

# Mobile Observatory

DECEMBER 31st 2004

## **Global mobile telephony market**

**Market size**

**Penetration rate**

**Market growth by operator**

**Market shares**

**Post-paid/ Prepaid market repartition**

### **Post-paid market**

**Post-paid market size**

**Post-paid penetration rate**

**Post-paid Net ads**

### **Prepaid Market**

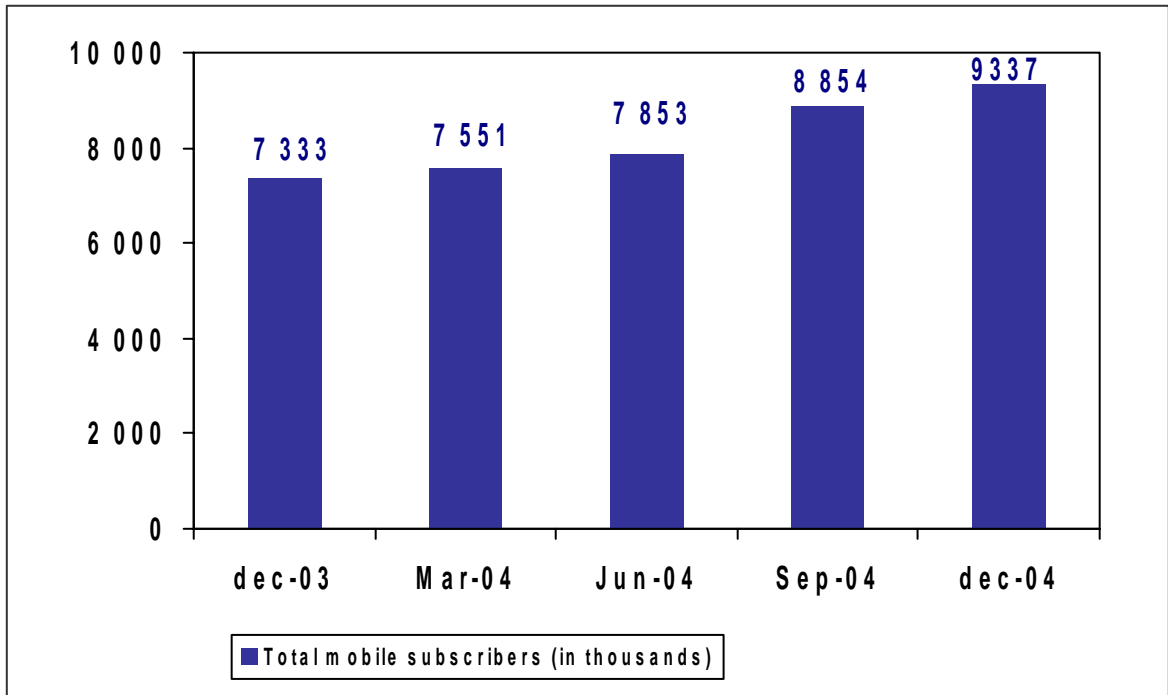
**Prepaid market size**

**Prepaid penetration rate**

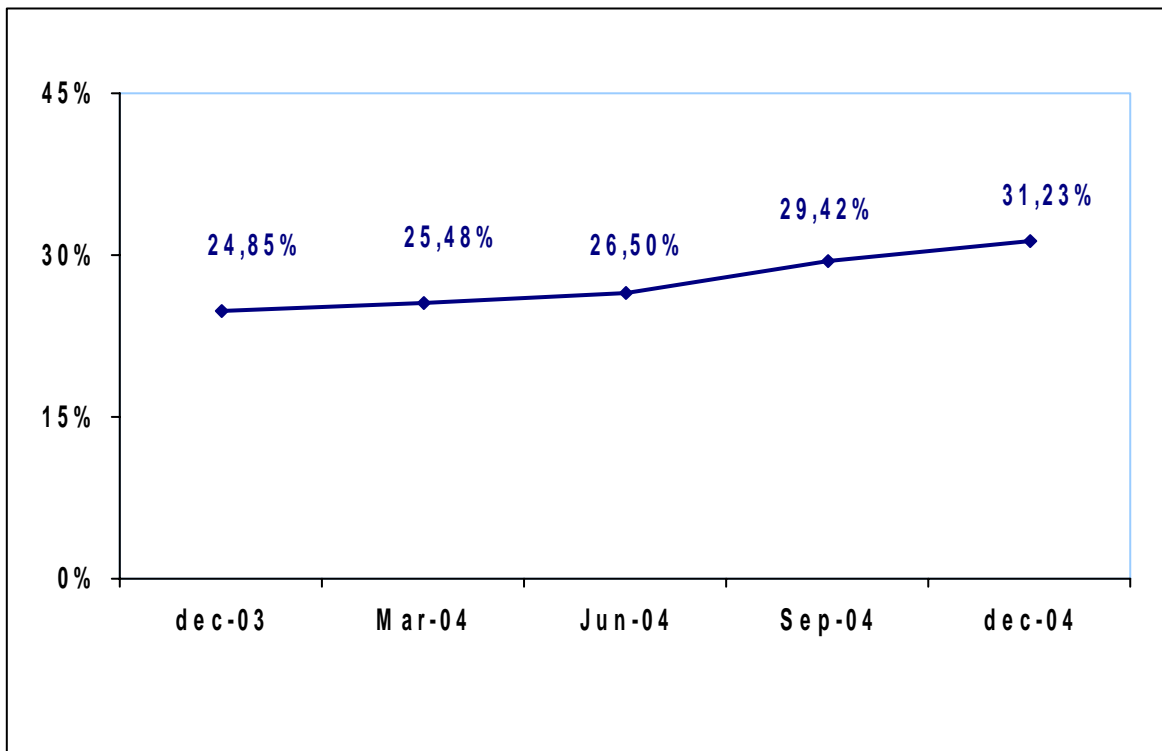
**Prepaid Net ads**

## **Global mobile telephony market**

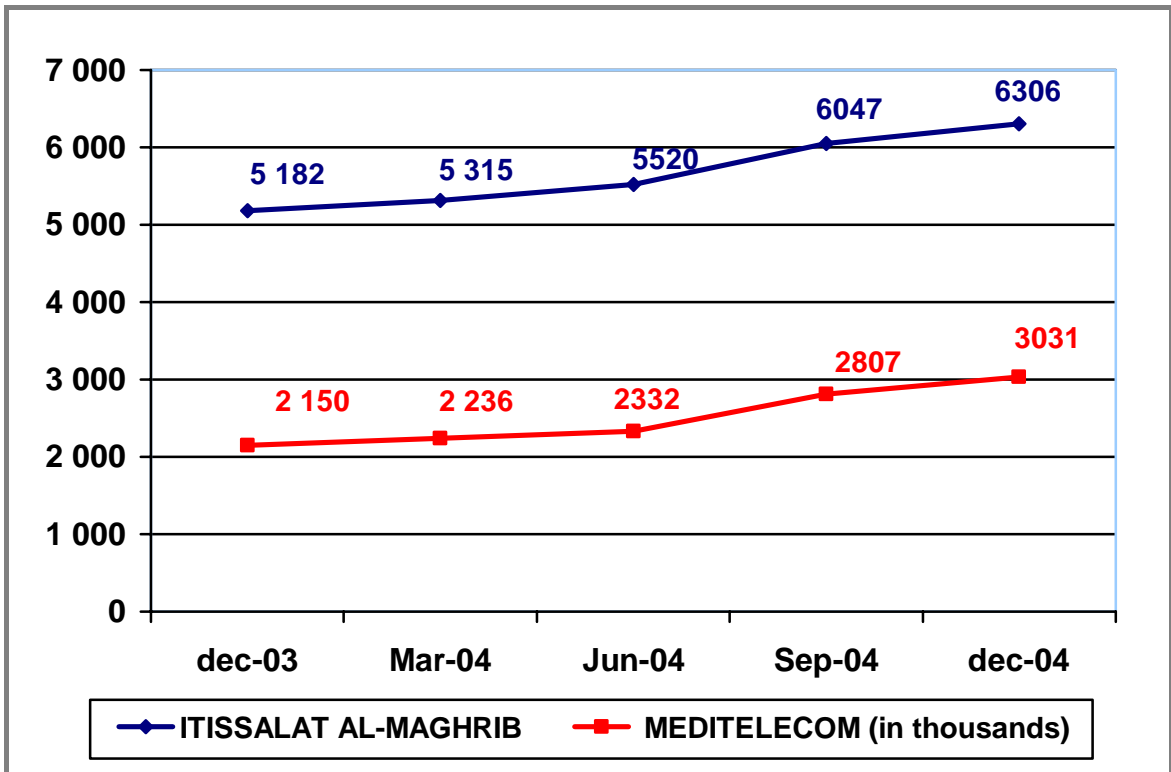
**Market size evolution**



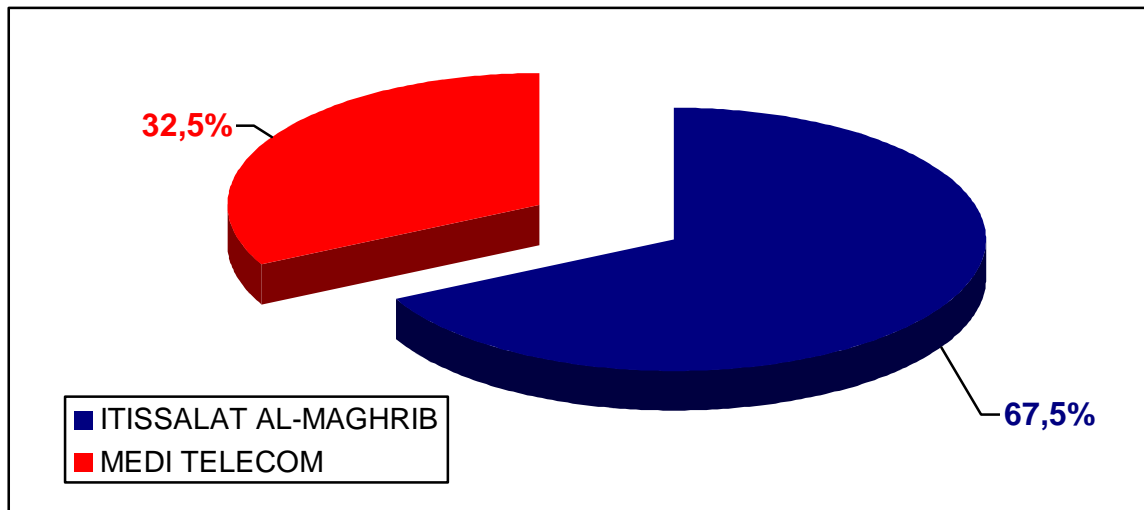
