



TOPIC:
Russian Merging
and Converging markets
- Now and in the Future



October 22nd 2007

J'son & Partners

- **50%**
- **"Plaque Tournant"**
- **Future**
- **Conclusions**

This presentation was accompanied by an oral presentation. These remarks form an integral part of the presentation.

For any questions please contact us - see contact details on the last page



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J'son & Partners: Some of our Clients

October 2007



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J'son & Partners clients are industry leaders, start-ups, investors and government. This page shows some examples of our clients and sample testimonials.

Type of work	Complexity Level	Results
Industry Databanks (150+Clients)	●	Business Plan
Business Connection (50+Clients)	●	New Business Partners Contacts
Regional Analysis (100+Clients)	●	Commercial Development Regional Opportunities
Enterprise Evaluation (Cable company, TV, CLEC, Satellite etc.)	● ●	Bank Refinancing, M&A Negotiation
Business Plan (WiMAX, Mass Portal,+)	● ●	Action plan, Business development, Investment
Market Forecast Model (3G, Cellular, BB,+)	● ●	Company Forecast, Business Plans, Financial Model
Complex Business Plan and Forecasting Model for Telco Holding for 65+region and several technologies	● ● ●	Development Strategy, CEO Decision, Board of Director
Strategy Development for 15 regions and 12 Business Cases	● ● ●	Investment Strategy, Board of Director Approval
3G Network Business Plan and CAPEX Analysis 89 region	● ● ●	Ministry of Communication License Tender

More than 50 projects in parallel...so new clients need to book in advance 😊

50%

The Networked Readiness Index 2006–2007 rankings

Rank	Country/ Economy	Score
1	Denmark	5.71
2	Sweden	5.66
3	Singapore	5.60
4	Finland	5.59
5	Switzerland	5.58
6	Netherlands	5.54
7	United States	5.54
8	Iceland	5.50
9	Scandinavia on the top	5.45
10		5.42
11	Canada	5.35
12	Hong Kong SAR	5.35
13	Taiwan, China	5.28
14	Japan	5.27
15	Australia	5.24
16	Germany	5.22
17	Austria	5.17
18	Israel	5.14
19	Korea, Rep.	5.14
20	Estonia	5.02
21	Ireland	5.01

Rank	Country/ Economy	Score
62	Indonesia	3.59
63	Argentina	3.59
64	Colombia	3.59
65	Russia amongst top-100	3.58
66	Dominican Republic	3.56
67	Botswana	3.56
68	Trinidad and Tobago	3.55
69	Philippines	3.55
70	Russian Federation	3.54
71	Azerbaijan	3.53
72	Bulgaria	3.53
73	Kazakhstan	3.52
74	Serbia and Montenegro	3.48
75	Ukraine	3.46
76	Morocco	3.45
77	Egypt	3.44
78	Peru	3.43
79	Guatemala	3.41
80	Algeria	3.41
81	Macedonia, FYR	3.41
82	Vietnam	3.40

Being networked is not just a question of hardware and digital devices. The whole society should be ready to adapt to global change.

Market Size, \$ Bln	2005	2006	2007	2010	2012
IT	13	17	21	30	38
Cellular	10	14	20	31	39
Fixed & Wireline	8,1	9,8	12	15	18
Digital Content	1,3	1,7	2,5	4,8	7
Broadband	0,9	1,4	1,9	3,5	4,6
New services	0	0	0,8	13	16
Total	33,7	44,3	57,7	97,2	122,6

