



Recent Trends in Mobile Data Needs



Changing Needs



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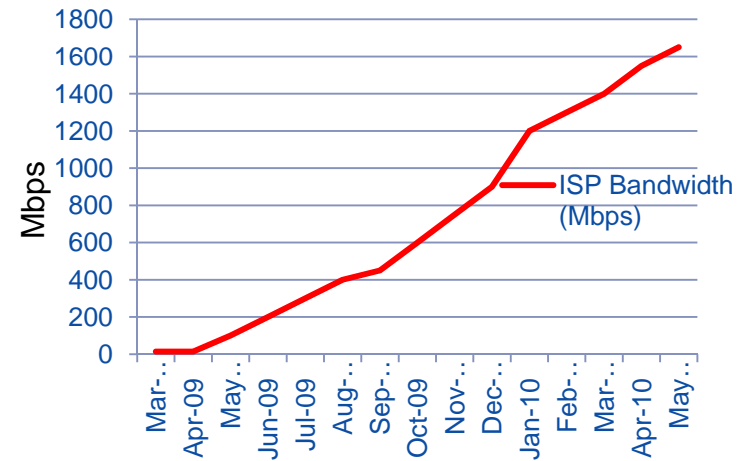
- Free Wallpapers*
- Free games*

PocketInternet™ AIRCEL

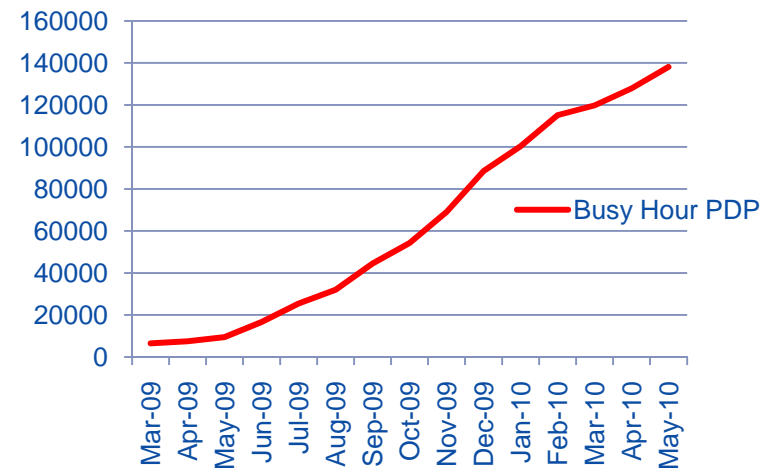
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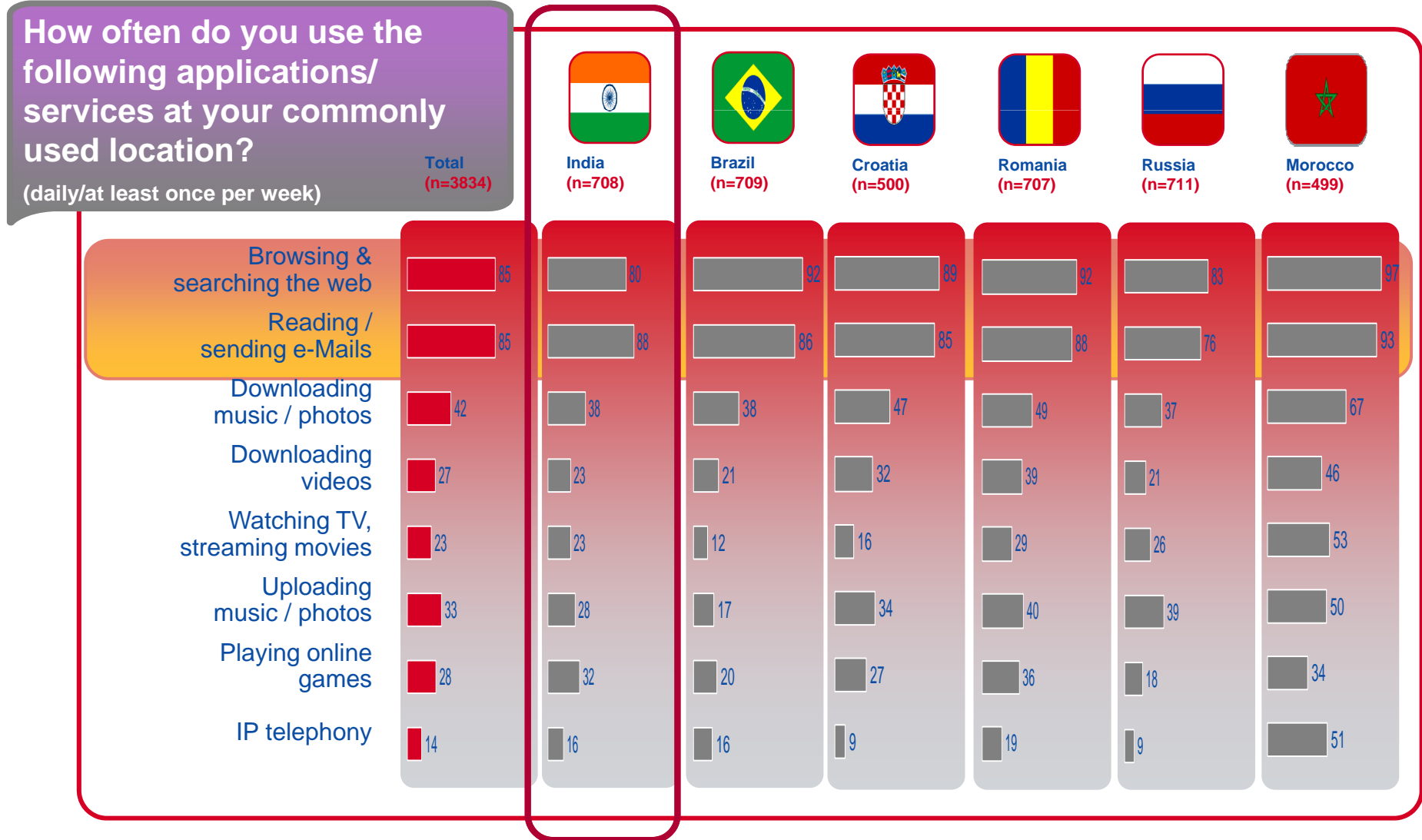
ISP Bandwidth (Mbps)



