

Marketplace Update

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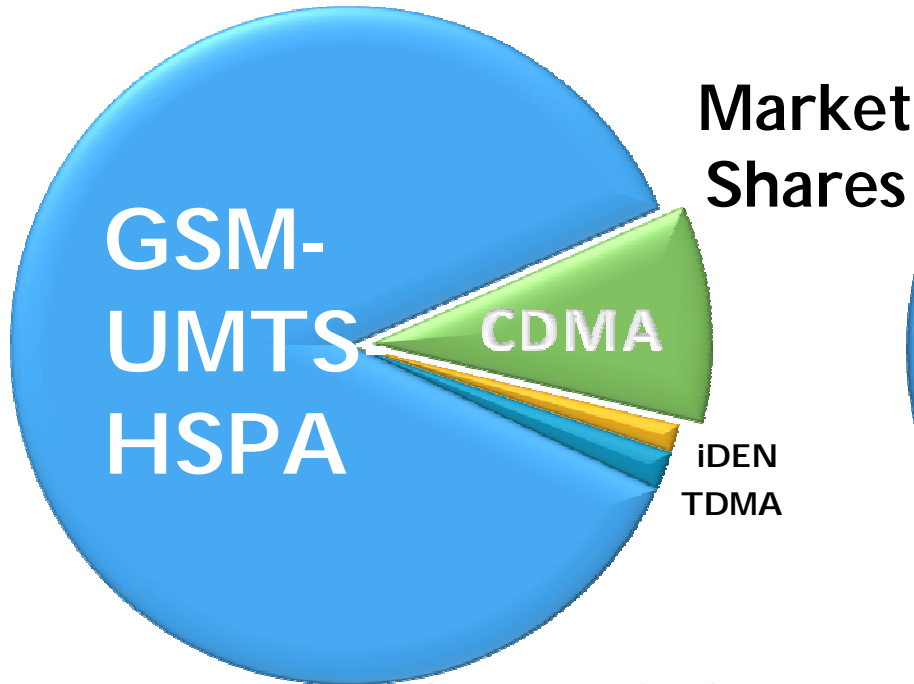
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Some Latin America indicators end 2009

- **Wireless users:** **509 million**
- **Mobile penetration:** **86%**
- **Prepaid market share:** **83%**
- **Average ARPU:** **US \$ 14**
- **Data as % of service revenues in Q3 2009:** **17% (28% in US)**

