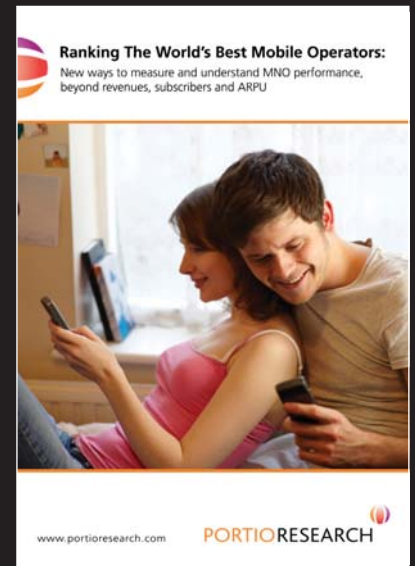


Ranking The World's Best Mobile Operators:

New ways to measure and understand MNO performance, beyond revenues, subscribers and ARPU

**RANKINGS
FOR 204
MAJOR MNOs**



Key features of this essential new study:

- Ground-breaking comparative analysis of world leading MNOs
- Study performance at 204 major MNOs worldwide
- Analyze MNO performance using ten all-new measurements
- Full ranking of 204 MNOs for each performance measurement
- Study 33 MNO case studies outlining strategies used to grow market share and profits
- Learn how to emulate leading MNOs in all world regions
- Identification of 'previously unseen' competitive strengths and weaknesses
- Selected 'traditional' KPIs for MNOs worldwide, their benefits, limitations and comparisons to our new performance indices
- Overall regional rankings in three core areas of success

Ranking The World's Best Mobile Operators:

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Around the world, the market conditions that MNOs face vary considerably, and so like-for-like comparisons of traditional key performance indicators (KPIs) reported by MNOs are not a fair means for evaluating their successes against those of other MNOs in different countries. A previously unavailable level playing field is required to judge the performance of MNOs through the use of suitable performance measurement indices, and this ground-breaking study does exactly that – by evaluating the performance of 204 major MNOs worldwide using ten all-new performance measurement indices (PMIs). These are:

- MNO ARPU (PPP)
- ARPU as a percentage of disposable income
- Revenue growth of the MNO
- MNO Profitability
- MNO growth vs. market growth
- Significance of the MNO
- Successful growth of revenues from data services
- Measuring subscriber loyalty
- Postpaid penetration measure
- Technology measure

These PMIs cover a wide range of performance indicators and include normalising factors. 204 major MNOs worldwide have been ranked on these ten PMIs, and from these results overall rankings have been calculated to truly identify the world's 'best' MNOs.

With high-value practical use, this cutting-edge report provides insight and understanding of MNOs' successes, and an explanation of their strategies for others to emulate. And furthermore it uncovers opportunities for ALL in the mobile space and beyond to capitalise on – not just network operators.

The tough economic climate in 2008 and 2009 has added pressure to the whole mobile industry and the ability to hence isolate how an MNO has become successful in a certain field and then emulate that is a mighty powerful resource.

In this ranking report we continue our work from earlier popular market studies, looking at MNO data services strategies, and further explore MNO success strategies, but this time in a much wider context (not just for data services). Our holistic research stresses that "perfecting the MNO" involves not just the MNO's efforts, but is dependent on their key partnerships and strategic alliances with handset vendors, equipment vendors, and content/application providers. Successes and failures are shared.

So while this report helps MNOs identify competitive strengths and weaknesses, spot areas they need to work on, and offers advice (in the form of 33 case studies) on how to emulate the best in the business in those specific weak areas, it is essential reading for EVERYONE.

