MoMo DUS @ SHA
The German Mobile Market

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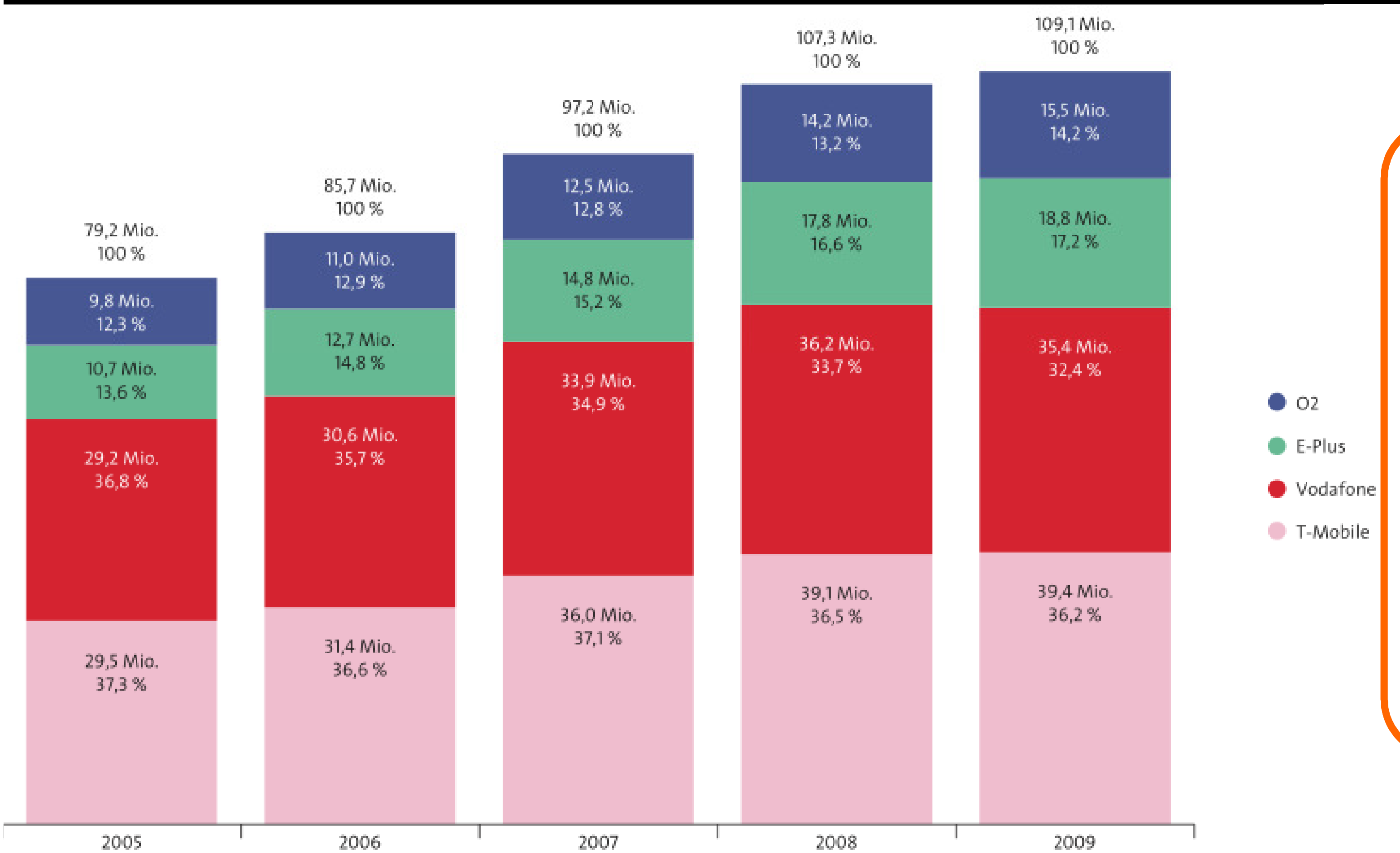
MoMo Germany Success-Story