Latin American Wireless Technology Market Shares

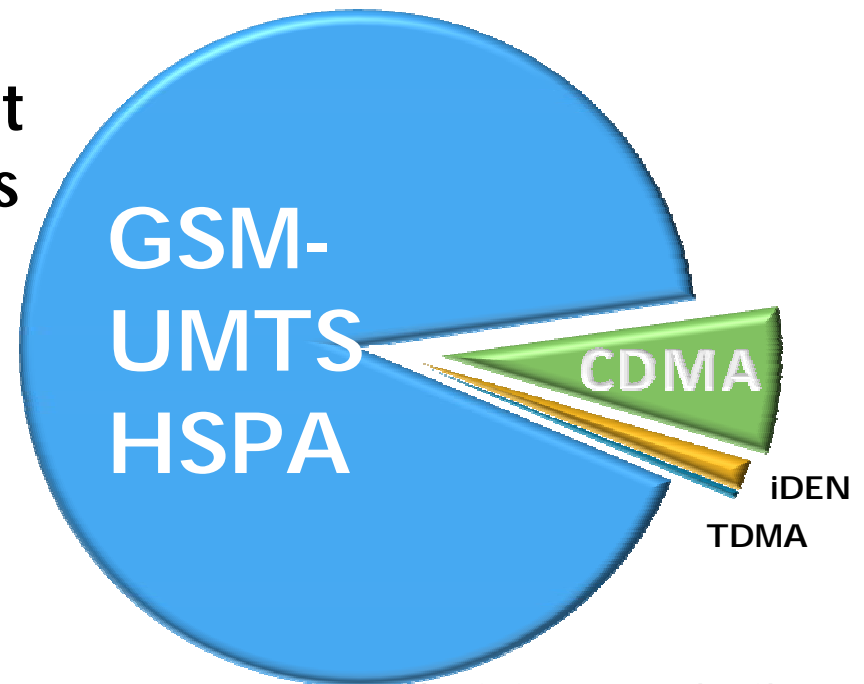
December 2008



Subscriptions Market Share

GSM-UMTS-HSPA	400 M	88%
CDMA	42 M	9%
iDEN	6 M	1%
TDMA	6 M	1%

December 2009