### Penetration rate



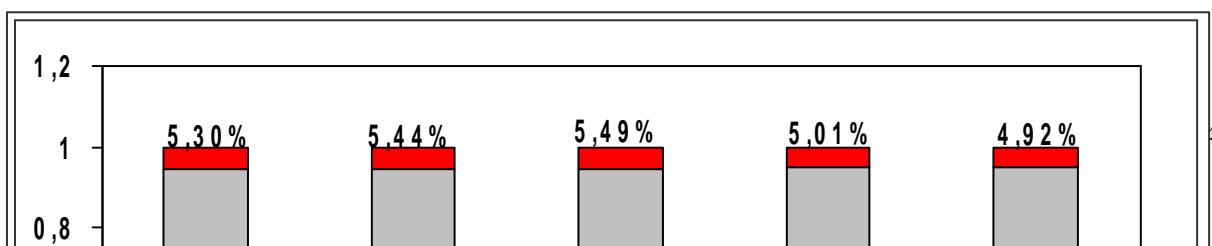
### Market growth by operator



### Market shares at December 31<sup>st</sup> 2004

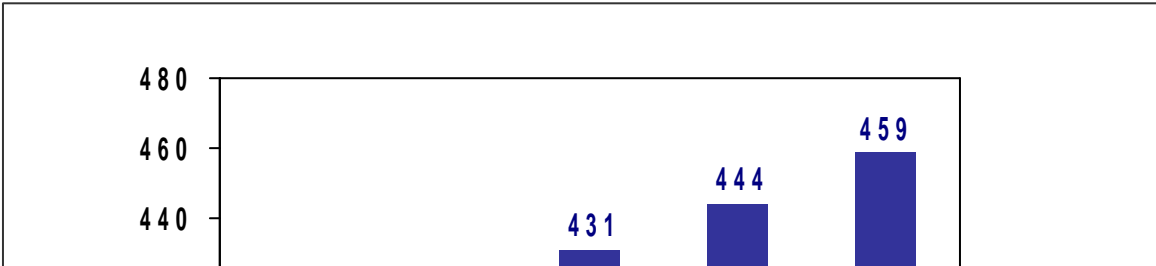


### Post-paid/ Prepaid market repartition

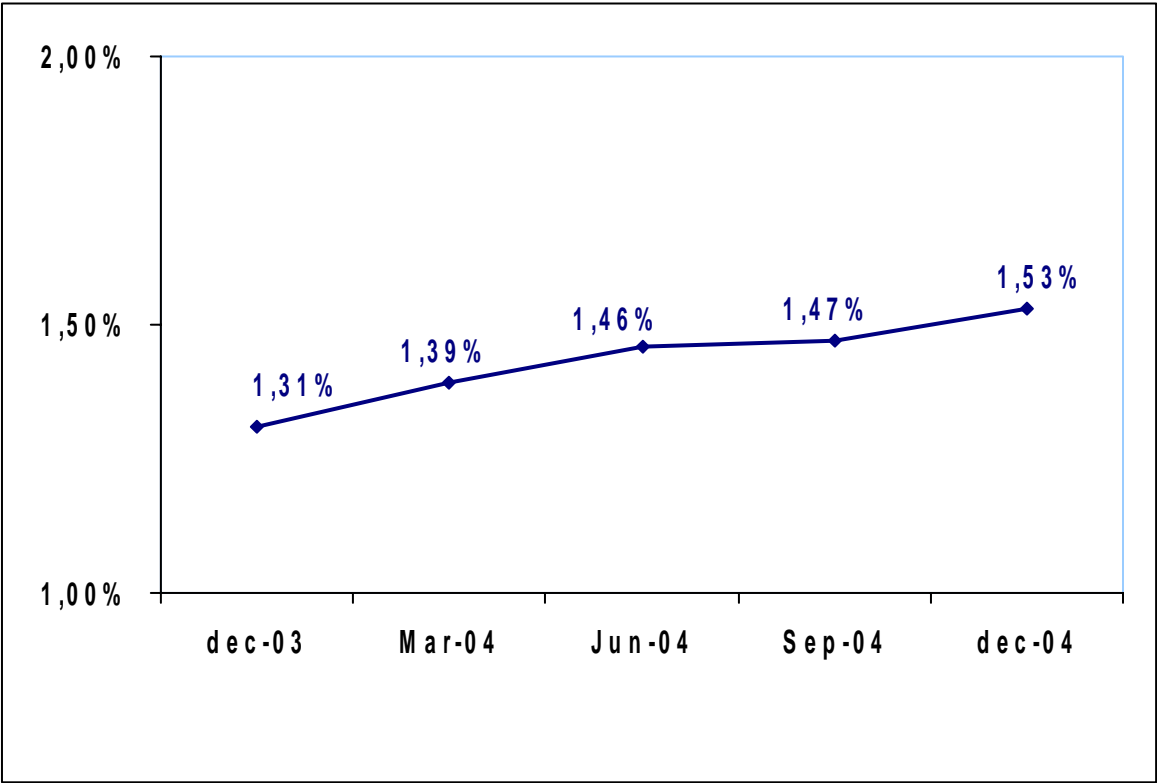