- Presence in Düsseldorf (12/06), Munich (02/07), Frankfurt (10/07), Berlin (02/08), Hamburg (06/08)
- 1 Website, 1 Board, 1 Look & Feel – 100% sponsored!
- Ran over 100 events in the past years (up to 25 p.a.)
- Regular communication with over 3.000 followers
- Participation at international MoMo platforms...
  - 10th anniversary of MoMo, Helsinki/Talinn, Sep 2010
  - Mobile Premier Award at MWC, Barcelona, Feb 2011
- Established National Summit (2010: Nov 29th, Berlin)
  - incl. III. Kudos Award as App Circus
- Successful Brand Extension with m2d2
  - Ran Developer Days for Android and Apple OS

German Market Trends

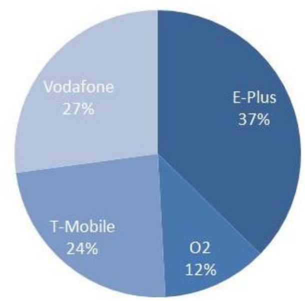
- Every year approx. 28 mill. new devices are sold (30% are Smartphones)
  - Brands in use (%): Nokia 40, SE 19, Samsung 17, Moto 5, Apple 3, LG 2, RIM 1, HTC 1
  - Brands sold in Q4 2009 (%): Samsung 36, Nokia 29 (!)
- Growth engine in Non-Voice-ARPU: Mobile Internet
  - But still only 10% of Mobile User go regularly online (iPhone user: 100%)
- SPs consolidated: mobilcom debitel (Freenet), Drillisch, The Phone House
- Since 1st MVNO hit Germany in 2004 enormous segmentation took place
  - All 4 MNOs launched own “no frills” offers
    - T-Mobile: congstar
    - Vodafone: o.tel.o
    - O2: FONIC
    - E-Plus: simyo
  - 5 MVNEs established
  - 140 MVNOs more or less establish
    - SIM only, Branded Reseller, Pure Data, Free Mobile Portal + SIM, …

Market Share per activated SIM
(market saturation: 133%)