Source: J'son & Partners

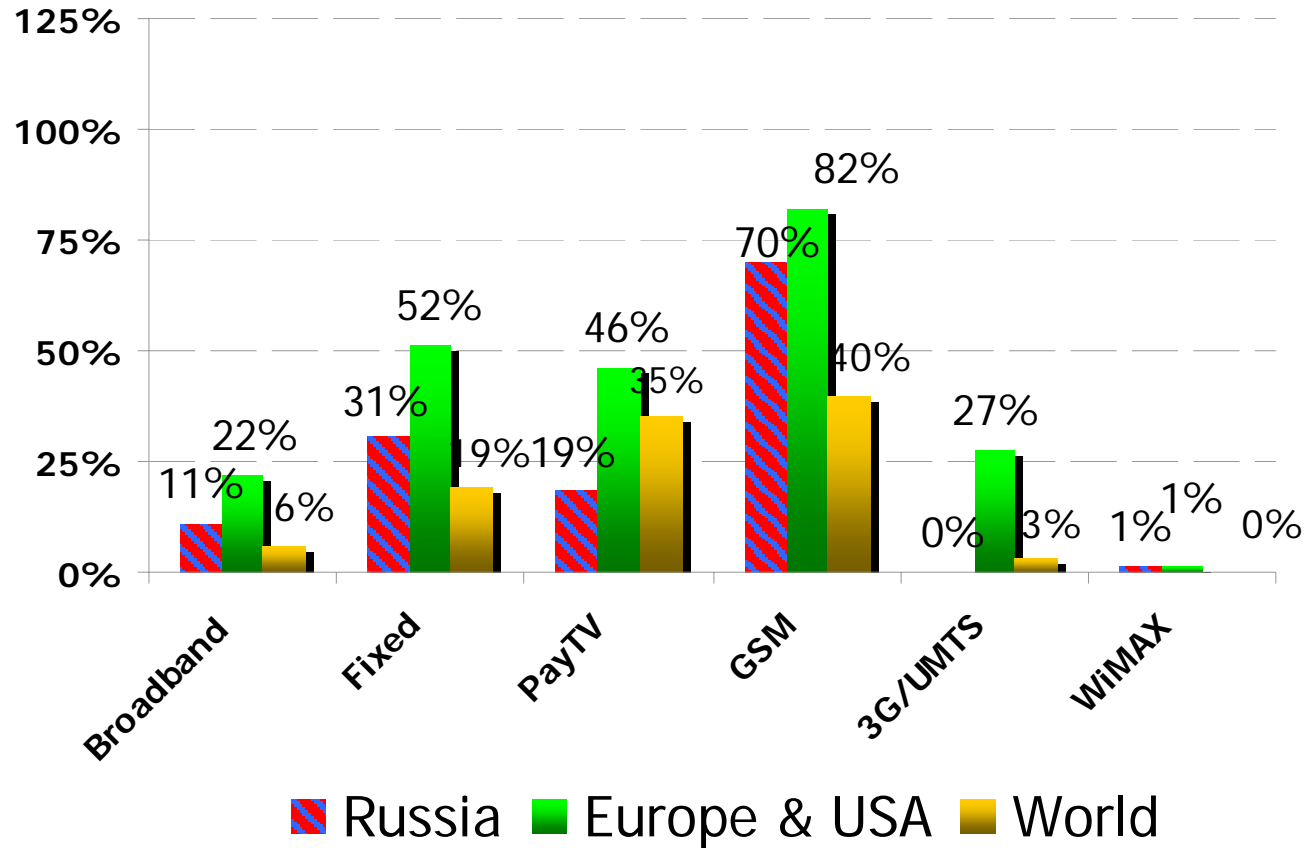
Russia is "only" halfway towards being a leader in the ICT Business

Mobile Segment	2005	2006	2007	2010	2012
Mobile Subscribers, Million [SIM cards]	126	152	170	181	189
Mobile Penetration, % [SIM cards]	88%	106%	120%	127%	133%
Internet and Broadband	2005	2006	2007	2010	2012
Weekly Internet audience, Million	8,5	9,4	11,8	27,5	40,7
Broadband Penetration, % of households	2,7%	6,8%	11%	32%	52%

