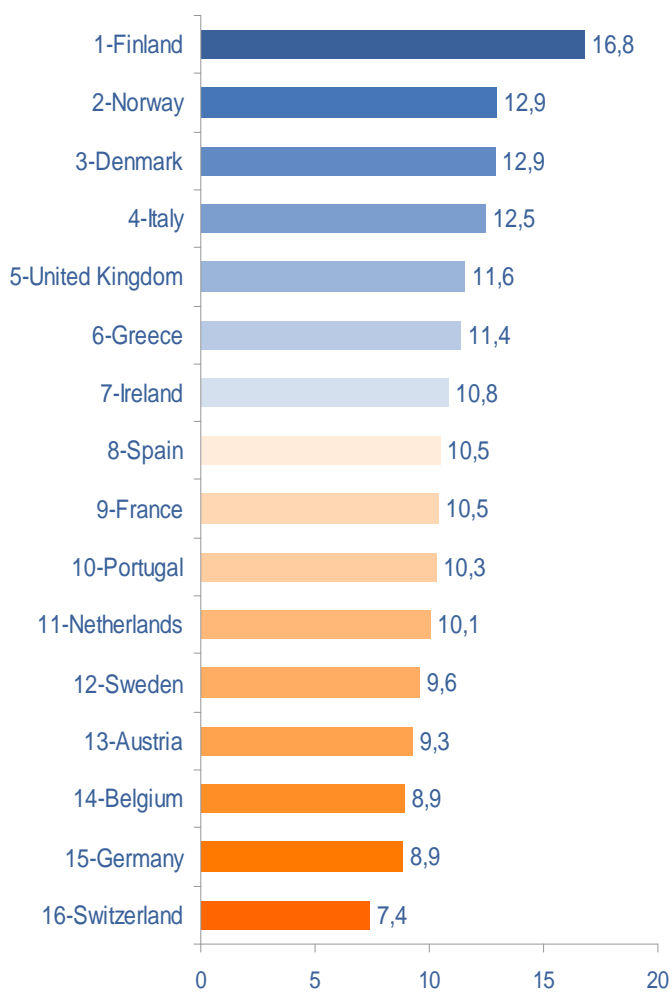


PERFORMANCE REVIEW OF EUROPEAN MOBILE MARKETS

This 5th edition of the Performance Review of European Mobile Markets reviews 16 European mobile markets, showing how diverse these markets are in terms of macro-economic performances, usage and price and competitive performance structure. A rank had been done by taking into account 14 indicators

Finland tops the ranking while Switzerland closes it. France is at the 9th position just behind Spain and before Portugal. The scores below are out of 20.

Overall ranking of 16 European Countries



Source: Quantifica

5th edition updated

- Offers updated information on European mobile market
- New benchmark of European national markets
- MVNOs impact on European market
- All data are extracted from Quantifica data base



14 INDICATORS COMPRISING 3 CATEGORIES

MACRO-ECONOMIC INDICATORS

- Impact of the mobile industry in GDP
- Mobile growth contribution to GDP between 2001 and 2005
- Mobile penetration rate (SIM cards) in overall population
- Weight of outbound mobile traffic in the country's telecommunications industry

USAGE AND PRICE INDICATORS

3 usage indicators

- Outbound mobile consumption in minutes per SIM card/month
- Inbound mobile consumption in minutes per SIM card/month
- Number of text messages (SMS) per SIM card/month

4 price indicators

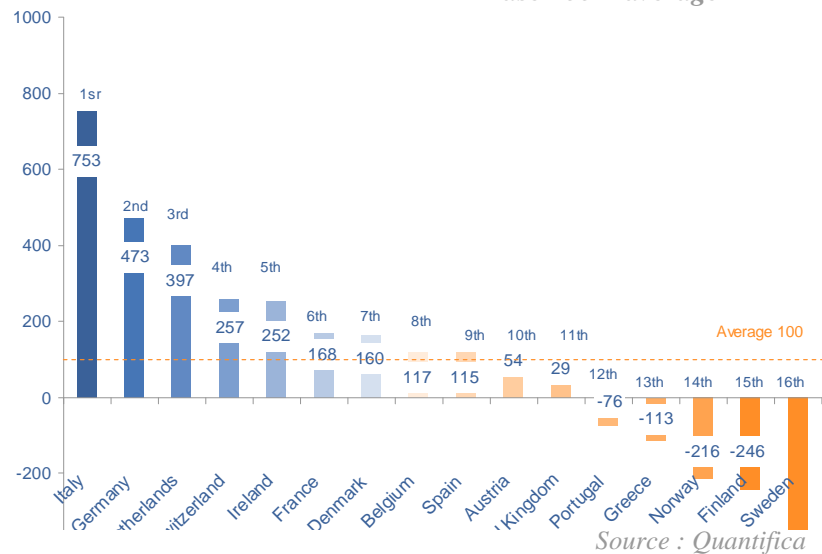
- Average price of outbound minute (€/min/month)
- Average price of inbound minute (€/min/month)
- Average price of text messages (SMS) in euros/ month
- Average revenue per subscriber (composite) comparing subscriber composite for average consumption

COMPETITIVE STRUCTURE INDICATORS

- Concentration index for operators' infrastructure (HHI in value)
- Concentration index normalised for operating infrastructure (restated HHI)
- Presence of virtual mobile operators (MVNO)

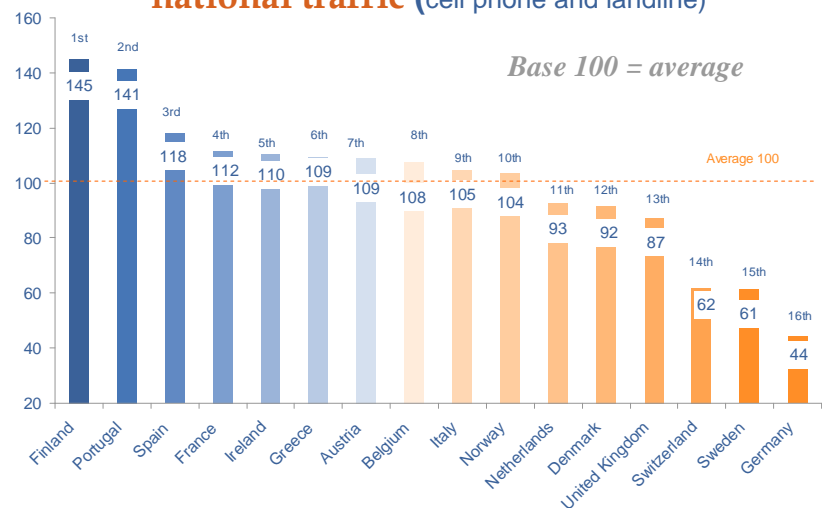
The mobile industry's contribution to GDP growth between 2001- 2007

Base 100 = average



Outbound cell phone traffic for total outbound national traffic (cell phone and landline)

Base 100 = average





Who are we?

Launched in 1988, Quantifica is a global leader supplying data in the electronic communications and media markets at large. Quantifica offers three types of products and services:

1. Buy data online either by data item (€ 3/item), or with various formulas and tailored subscriptions
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Our services and products are recognized for their relevance and the reliability of our information. Our clients are renowned worldwide, be they consulting companies, telecommunications operators, regulators and equipment manufacturers.

These professionals use our telecom market research data for its pertinence and reliability to build their reports, anchor their strategic analyses, and validate their benchmarks.

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