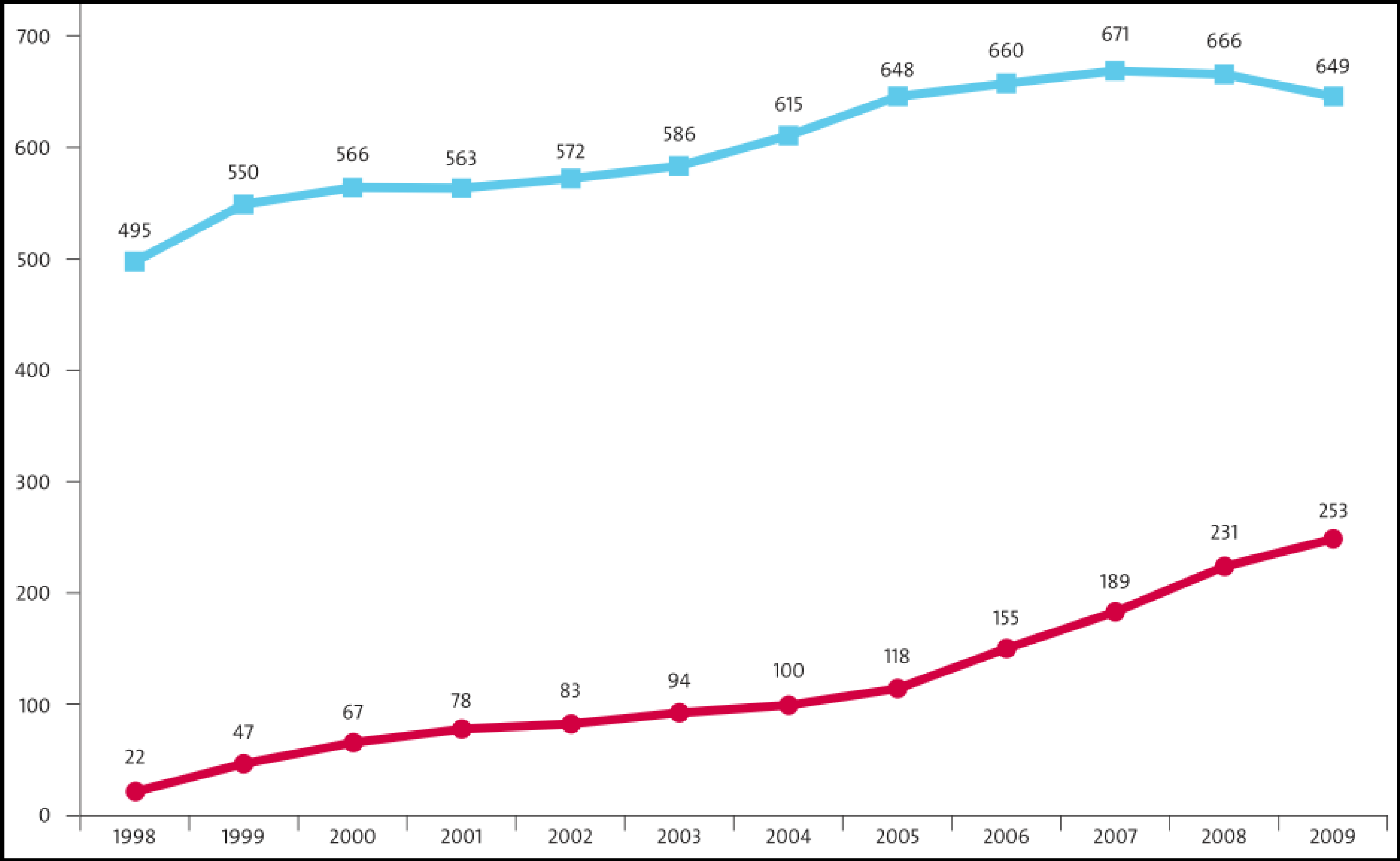
SP/MVNO
Market Share:
~ 30%

... based on these MNOs:



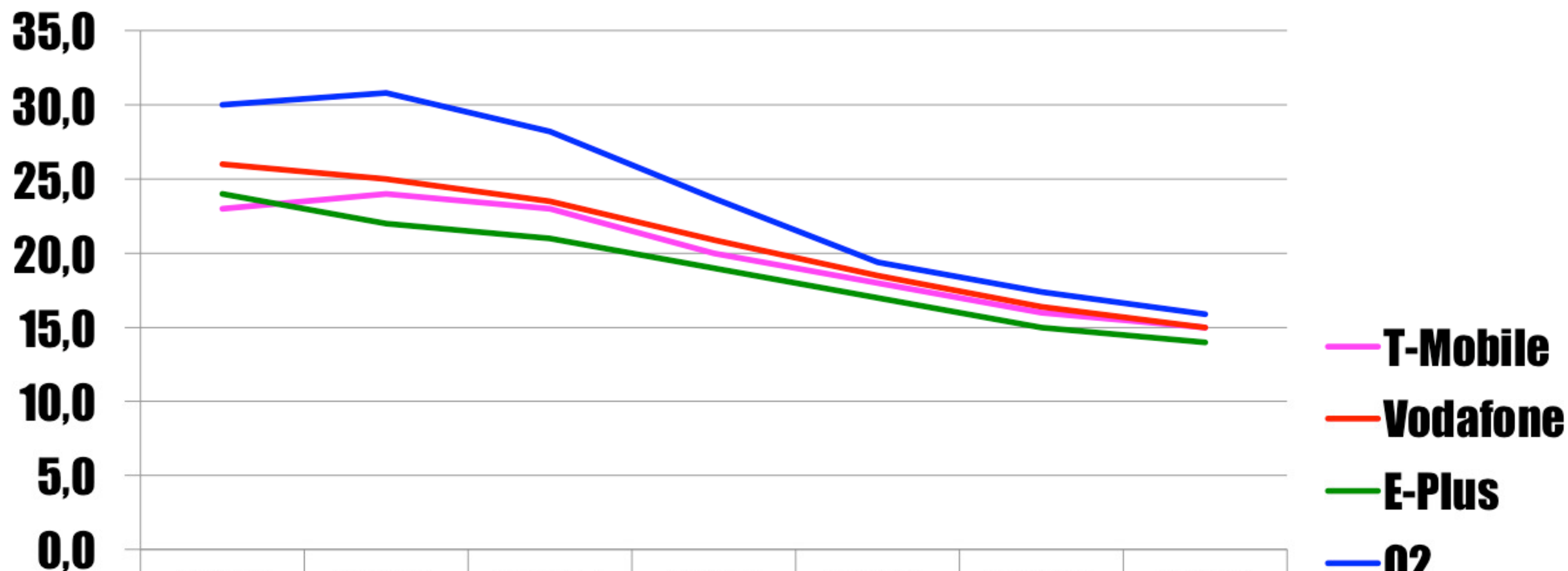
MOU outbound / day (in million)