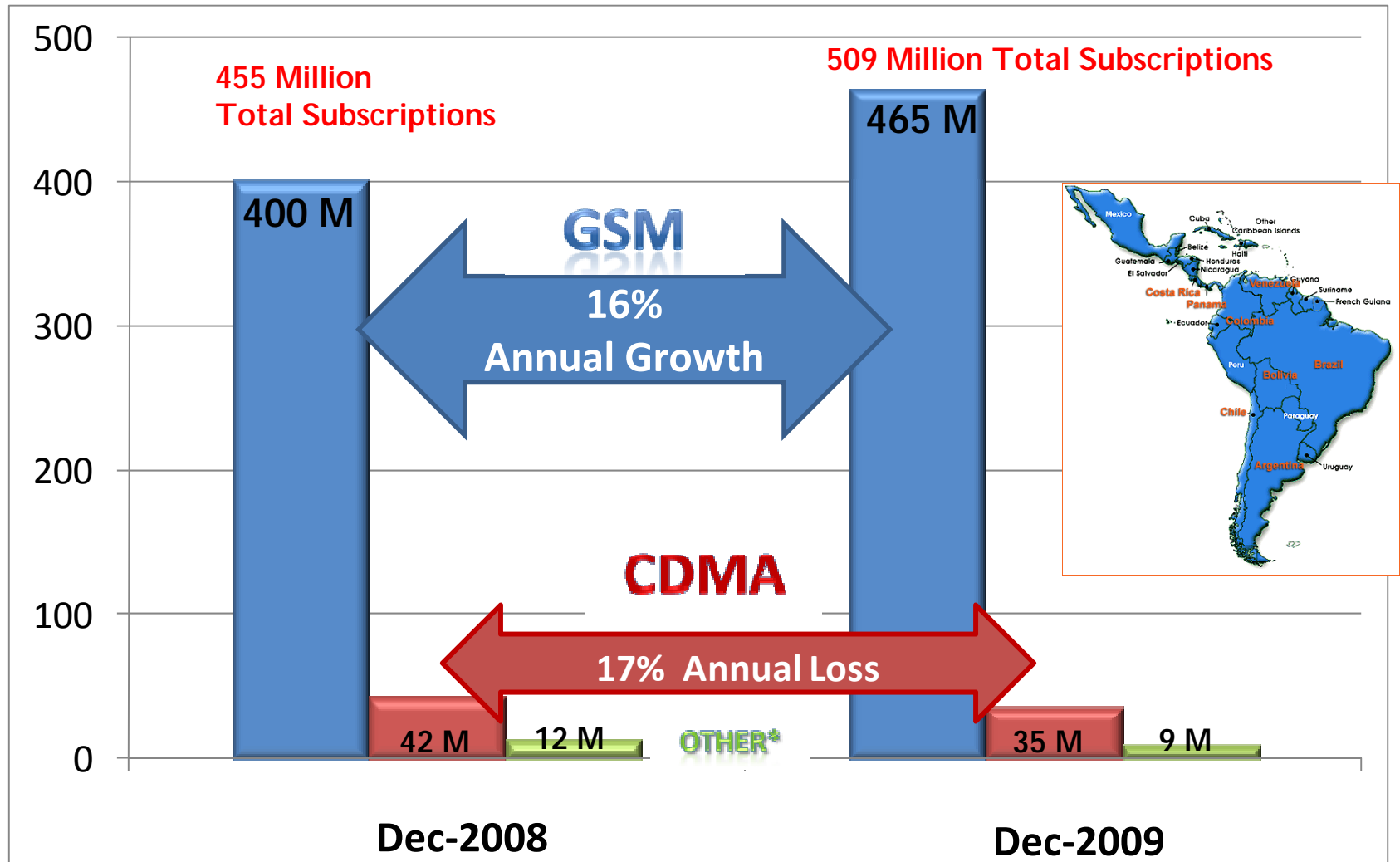


Subscriptions Market Share

GSM-UMTS-HSPA	465 M	91%
CDMA	35 M	7%
iDEN	7 M	1%
TDMA	2 M	0%

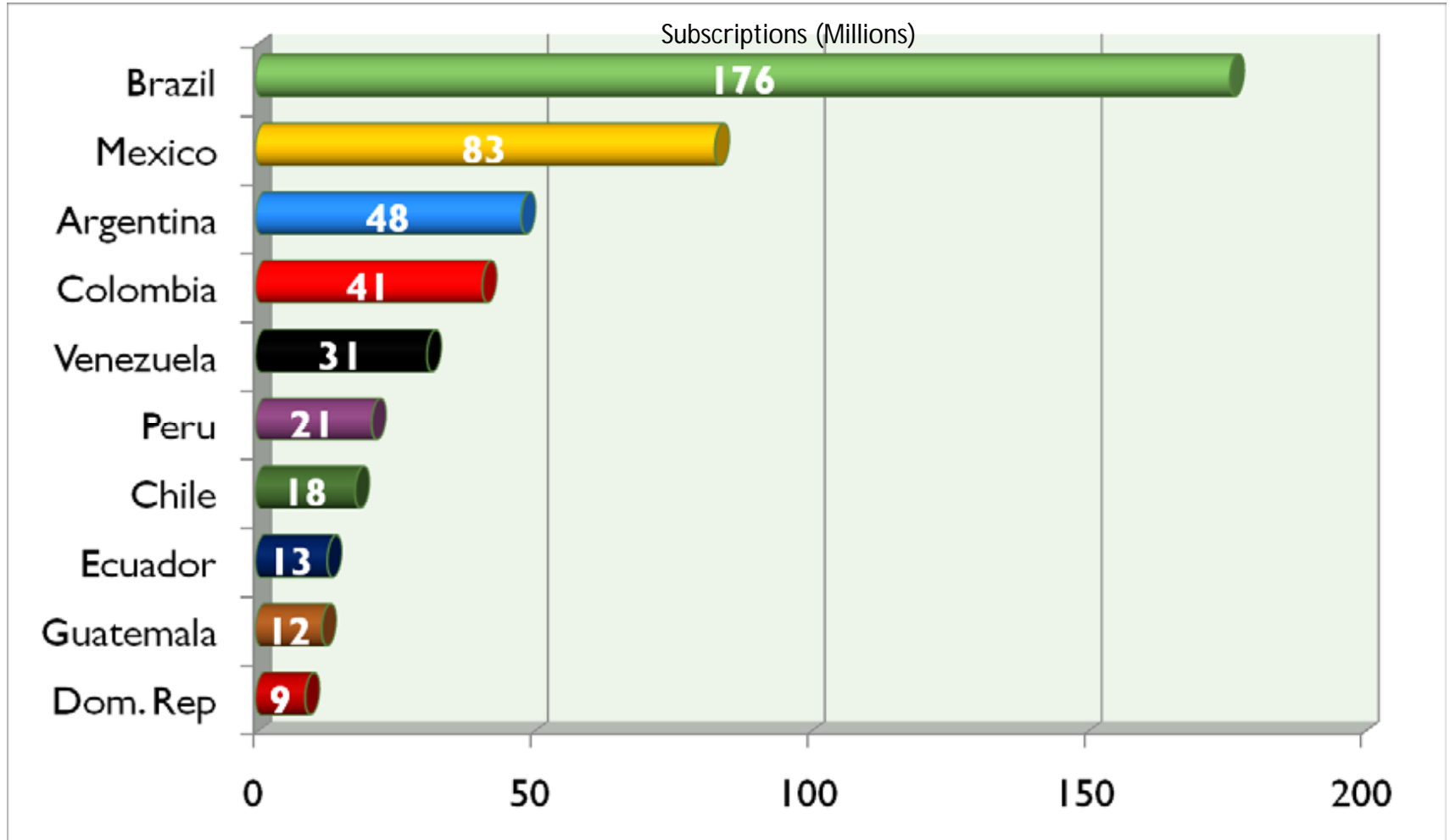
Latin American Wireless Technology Growth

