Femtocell Strategies:
Global Service Provider Survey

December 11, 2009

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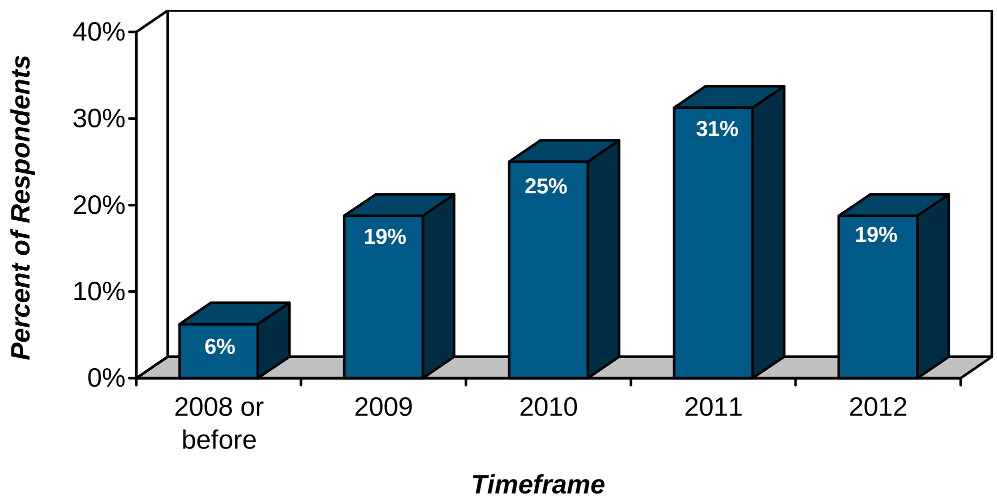
METHODOLOGY AND DEMOGRAPHICS

Over 50% of respondents launch femtocells in next 2 years

We interviewed 16 service providers from October through November 2009. To qualify, respondents must offer a commercial femtocell service or plan to by the end of 2012.

The chart below addresses the question, "When do you expect to have a commercial femto service?"

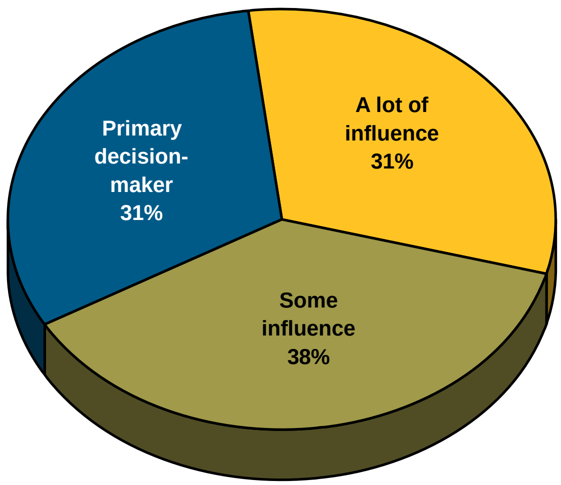
Exhibit 1 **Commercial Femtocell Service Launches**
n=16



Respondents have strong purchase influence

To participate in the survey, all respondents must have detailed knowledge of their company's femtocell strategy. Respondents also must have at least some influence in the purchase decision. The majority of respondents (62%) are the primary decision-maker, or have a lot of influence. This is a key part of the screening process to ensure that we're talking to knowledgeable decision-makers in the buying process.

