Mobile Infrastructure Vendor Ratings and Product Features: Global Service Provider Survey

October 7, 2009

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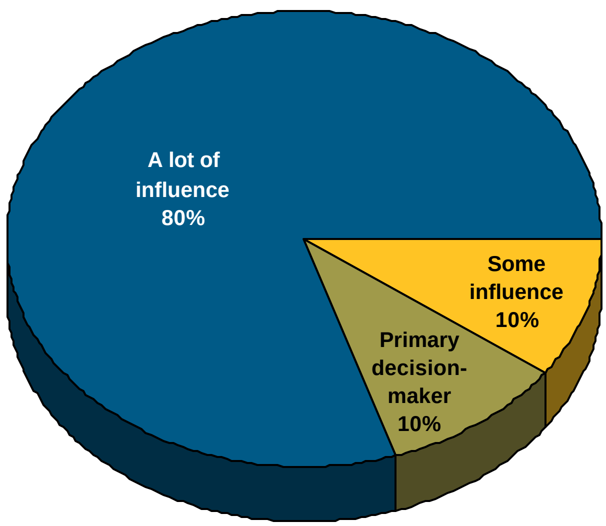
METHODOLOGY AND DEMOGRAPHICS

In July through September 2009, 10 service providers responded to our online survey. To qualify, respondent organizations must currently operate a wireless network, and respondents must have detailed knowledge of their companies' mobile infrastructure equipment.

80% of respondents have a lot of influence in the purchase decision

Respondents are also required the have at least some influence in the purchase decision. The majority of respondents (90%) are the primary decision-maker or have a lot of influence. This is a key part of the screening process because it ensures that we're talking to people who are a key part of the buying process.

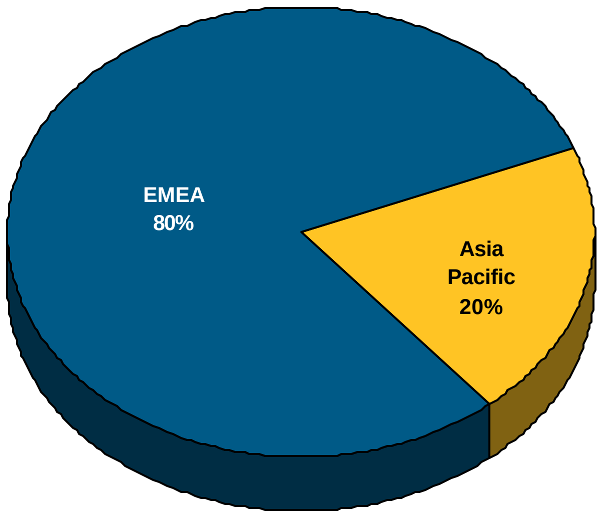
Exhibit 1 **Respondent Influence**
n=10



80% of respondents come from EMEA, the rest from Asia Pacific

None of the North American players took the survey. There are three main reasons for that. First, there are not many significantly sized mobile operators left in North America: Verizon Wireless, AT&T Mobility, Sprint, T-Mobile USA, Bell Canada, Telus, and Rogers Wireless (listed in order of highest to lowest revenue). Second, all of them but T-Mobile are in the process of selecting LTE vendors and quickly declined the survey. Third, smaller operators such as Centennial Wireless, CenturyTel, Leap Wireless, MetroPCS, and US Cellular declined also, claiming they had limited resources for this effort.

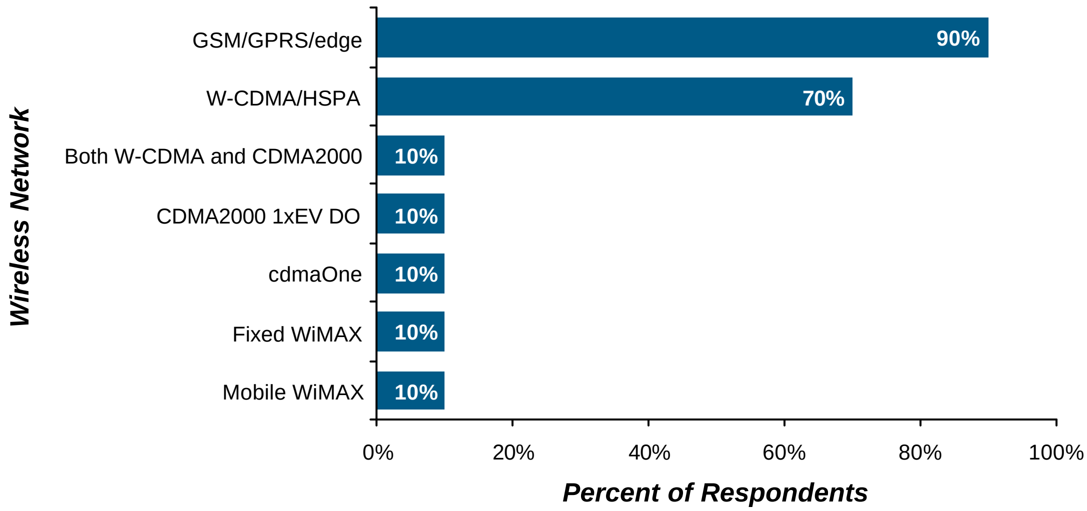
Exhibit 2 **Regional Distribution of Respondents**
n=10