Subscriptions (Millions)



*Other Includes iDEN and TDMA

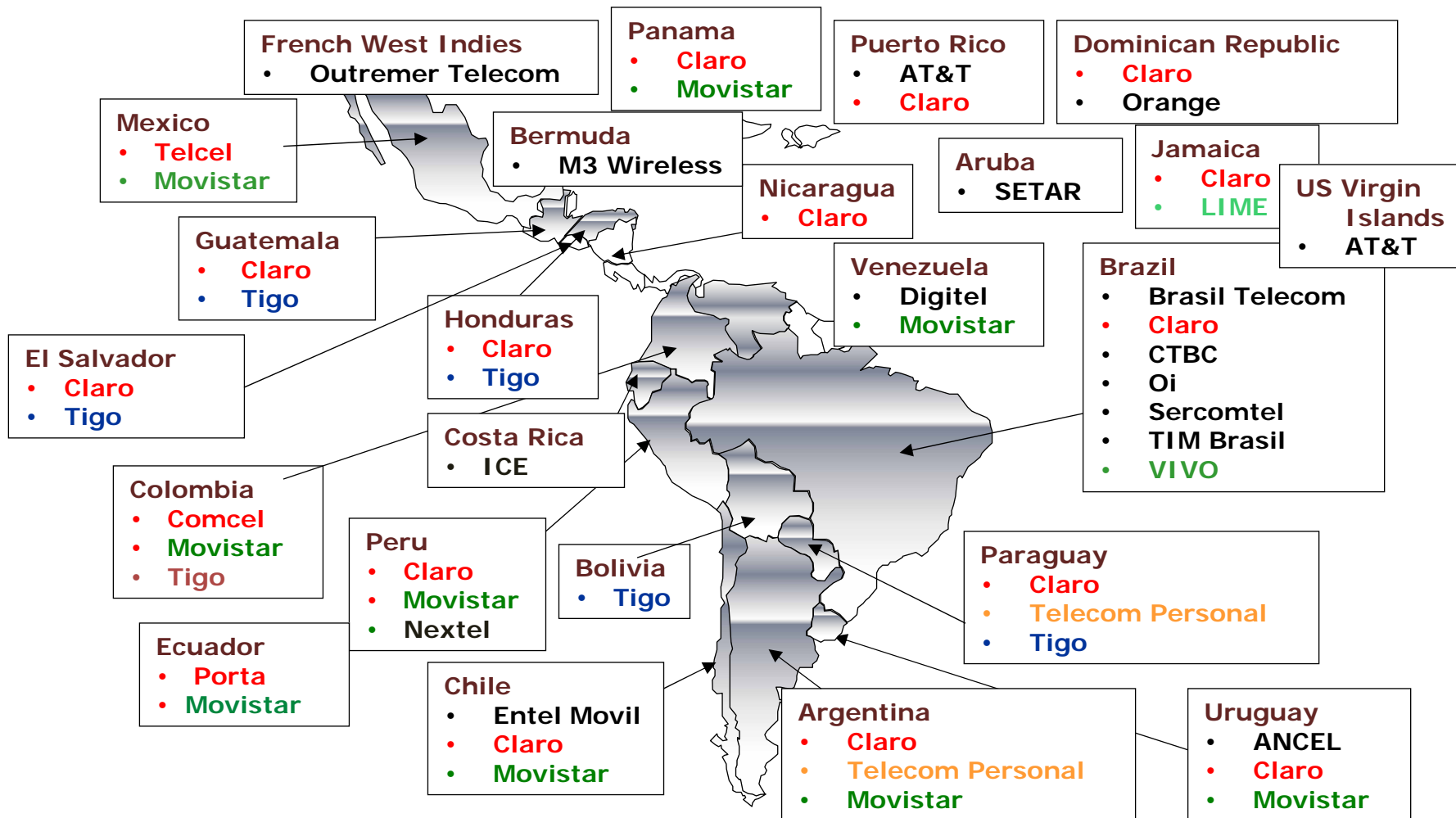
Top Ten Wireless Markets in Latin America End 2009