Fixed   Wireless (28%)



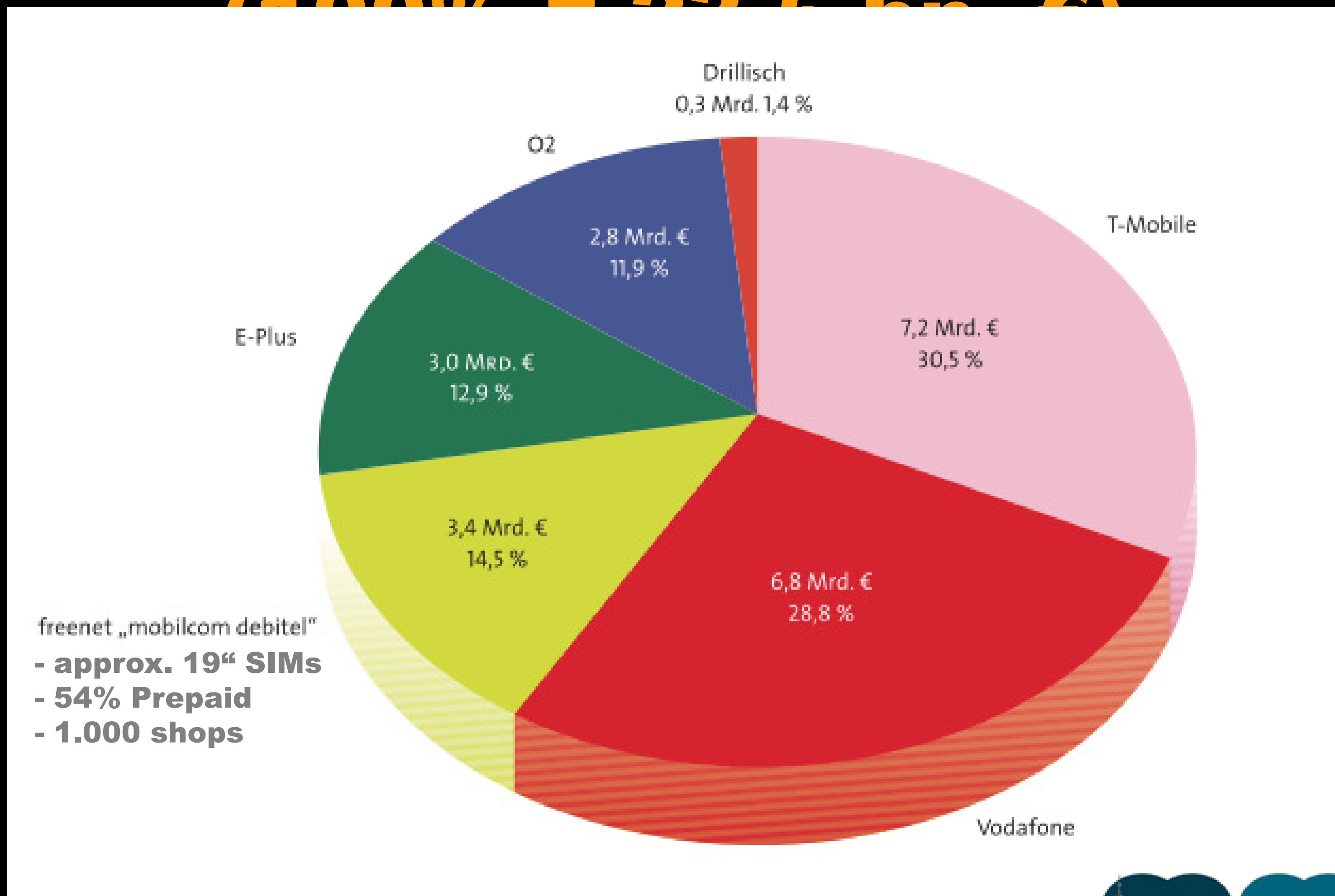
Blended ARPU Development in €

55% Prepaid



	2003	2004	2005	2006	2007	2008	2009
T-Mobile	23,0	24,0	23,0	20,0	18,0	16,0	15,0
Vodafone	26,0	25,0	23,5	20,9	18,5	16,4	15,0
E-Plus	24,0	22,0	21,0	19,0	17,0	15,0	14,0
02	30,0	30,8	28,2	23,7	19,4	17,4	15,9