As a result, 90% of respondents have GSM/GPRS/EDGE networks

Although we targeted a large spectrum of mobile operators, the heavy EMEA representation in our sample leads to there being an overwhelming majority of GSM operators, which in turn leads to 70% of them being from the 3GPP camp. Twenty percent of respondents are from the 3GPP2 camp, and a few of them also operate fixed WiMAX and mobile WiMAX networks. Typically, a large global operator such as Vodafone may roll out and operate WiMAX networks in greenfield operations. The CDMA operators are from Asia Pacific.

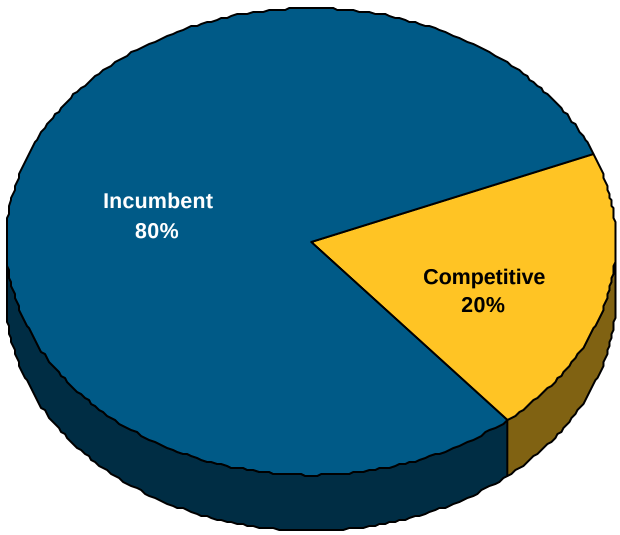
Exhibit 3 **Wireless Networks Deployed**
n=10



80% of respondents come from large incumbent operators

This is again a result of the EMEA club because everywhere you go across EMEA, large incumbents from western Europe have a presence through subsidiaries or stakes.

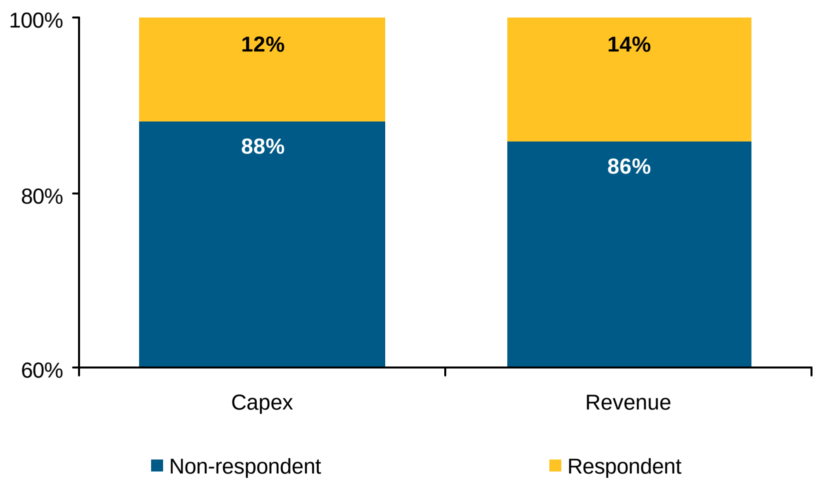
Exhibit 4 **Respondent Service Provider Types**
n=10



We have captured 14% of worldwide revenue and 12% of capex

The respondents in this study represent 14% of worldwide revenue and 12% of capex in our *Service Provider Capex, Opex, ARPU, and Subscribers* report. These numbers are lower than they would be if large North America Tier 1 and Tier 2 service providers were among our respondents (as mentioned above, almost all of them are in the process of selecting vendors for current infrastructure upgrades and LTE and declined to participate).

Exhibit 5 Respondents Represent 12% of 2008 Service Provider Capex and 14% of Revenue n=10



Source: Service Provider Capex, Opex, ARPU, and Subscribers By-Provider Actuals and Short-Term Forecast, Worldwide, 8/25/09