Busy Hour Data Connections



subscribers want Internet access and e-mail

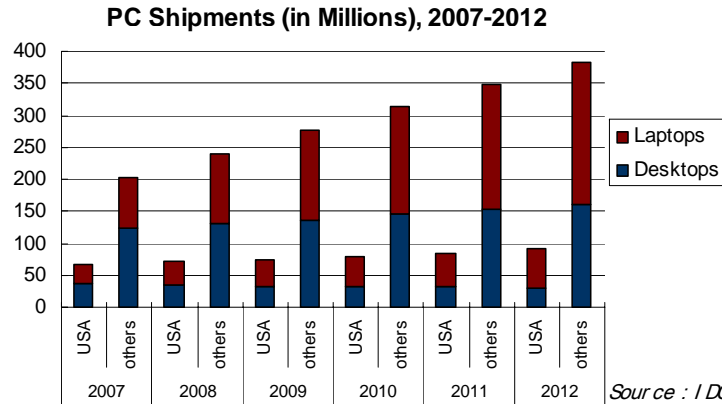


¹Source: Mobile Broadband Study, 2008

Changing mobile handset landscape



Laptops : Annual growth of 25% ; and shipments exceed desktops in Q3,2008



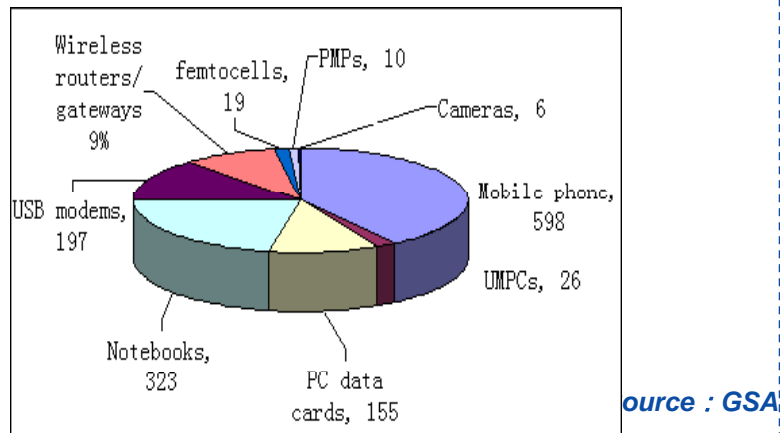
Smart Phones : rise 28%, shipments hit new peak of 39.9 million in Q3 2008