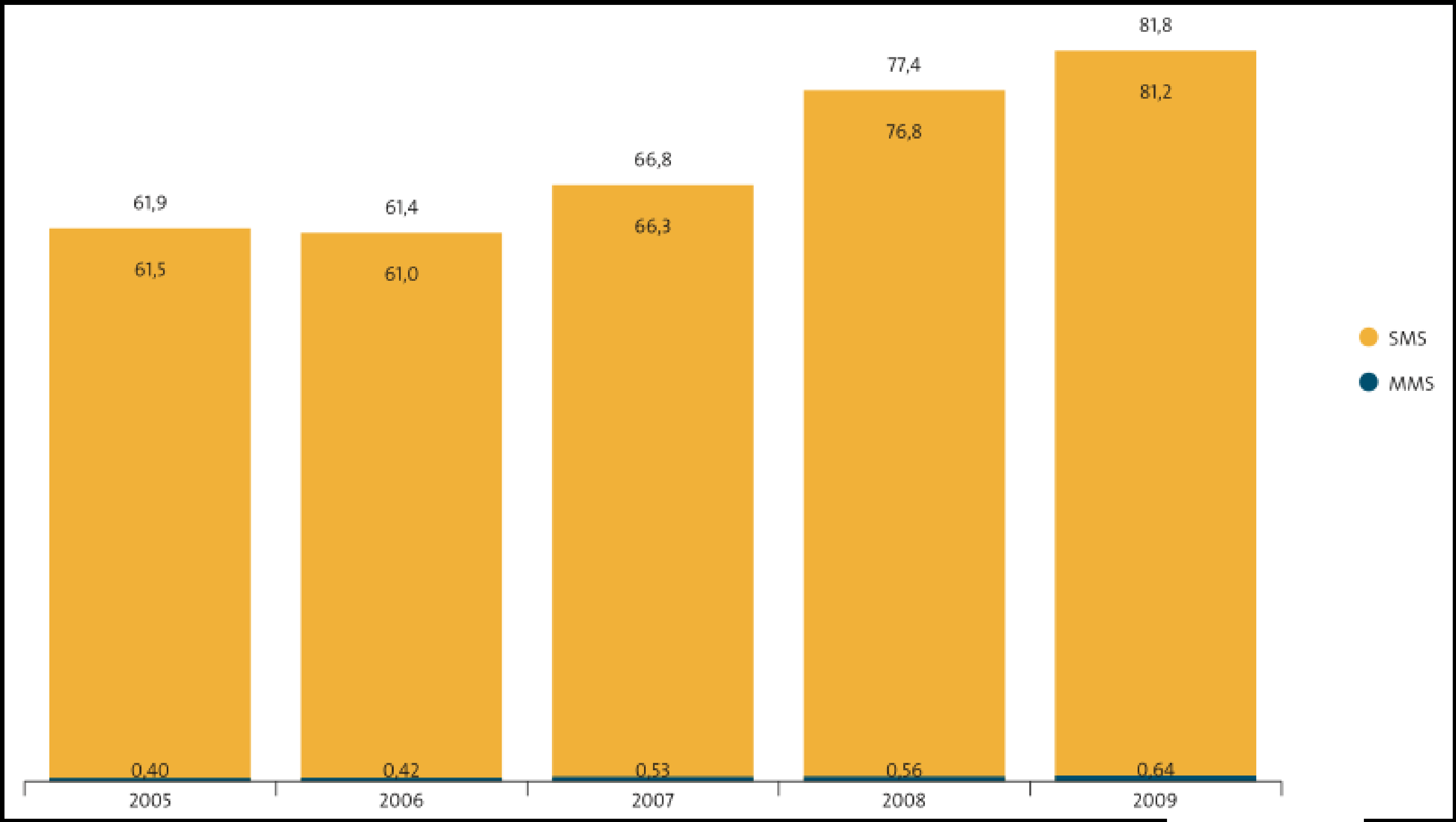
Market Share per Revenue
incl. SPs
(100% = 23,5 bn. €)