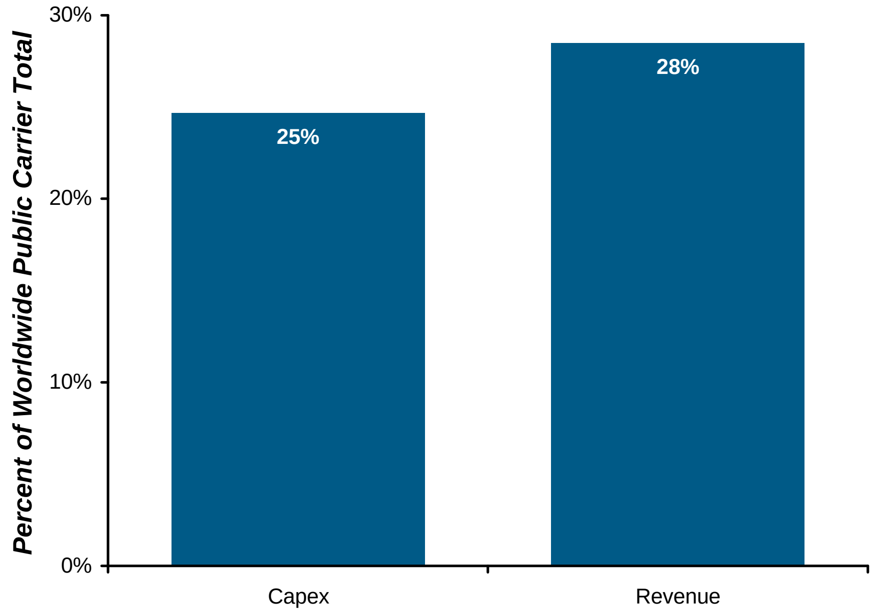
Exhibit 2 **Respondents Have Strong Purchase Influence**
n=16



Respondents account for 25% of worldwide telecom capex and 28% of revenue

This is significant and reflects the fact that we have captured some of the world's largest service providers, ranked by revenue. Getting to that level of capex, and to 28% of total revenue worldwide with such a small sample indicates we have managed to interview some of the world's largest service providers by revenue.

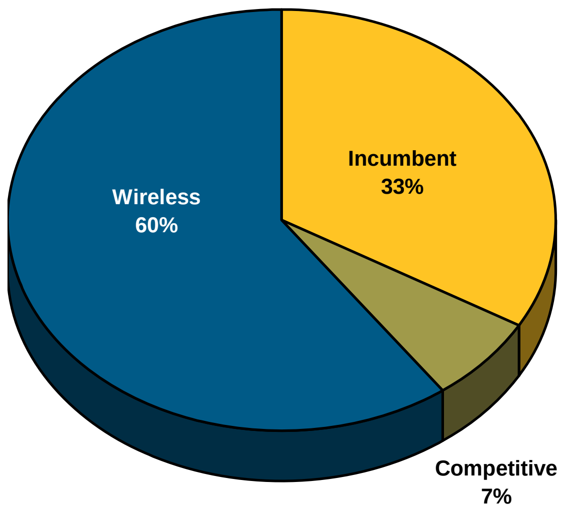
Exhibit 3 **Capex and Revenue Represented by Respondents**
n=16



Respondents include a bias toward mobile-only operators . . .

All respondents currently operate mobile networks, either 3GPP (GSM/EDGE, W-CDMA/HSPA), 3GPP2 (CDMA/EV-DO) or WiMAX (802.16d/802.16e), or a combination of several of these. Sixty percent are wireless pure-play operators, having no fixed-line networks, 33% are former government-owned incumbent operators, with an integrated fixed-line network, and 7% (one respondent) is a non-incumbent competitive operator, with both fixed and mobile networks.

Exhibit 4 **Respondent Service Provider Types**
n=16



The strongest early markets for femtocells are in developed countries, as 3G rollout is more pervasive, and Infonetics believes that 3G femtocells have stronger adoption benefits for consumers, because it suffers from poorer in-building penetration as compared to 2G. We deliberately targeted 3G operators for this survey.

. . . and toward EMEA, set to be a major region for femtocell action

Our survey is slightly skewed toward EMEA, with 50% of respondents coming from that region, though they are spread across the whole region. Although our study reflects the concentration of 3G operators actively and publicly pursuing femtocell strategies in Western Europe, respondents from Africa and Eastern Europe are also included.

Currently there is a smaller pool of active operators in North America and CALA, hence each region represents as.

Exhibit 5 **Regional Distribution of Respondents n=16**