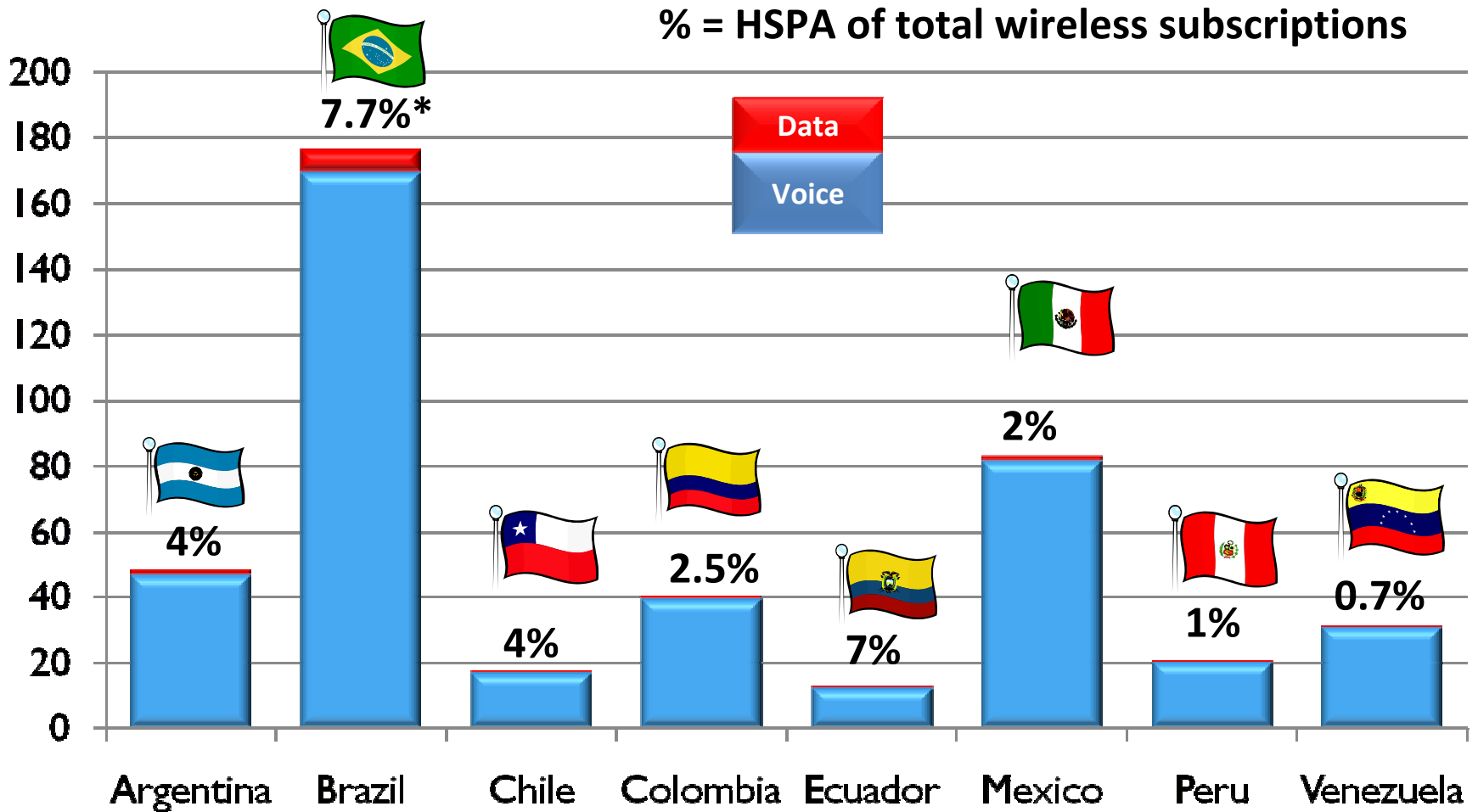
HSPA in Latin America & Caribbean

52 networks in service in 24 countries



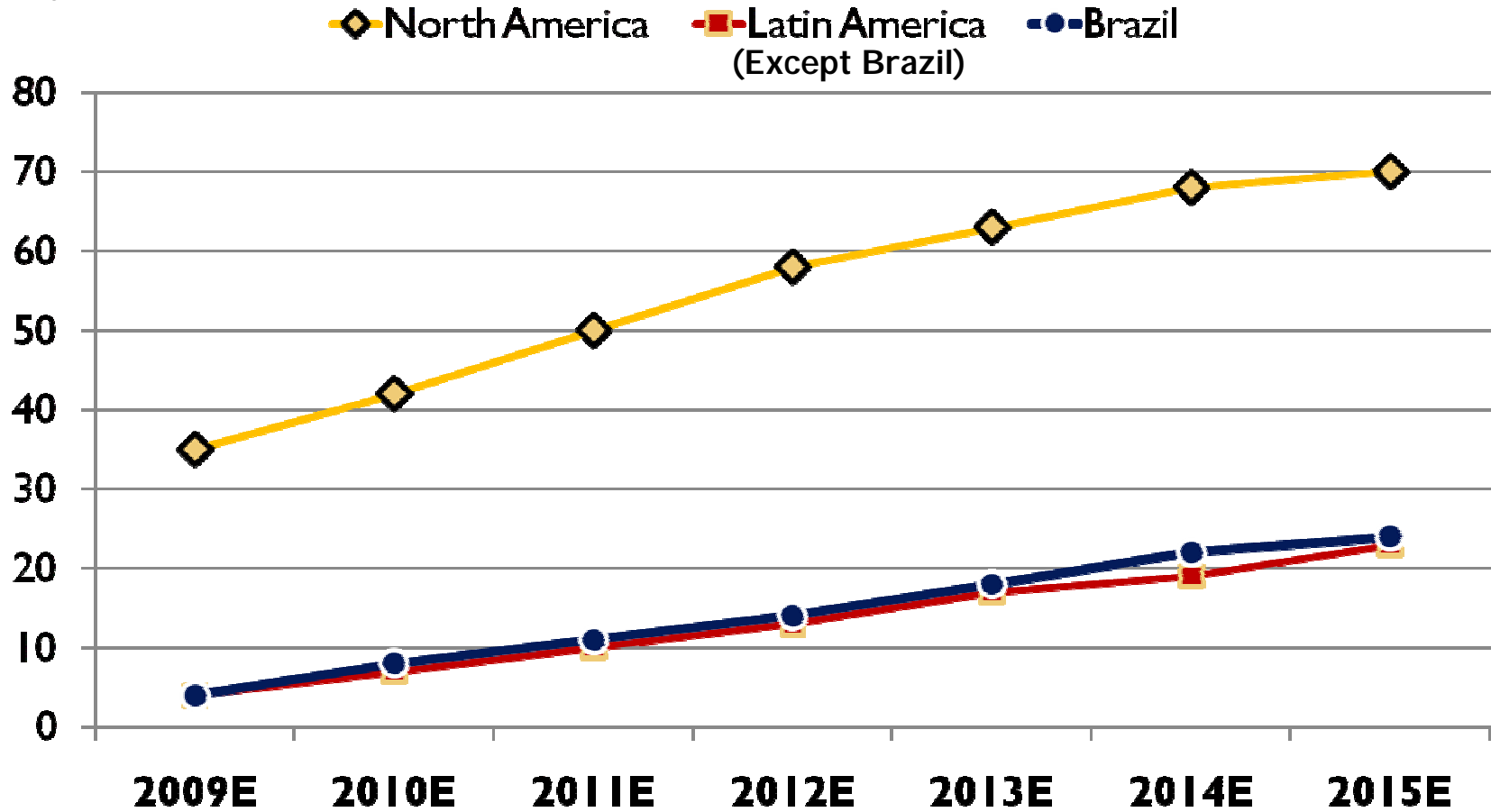
Voice vs Data in Select Latin Markets

Subscriptions (Millions)