Further reasons to buy this research:

- Analysis supported by full methodology and glossary of terms
- Commentary on regional trends, and the differences in social and commercial use of mobility in developed and emerging markets
- Identification of the leading players in the industry and their successful strategies to win, and keep subscribers
- Summary and Conclusion sub-sections using traditional KPIs and our new performance measurements
- Overall Rankings for Best MNOs by Region for: Size and Growth; Extracting Revenues from Subscribers; and Advancing Non-voice Mobile Services

Ranking The World's Best Mobile Operators PORTIO RESEARCH

Introduction

Around the world, the market conditions that MNOs operate in vary considerably depending on different economic and developmental factors. Therefore, key performance indicators reported by the MNOs cannot be taken on their face value for evaluating their performance. A level playing field is required to judge the performance of MNOs through the use of suitable performance measurement indices. This study involves evaluating the performance of MNOs using 10 all-new performance measurement indices. The performance measurement indices used are shown in the figure below.

Figure 1: Performance Measurement Indices Used to Measure the Performance of MNOs Worldwide

The rationale behind the selection of these performance measurement indices has been explained later in the report. These performance measurement indices cover a wide range of performance indicators with the incorporation of normalising factors such as PPP (Purchasing Power Parity), GDP (Gross Domestic Product) growth, population growth, market penetration, number of years of operation, technology employed, etc. MNOs worldwide have been ranked on these 10 performance measurement indices and an overall ranking has been done to compare the ranking of 204 major mobile network operators worldwide using the devised performance measurement index. The study also includes a brief analysis of the strategies adopted by the MNOs that secured a high rank in the list computed for each performance measurement index.

Standard KPIs

In this report we have taken a different approach and normalised each performance measurement index to create a level playing field for MNOs in order to eliminate the undue advantage gained by certain MNOs because of varying market environment. However, the industry practice is to evaluate these operators on the basis of the following three KPIs:

- Subscriber Base

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Ranking The World's Best Mobile Operators PORTIO RESEARCH

Purchasing Power Parity – the normalising factor used in this index to compare MNOs worldwide – when multiplied with real ARPU, scales the ARPU values for MNOs operating on the PPP of the market of operation.

An operator might be ahead of the competition by different approaches – such as focus on pushing data services, attracting subscribers to opt for postpaid plans, subsidising handsets to enable YAS uptake, targeting enterprise segment, network upgrade to create new opportunities of revenue generation. Whether an MNO is operating in developed or an emerging market, the operator ranking high in this performance measurement index are the ones who have succeeded with their offerings to suit the market requirements. Therefore, it might be worth looking at their strategies.

Figure below shows the Top 20 MNOs based on this performance measurement index.

Figure 3: Top 20 MNOs – MNO ARPU PPP (2008)

The rankings of MNOs based on this performance measurement index are given below:

Note: The scores were calculated to two decimal places with each MNO getting a distinct value. Due to rounding off to one decimal place a few MNOs appear to secure the same score.

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3 The UK

Ownership: Hutchison (Singapore) Limited

Launched: 2003

Subscriber Base: 4.8 million (31st December 2008)

ARPU (USD): 14.2 (Monthly, 2008)

ARPU PPP (USD): 9.2 (Monthly, 2008)

Market Share: 8.4 percent (31st December 2008)

The UK Mobile Population: 125.6 million (31st December 2008)

Technology: WCDMA

Market Environment – The UK:

- One of the largest mobile markets in Europe with nearly 78.4 subscribers at end-2008
- The UK is a highly competitive wireless market and is approaching saturation
- Market is dominated by four big players namely – O2, Vodafone, T-Mobile and Orange
- World's most successful MNO, Virgin Mobile is based in The UK
- 3G networks launched by few MNOs
- Competition has led to lowering of voice as well as data plan prices and promotion of bundled packages

The figure below shows the ARPU and ARPU PPP of MNOs in The UK.

Figure 7: MNOs' ARPU and ARPU PPP – The UK (in USD, 2008)

3's Strategies

3 The UK was the first to launch 3G networks in various countries worldwide and The UK is one of them. The company bought the largest 3G license reserved for any new entrant in The UK and started its operations in March 2003. Since then it has offered several executive and marketing services to its subscribers over its high speed network.

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Please note that each Performance Measurement chapter contains:

- Formula and Rationale
- Rankings
- Three case studies on MNO Strategies (PM 2 has four case studies)

OTHER LEADING MNO PROFILES

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