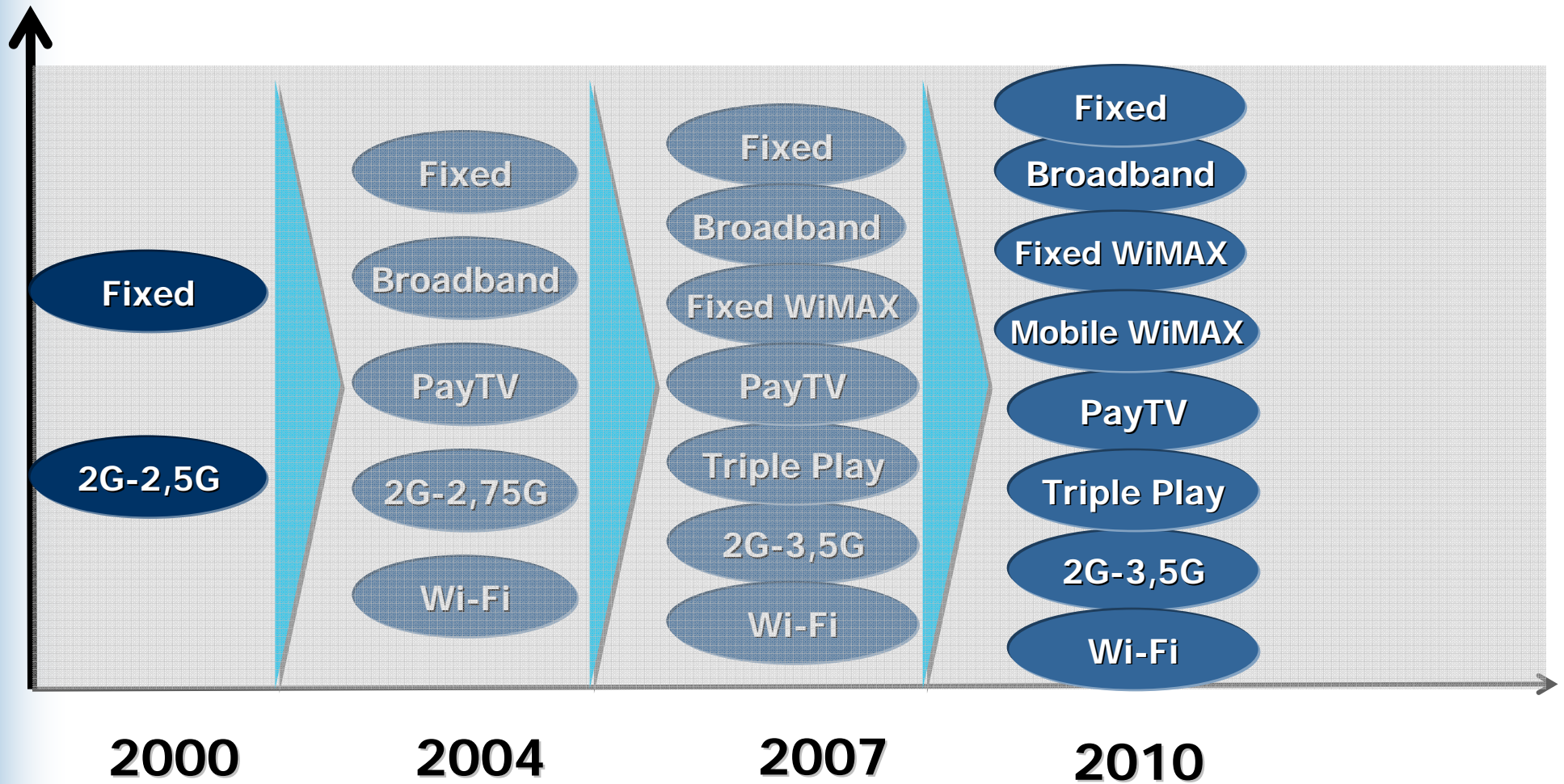
Source: J'son & Partners

Broadband, Cellular and Content will drive the growth

Penetration level by technologies & applications, 2007