Worldwide smart phone market
Market shares Q3 2008, Q3 2007

Vendor	Q3 2008 shipments	% share	Q3 2007 shipments	% share	Growth Q3'08/Q3'07
Total	39,850,100	100.0%	31,156,240	100.0%	27.9%
Nokia	15,485,690	38.9%	16,025,690	51.4%	-3.4%
Apple	6,899,010	17.3%	1,107,460	3.6%	523.0%
RIM	6,051,730	15.2%	3,298,090	10.6%	83.5%
Motorola	2,313,930	5.8%	2,058,500	6.6%	12.4%
HTC	2,308,210	5.8%	850,400	2.7%	171.4%
Others	6,791,530	17.0%	7,816,100	25.1%	-13.1%

Source: Canals estimates, © canals.com Ltd. 2008

HSPA Terminals: (May, 2009)
Suppliers: 171; Launched Devices: 1470



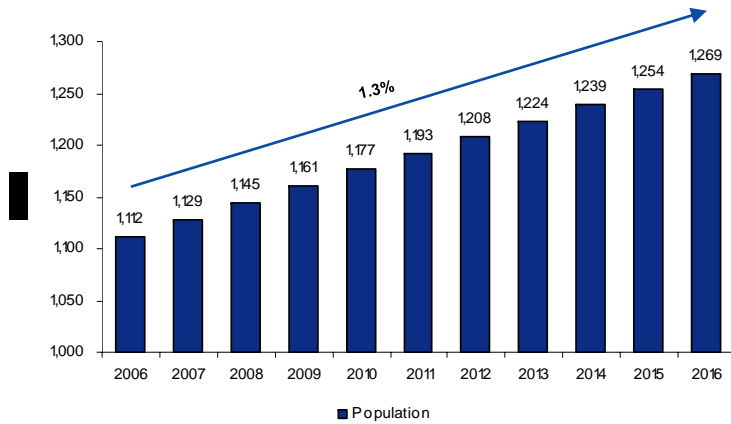
Output/Input ready : big screen and high performance
(Apple, Google, Microsoft)



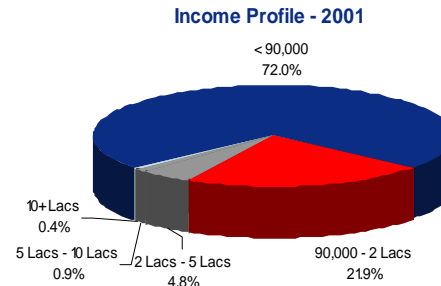
India Demographic Profile



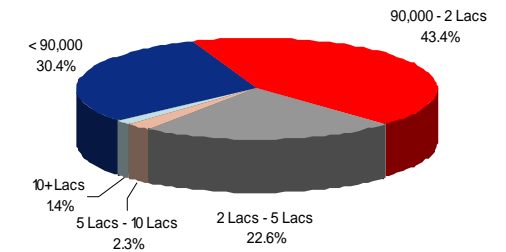
Population Growth



Income Profile

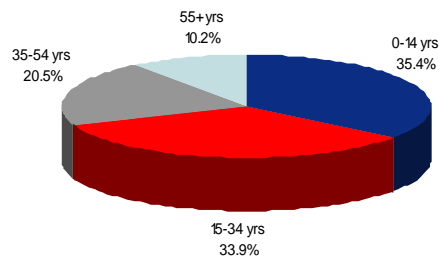


Income Profile - 2015E

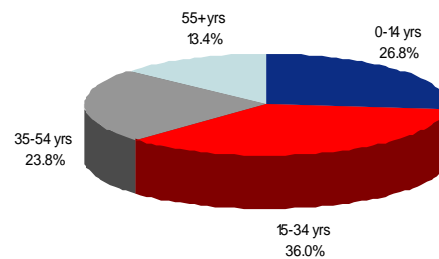


Age Profile

Age Profile - 2001



Age Profile - 2016E



Key Statistics

Literacy Rate (2001) (%)	61.0%
Urban Population (2008) (%)	28.7%
Urban Population (2016E) (%)	31.6%
GDP Growth (2009E) (%)	7.0%