# Post-paid market

Post-paid market size evolution



**Post-paid penetration rate**



**Net ads in the post-paid market**

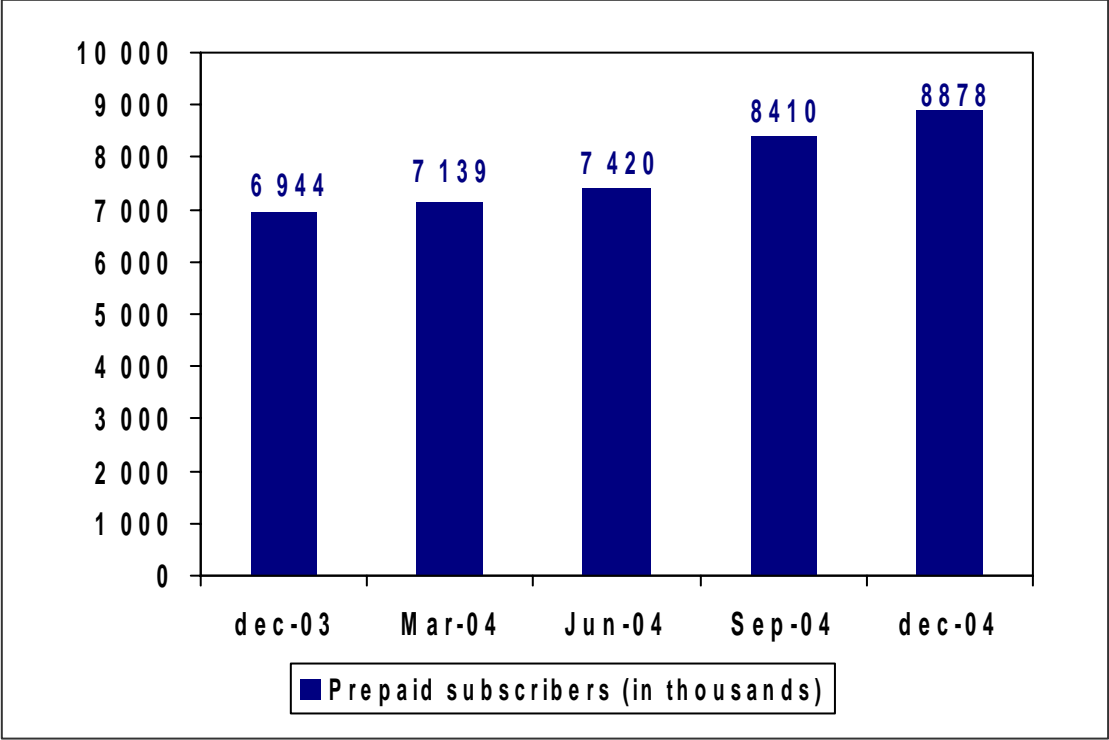
Post-paid Mobile subscribers	Dec-03	Mar-04	jun-04	Sept-04	Dec-04
Net ads <sup>1</sup>	52 511	22 253	19 837	12 681	14 681
% of growth <sup>2</sup>	15,6 %	5,7%	4,8%	2,9%	3,3%