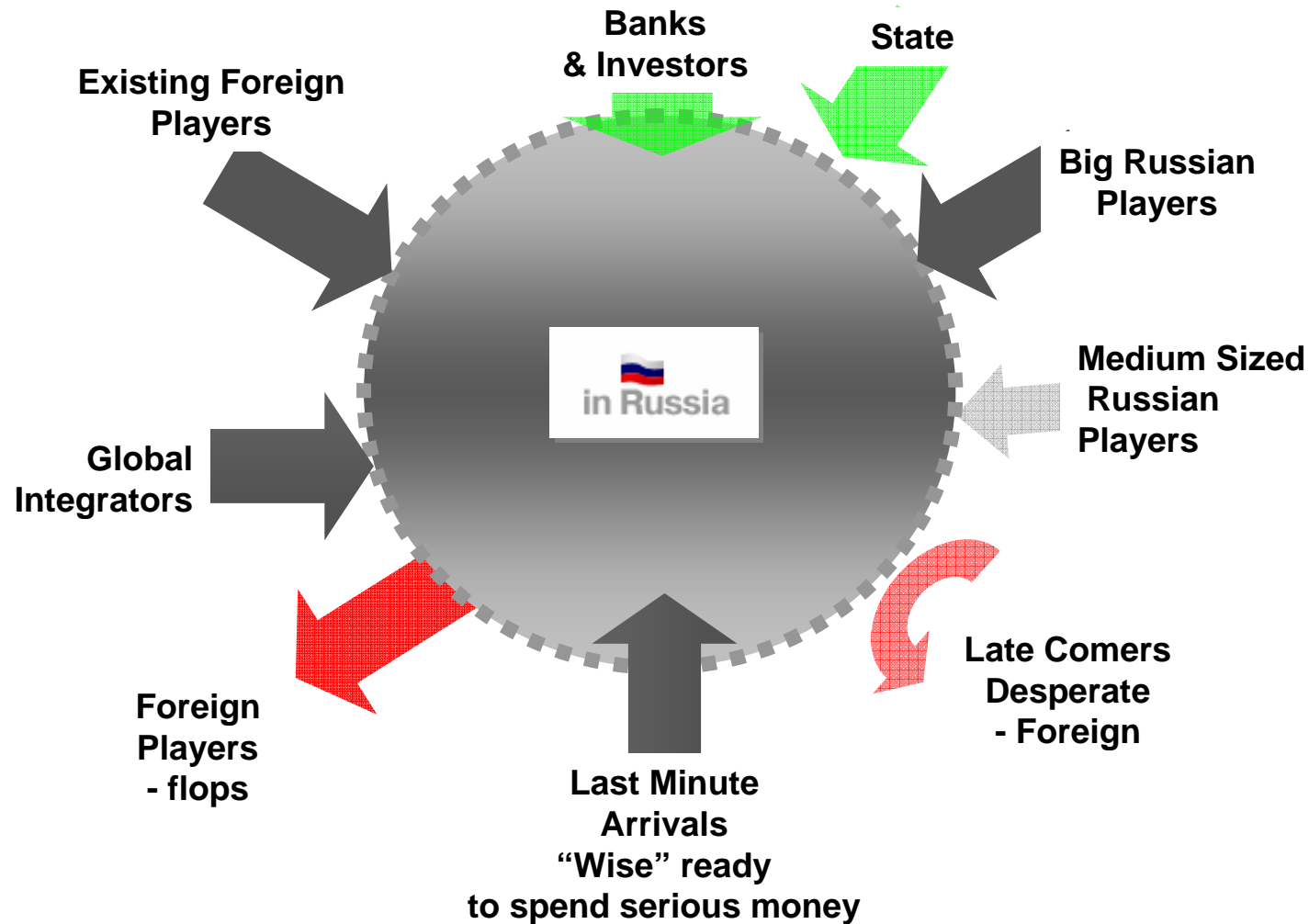


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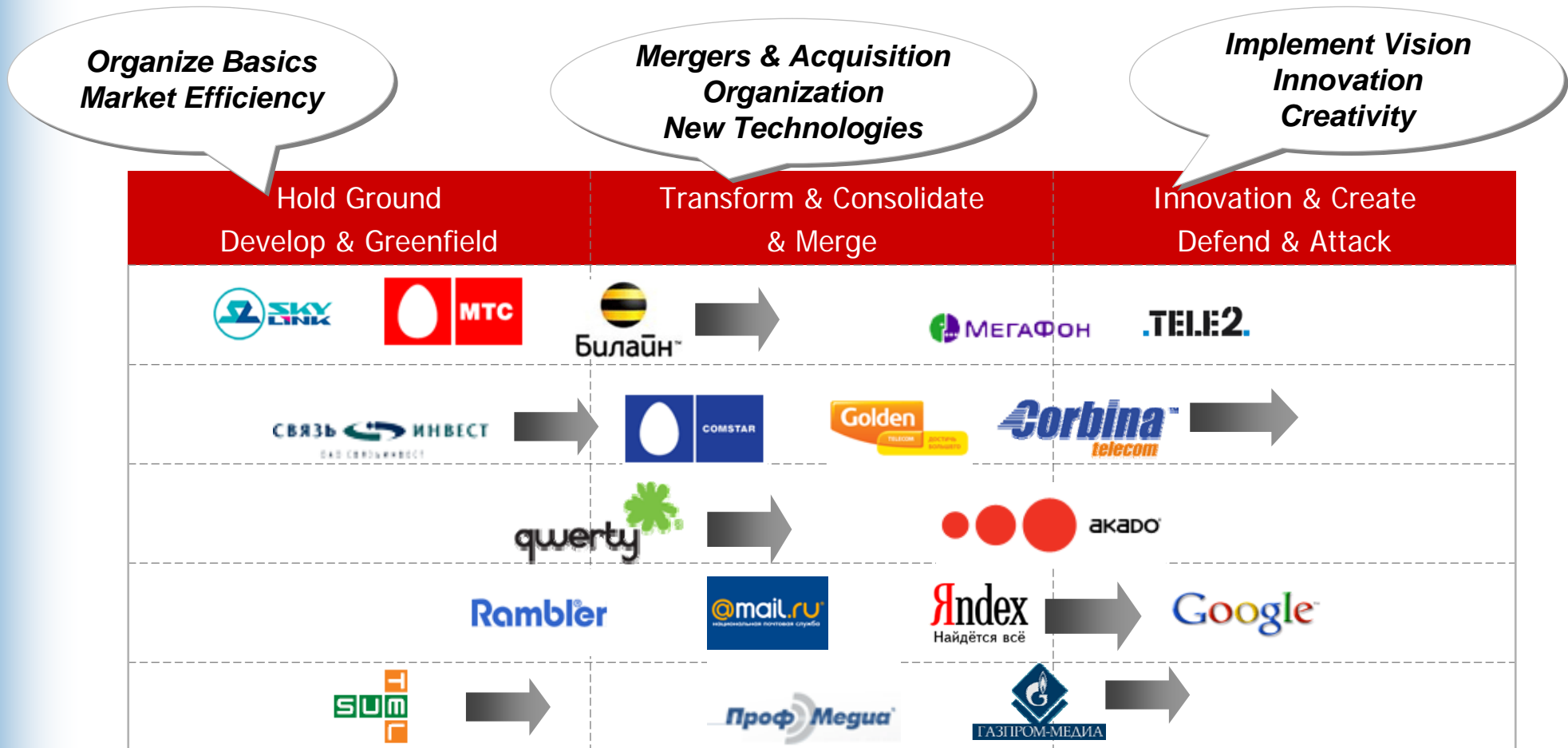


Russian is implementing all leading technologies.