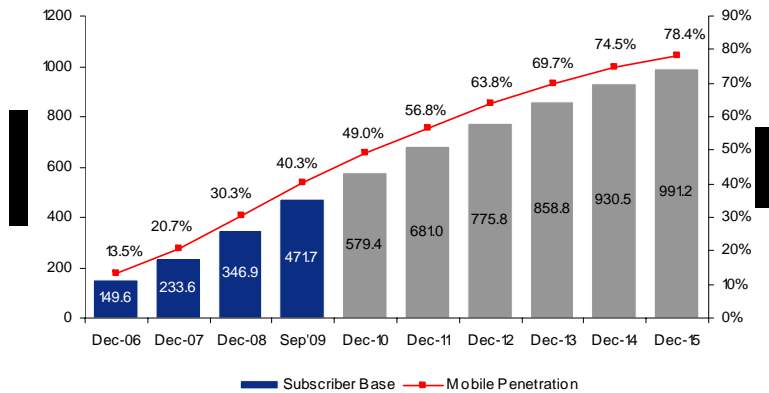
Increasing young population and rising income levels will drive the demand for information & entertainment

Source: CrisInfac, Census of India, NCAER, Global Insight

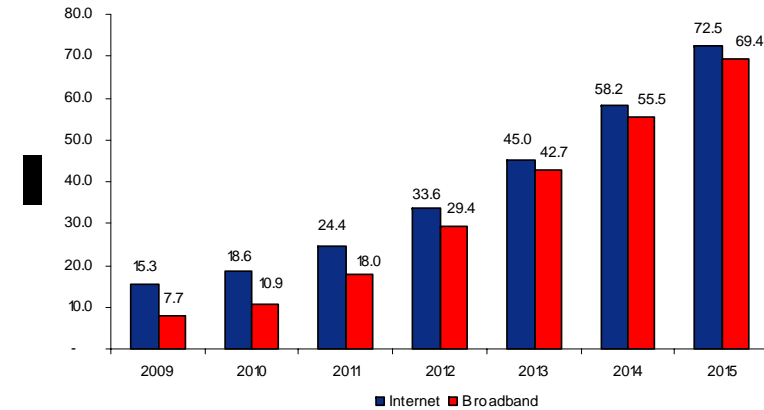
India Telecom Market



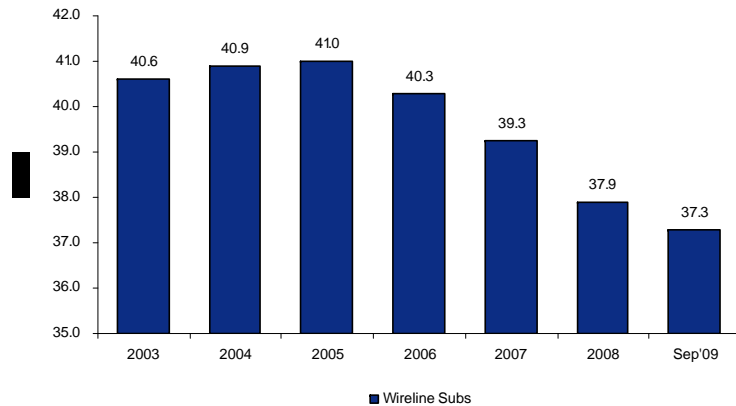
Mobile subscriber base & penetration trends