## Prepaid Market

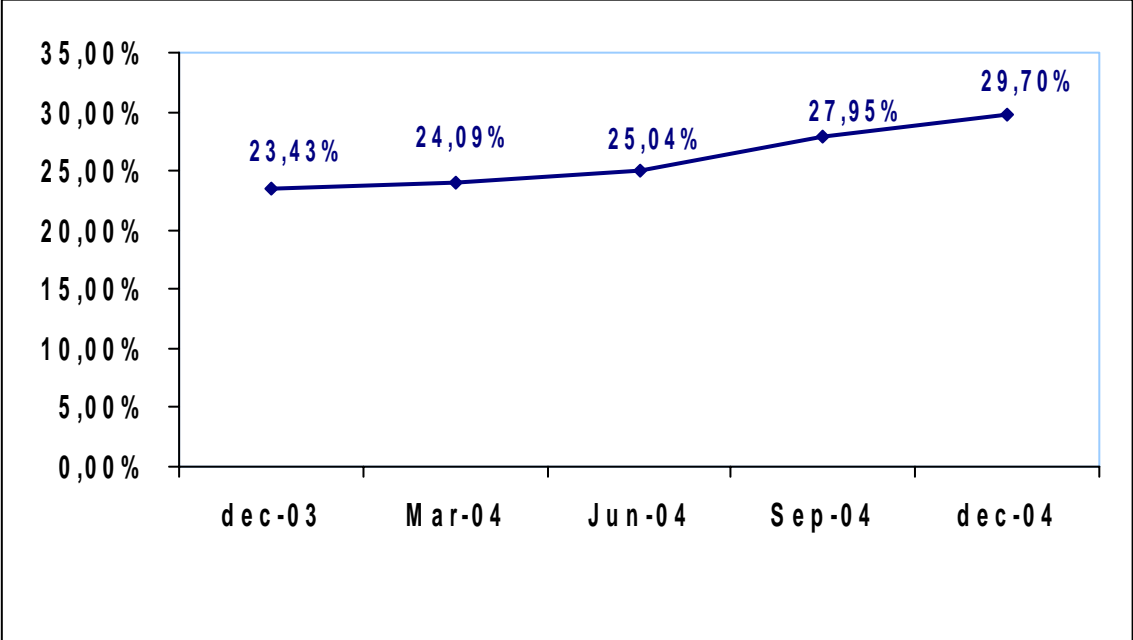
<sup>1</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<sup>2</sup> % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

**Prepaid market size**



**Prepaid penetration rate**



**Prepaid Net ads in the prepaid market**



<b>Prepaid Mobile subscribers</b>	<b>Dec-03</b>	<b>Mar-04</b>	<b>jun-04</b>	<b>Sept-04</b>	<b>Dec-04</b>
<b>Net ads</b>	<b>373 287</b>	<b>195 863</b>	<b>280 851</b>	<b>990 171</b>	<b>467 791</b>
<b>% of growth</b>	<b>5,6 %</b>	<b>2,8%</b>	<b>3,9%</b>	<b>13,34%</b>	<b>5,56%</b>