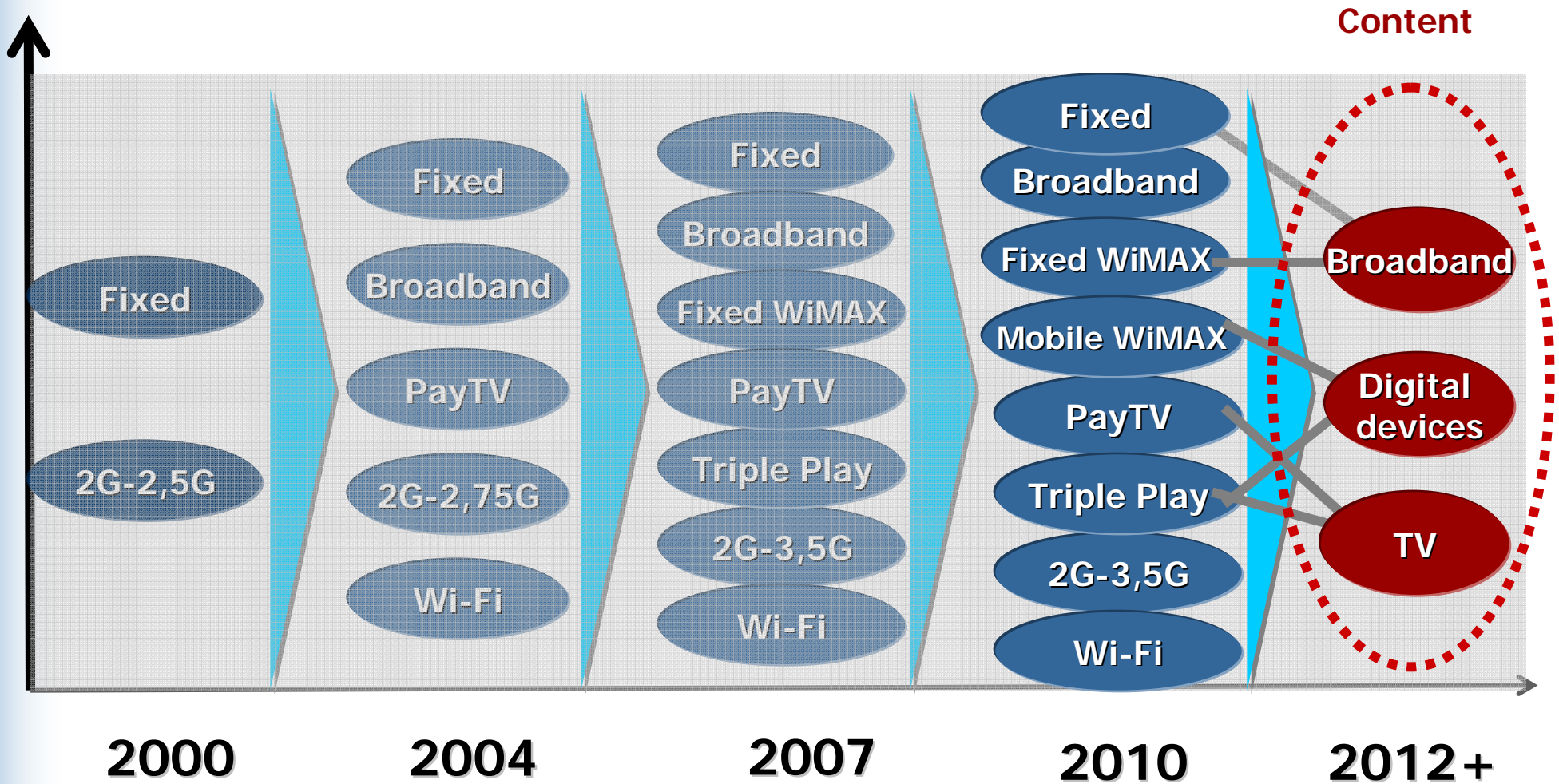
Plaque tournant



Russian market offers opportunities to many different market players. Timing and critical mass are "stand-out" factors.