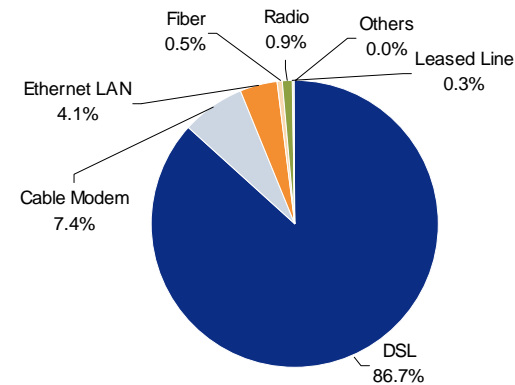
Internet and broadband subscribers



Wire-line subscriber base



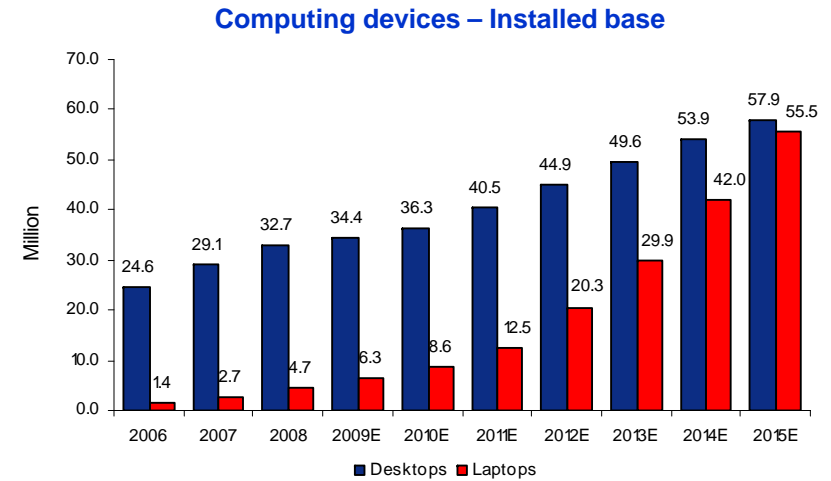
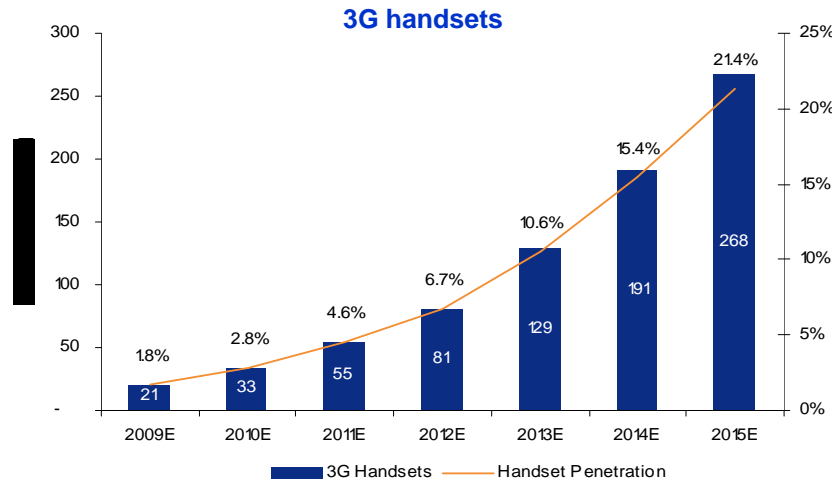
Broadband access technologies (Jun '09)



With limited wire-line infrastructure, wireless technologies are expected to drive broadband penetration

Source: TRAI, Noble Research. EY Analysis

Growing devices market fuelling broadband market

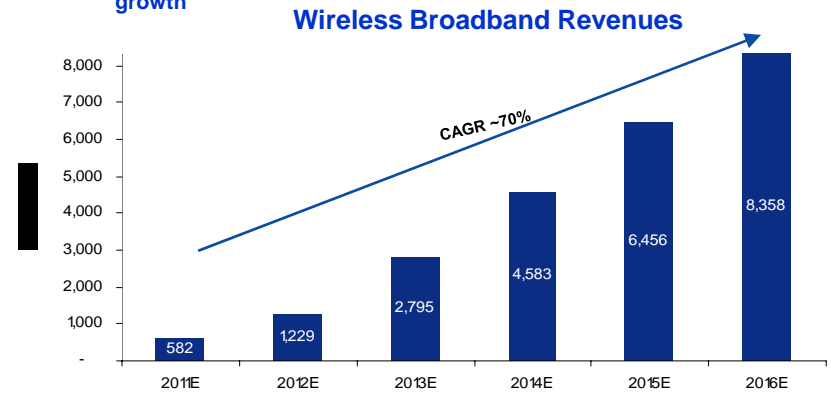
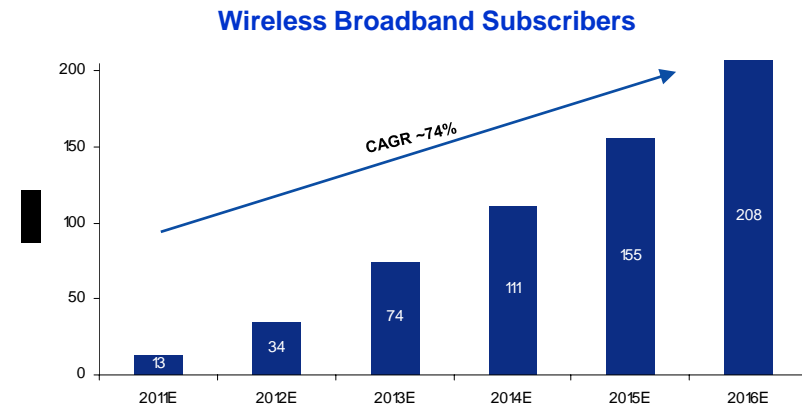