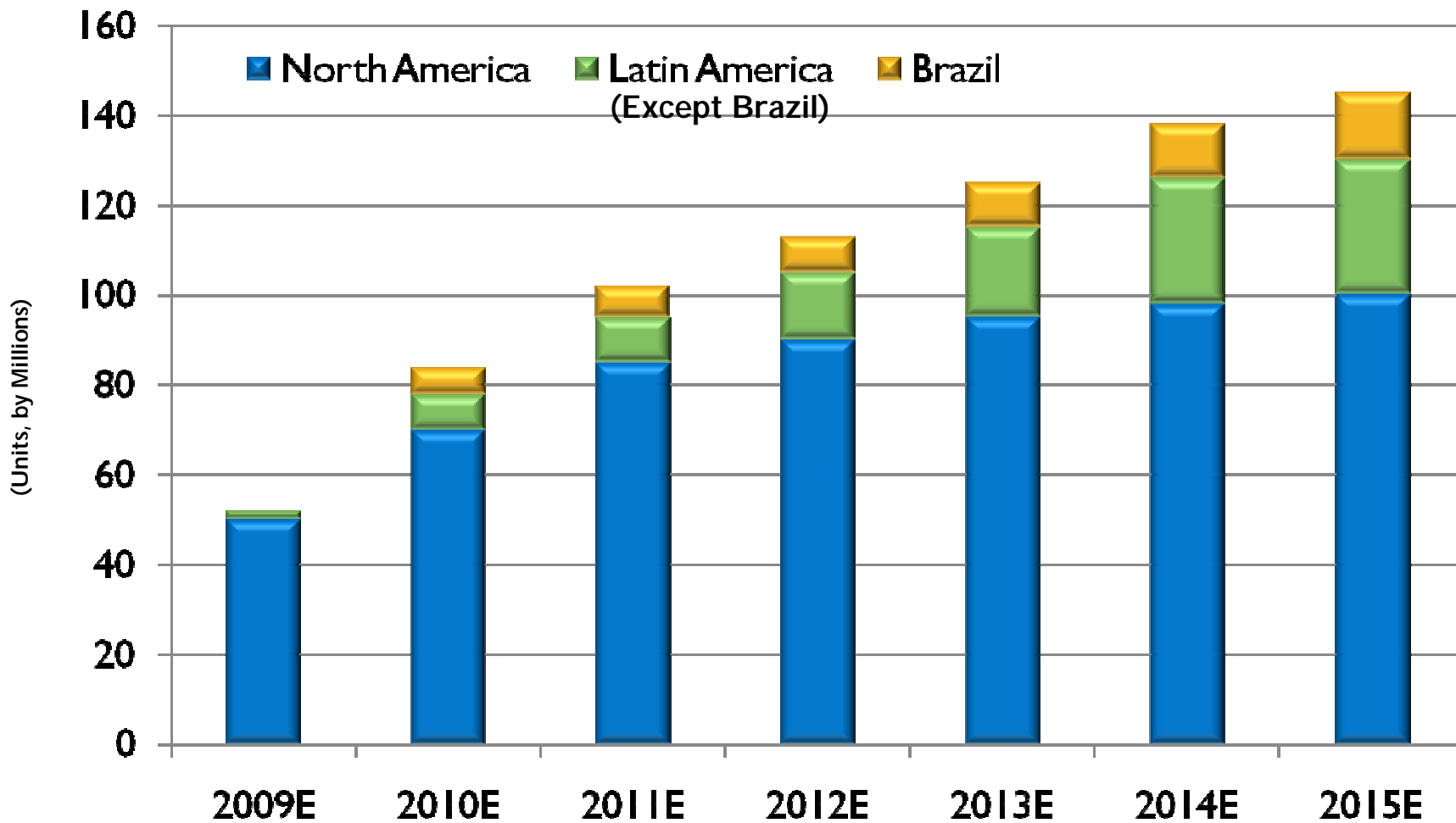


Smartphone Penetration Forecast

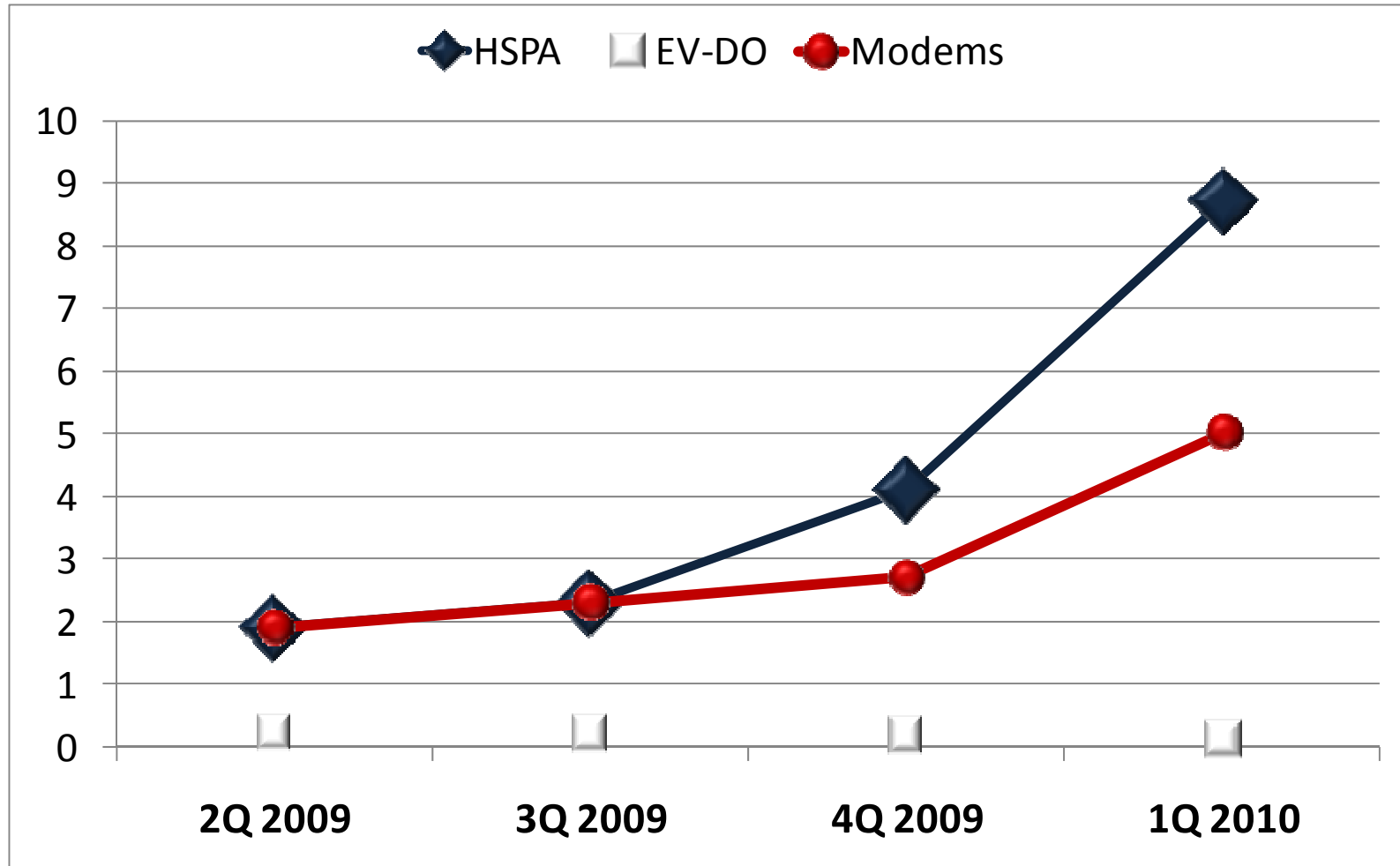
Percentage



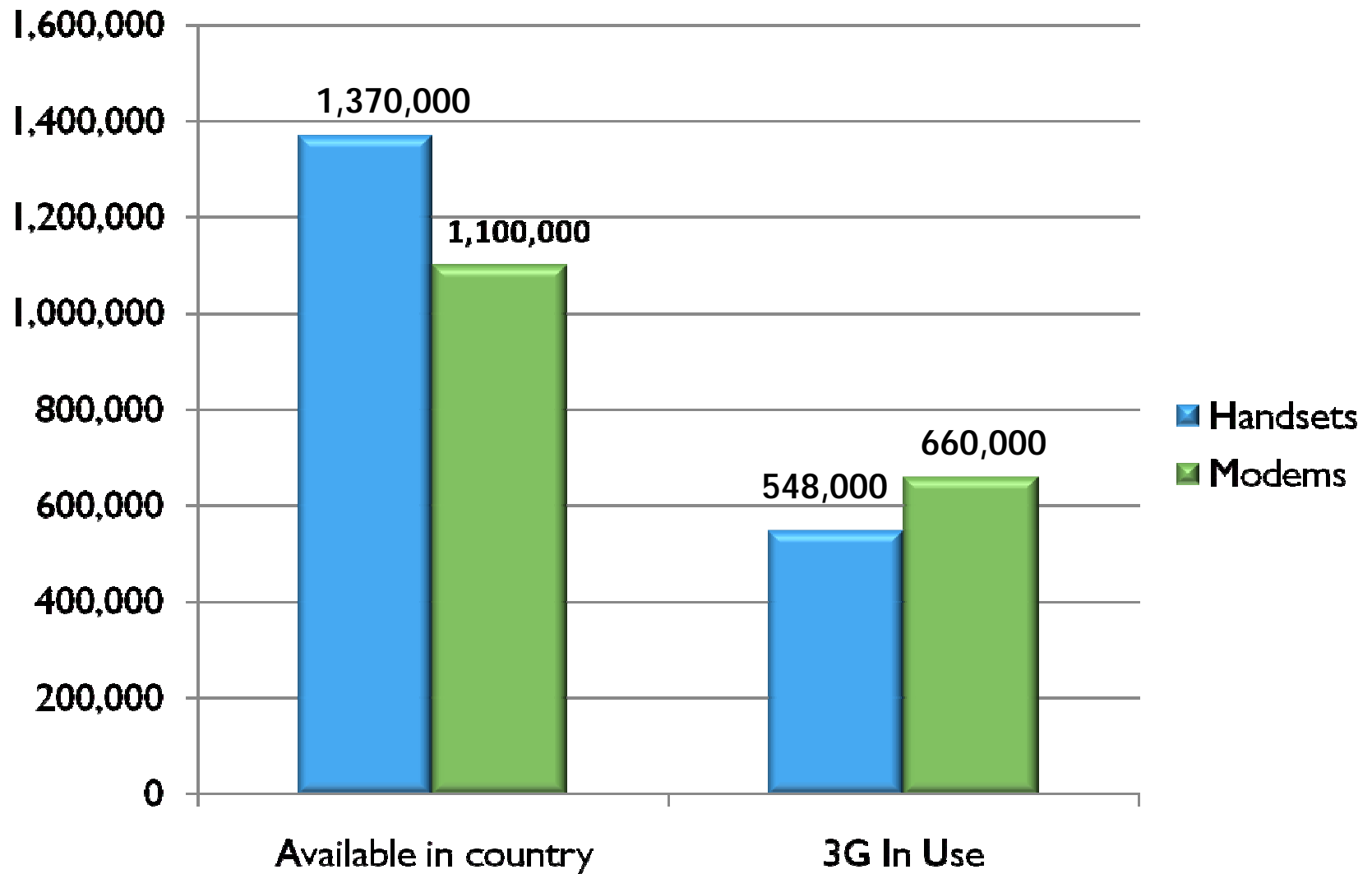
Smartphone Unit Growth Forecast



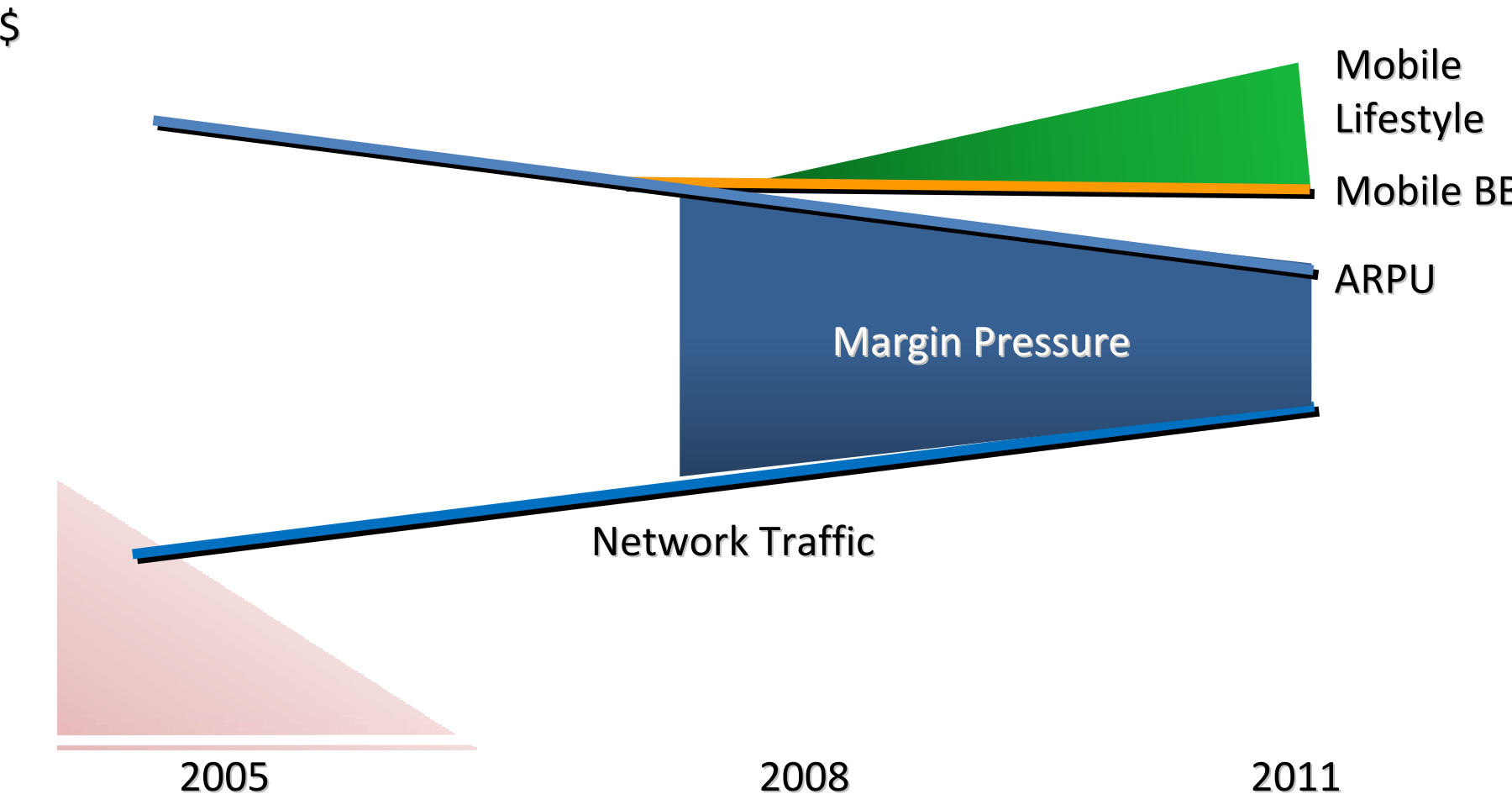
3G Device Growth in Brazil



3G Devices in Argentina 2007-2010



Global ARPU Trends



Mobile Traffic will keep Growing

Voice services will continue growing but information-based services will grow much more