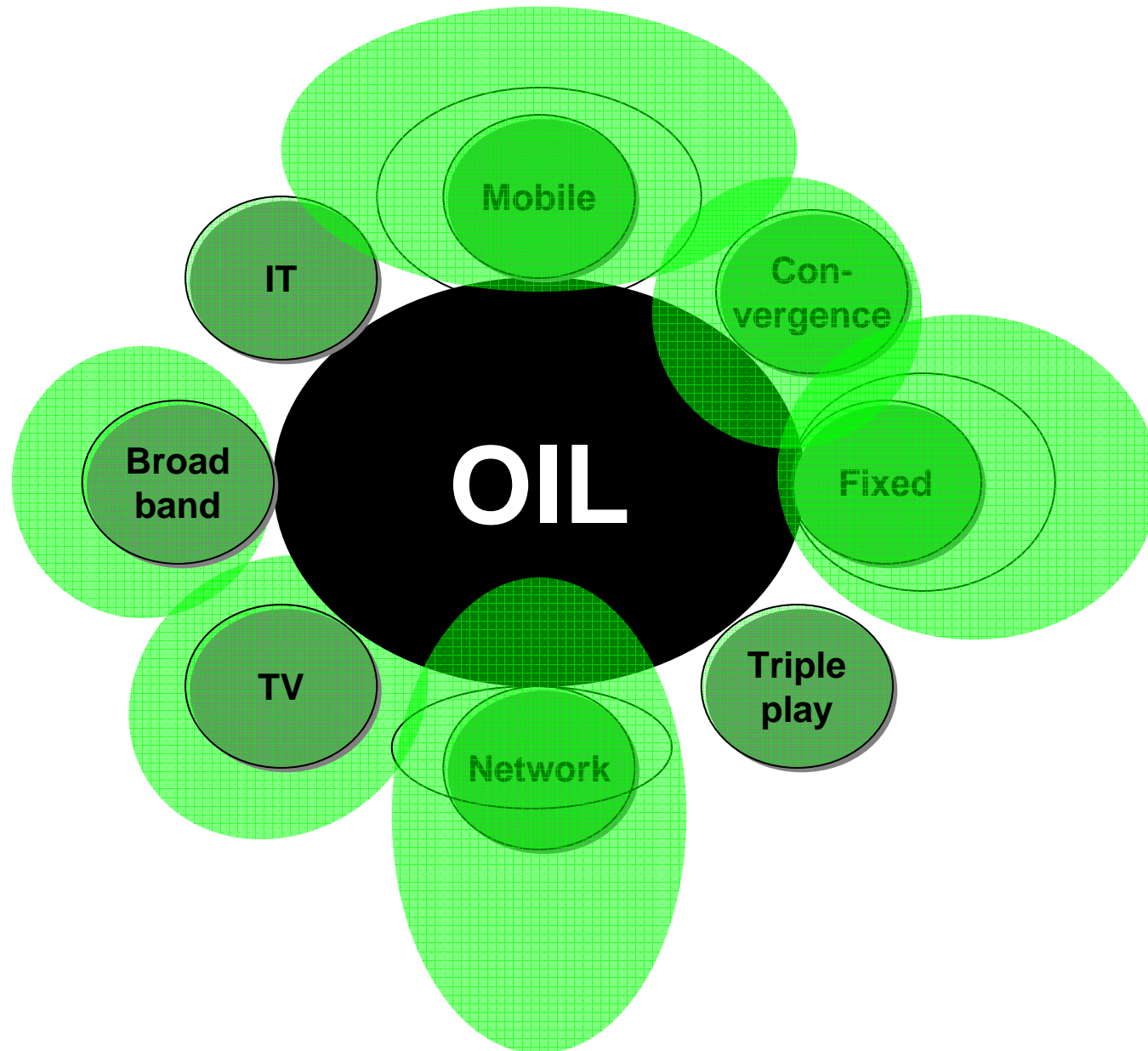


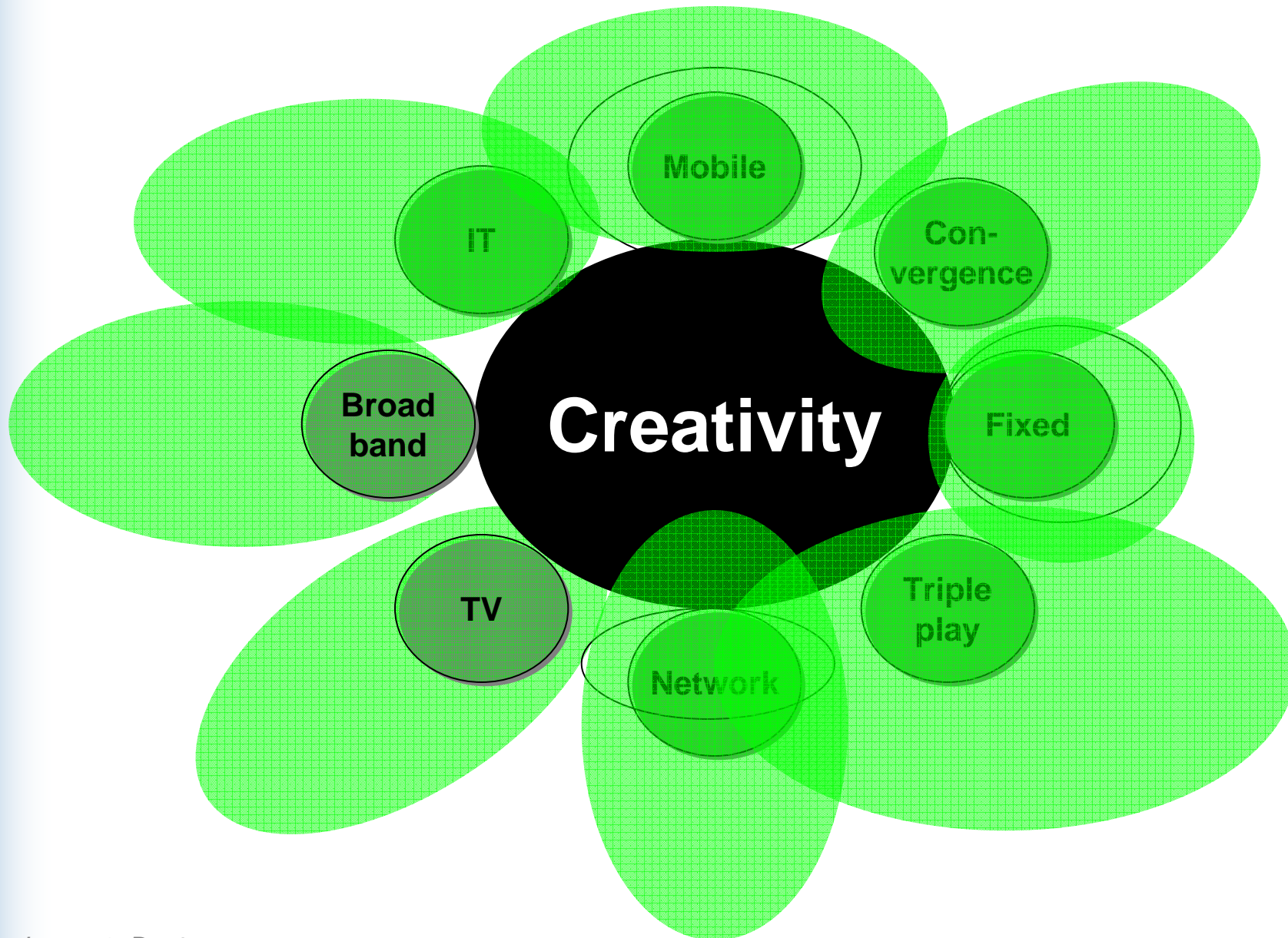
Russian market players are adapting to the market in waves.
Vision, brand and management are of critical importance.