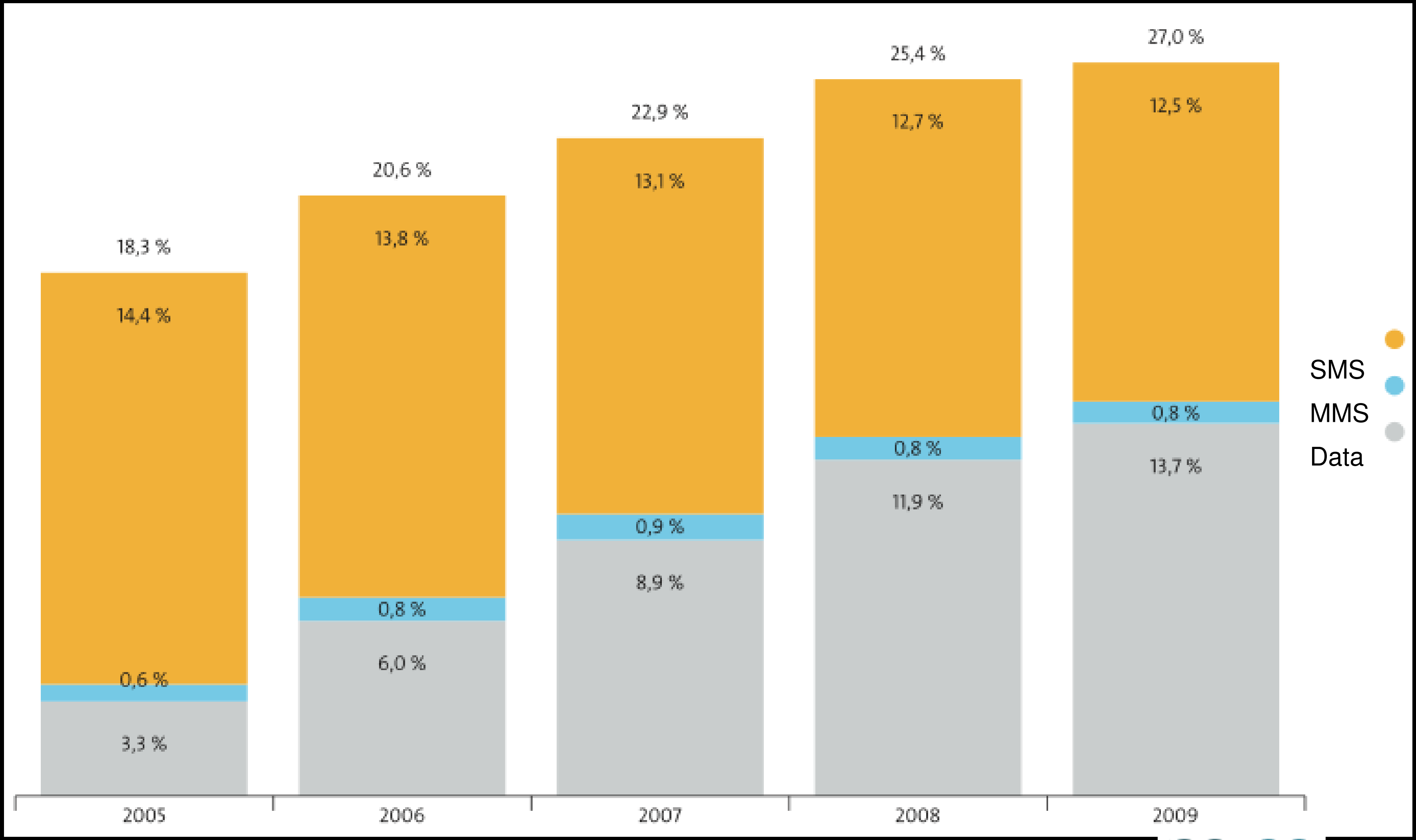
Mill. Messages/day x all networks

ø 1 SMS / inhabitant / day

~ 30 bn. SMS / year



Non-SMS Data is driver for growth in Non-Voice-ARPU



Düsseldorf / DUS
The Mobile Capital of Europe

- > 50% of all SIMs distributed out of DUS
  - E-Plus, Vodafone
- > 50% of all Devices sold out of DUS
  - LG, Nokia, RIM, Sony Ericsson
- Infrastructure Giants choose DUS as hub
  - Ericsson, Huawei, NSN, ZTE
- DUS as initial point of important pilots
  - LTE, NFC/RFID, Future Store
- Excellent climate for SMEs and Start-Ups
  - „Where Business meets Lifestyle“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MOBILE CAPITAL
DÜSSELDORF

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