Embedded Mobile Broadband

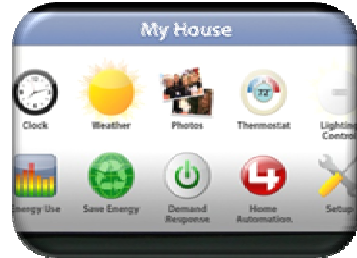
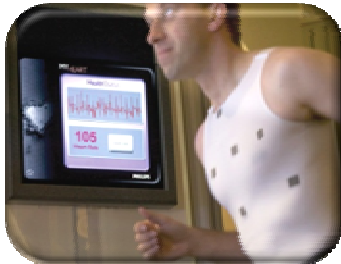
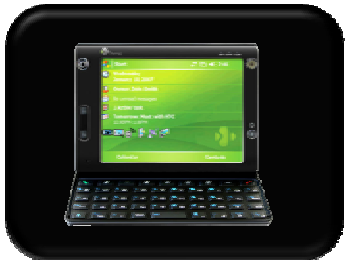
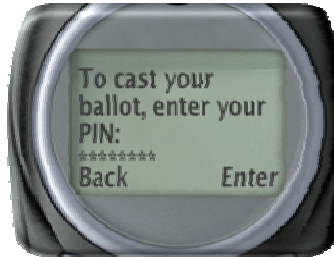
Consumer Electronics

Healthcare

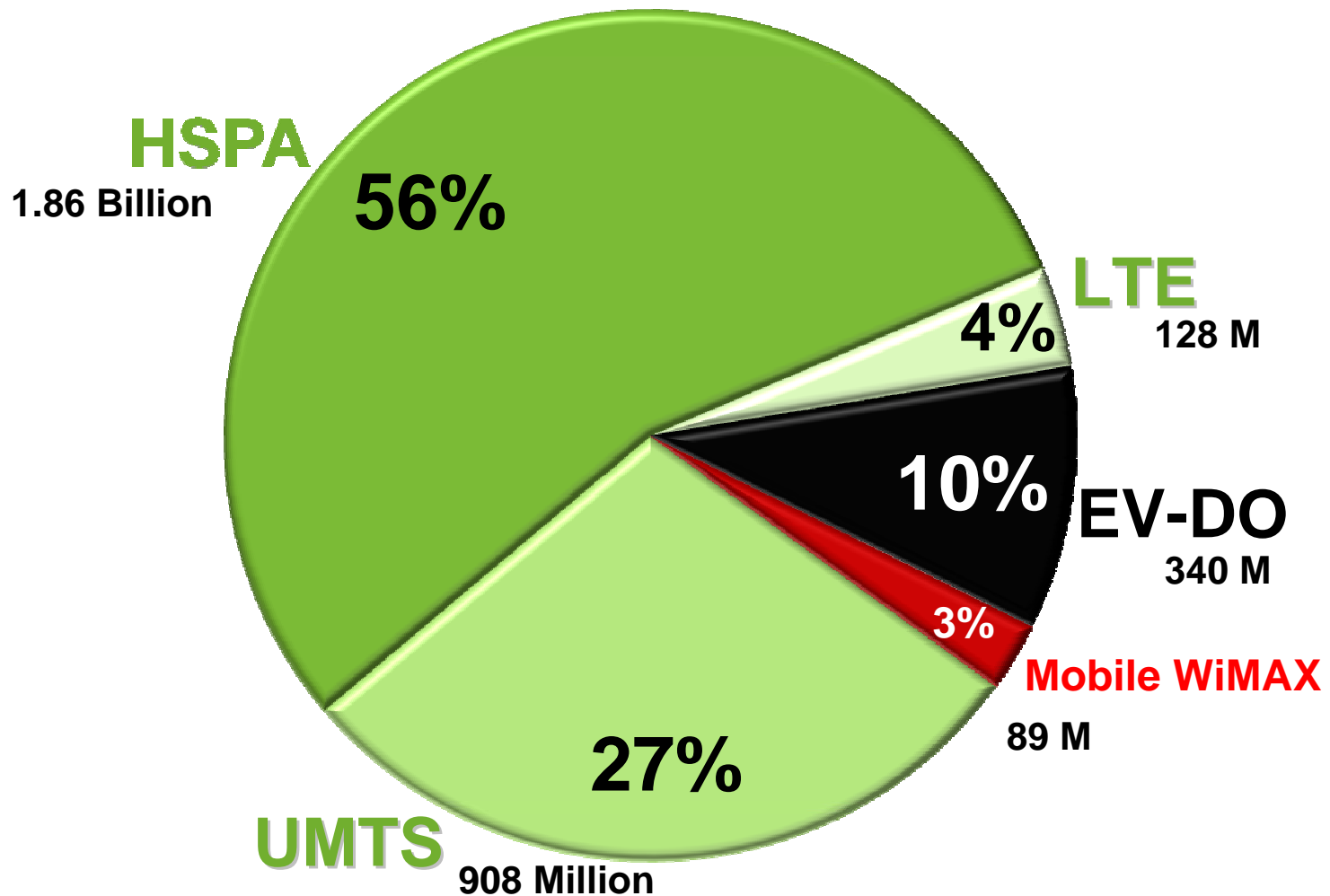
Government

Automotive

Utilities



2014 Global 3G Subscription Forecast



3GPP technologies (UMTS+HSPA+LTE): 87%, CDMA: 10%, Mobile WiMAX: 3%

Latin America Challenges

- No spectrum made available for advanced mobile broadband services
- Governments are promoting new entrants by using spectrum caps
- High taxes for wireless services and equipment
- No spectrum auction for 4G; likely bands are 2,5 GHz, 1.7/2.1 GHz and 700 MHz
- Low broadband penetration (less than 10%)

Obrigado!

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