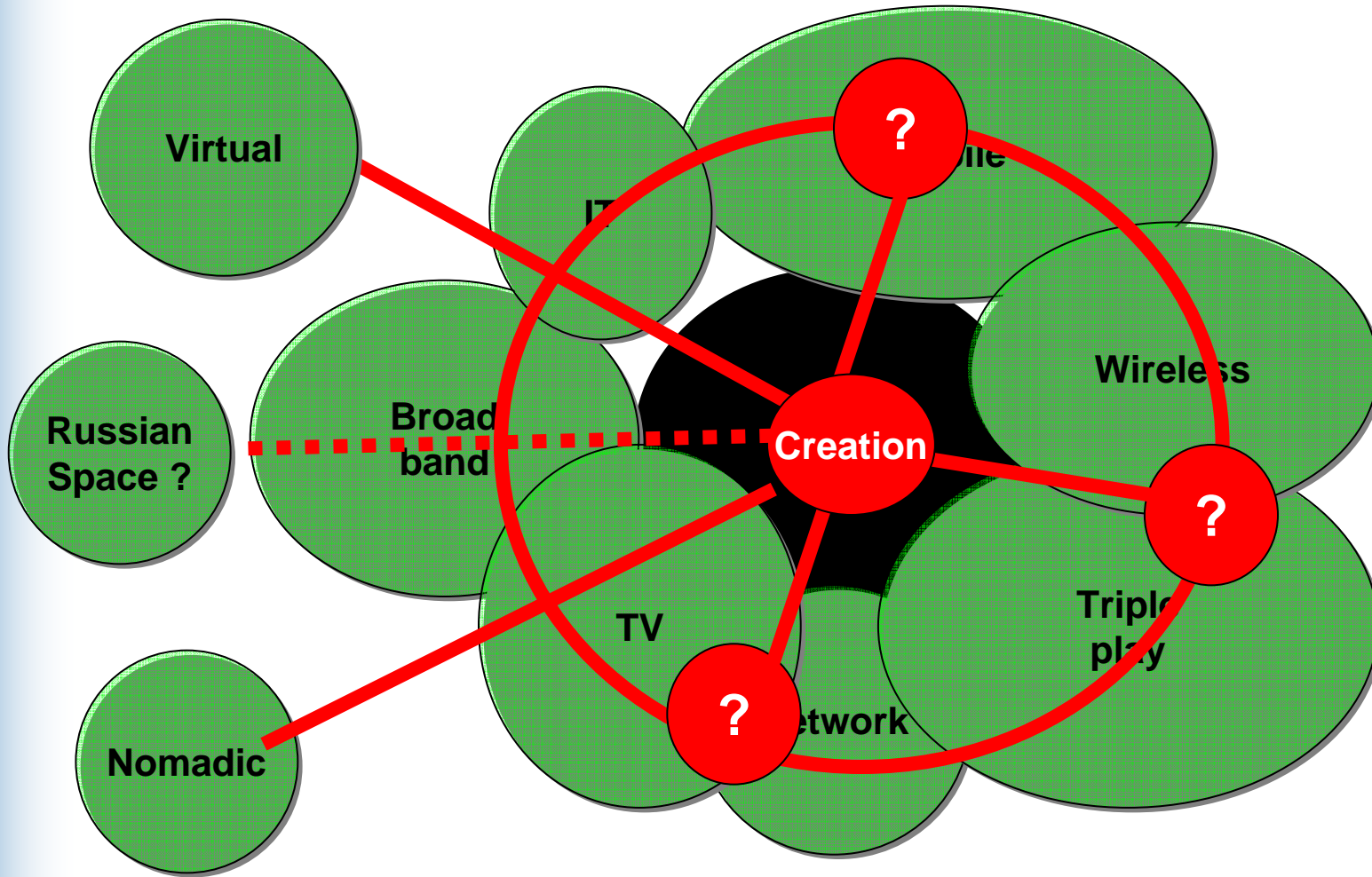


Starting 2007-2010 content will be influential and by 2012 – “it will all be about content” clustered around BB, TV and Digital Devices.