Drivers for growth

- Falling prices of 3G enabled handsets & Increasing disposable income levels
- Need to access high bandwidth applications on the go

Drivers for growth

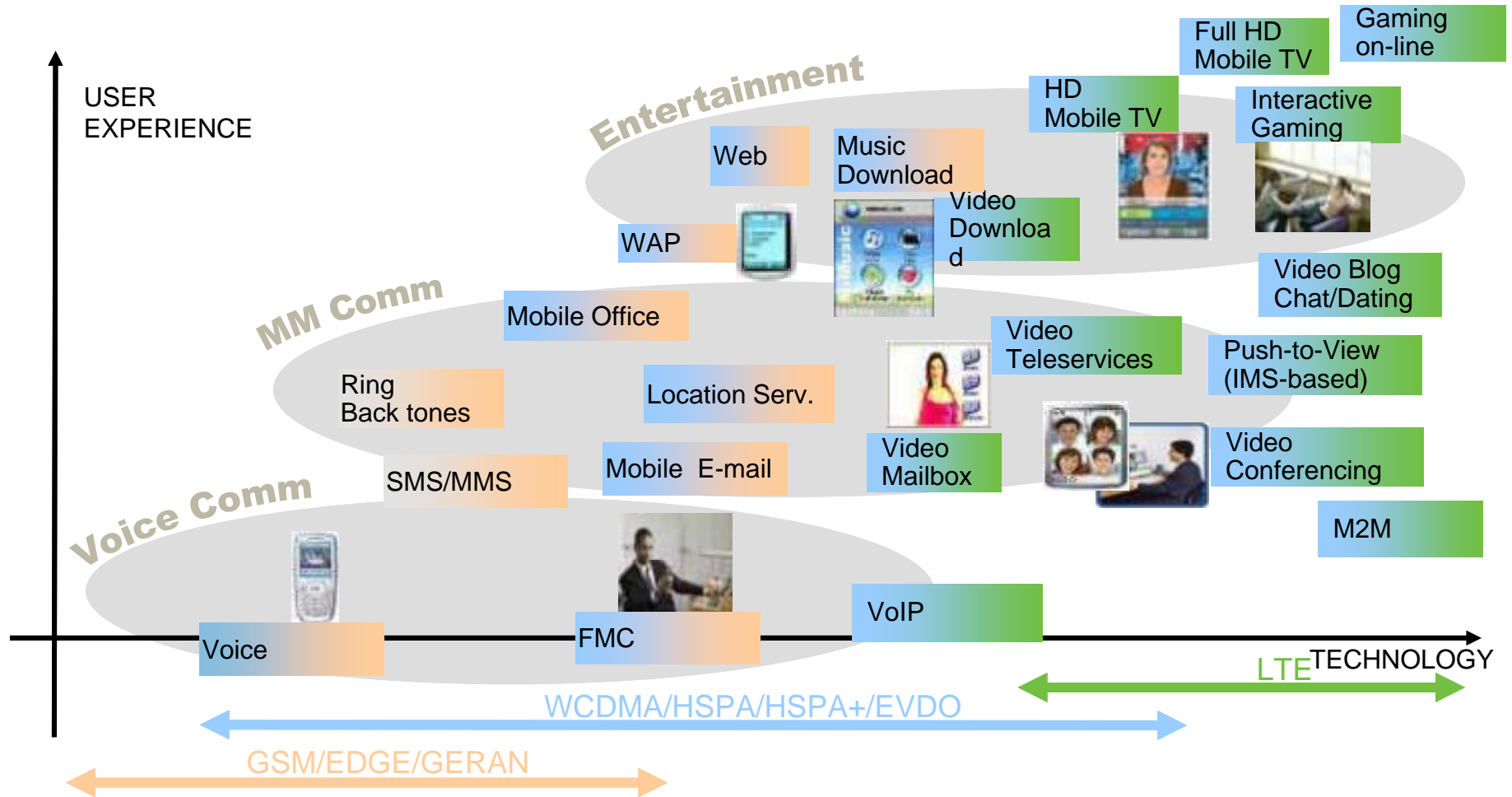
- Falling prices of laptops & Increasing disposable income levels
- Need to access high bandwidth applications on the go
- Need for privacy and individual ownership leading to higher laptop growth



3G handsets and computing devices are projected to grow at a fast pace fuelling demand for wireless broadband

Source: EY Analysis

Technologies matching the user needs



Thank You



An Aircel Initiative