Future







1

- Large IT growth fuelled by broadband and IP growth
- Government policies are important for overall success
- Economy is growing

2

- International Level – evolving in the right direction

3

- Creativity & Innovation will be the keys for the future
- Creativity emerging not from hardware but from people and critical mass
- Russia could start being **really** innovative and creative in IT, media and telecoms very soon ! Why not ☺

People:

Russia has a huge network of creative and managerial talent. This latent "Country Genius" is just waiting to be rediscovered.

Short term ROI Thinking.
Invest now and get back
Yesterday or today.

Russian mobile customers spend "more" than they can afford on essential mobile services. However for 3G services "\$1 out should give \$2 back"

Special Russian Drivers
Copyright approach
Semi-legalities
Tax legislation
Corporate accounting
Special framework for making progress

Bandwidth

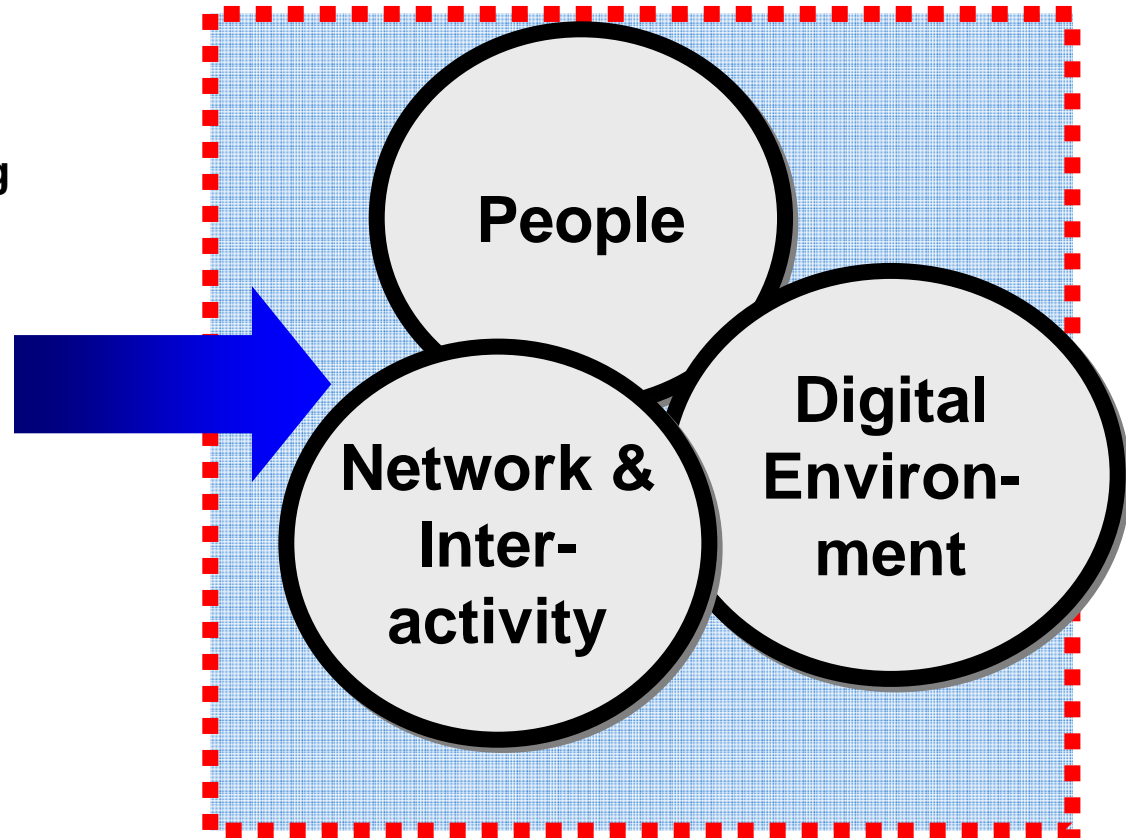
Offices and people accessing Internet with a high speed

Applications

Entertainment +
Business Applications

Interactivity

New ways of interacting
- Exchanging



Mobile Monday - could be great digital meeting place for positive change...

*“In the future Creativity will be within reach for any digital human being.... until then creativity will thrive in the intersection where **individuals**, global [social] **networks** and **economies/cultures** intersect”*

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