Telsyte

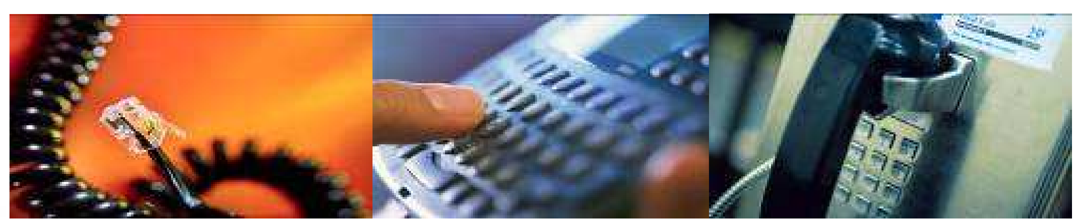
CONVERGED COMMUNICATIONS

COMPETITIVE INTELLIGENCE

Australian Enterprise Mobility
What Lies Ahead?

24 October 2007
Sydney

Warren Chaisatien
Managing Director



Who Are We?

- Australia’s leading telecom market research & consultancy firm
- Specialised in competitive intelligence of converged communications
  - Carrier & Broadband
  - Mobile & Wireless
  - Enterprise Comms
- Well known for our online databases
  - Instant Benchmark
  - Instant Forecast
- Clients include leading telcos & ISPs, equipment & handset vendors, corporate & government end-users
- Based in Sydney & a business unit of Gibson-Quai AAS Consulting

GQ·AAS
GIBSON QUAI·AAS
CONSULTING

Agenda

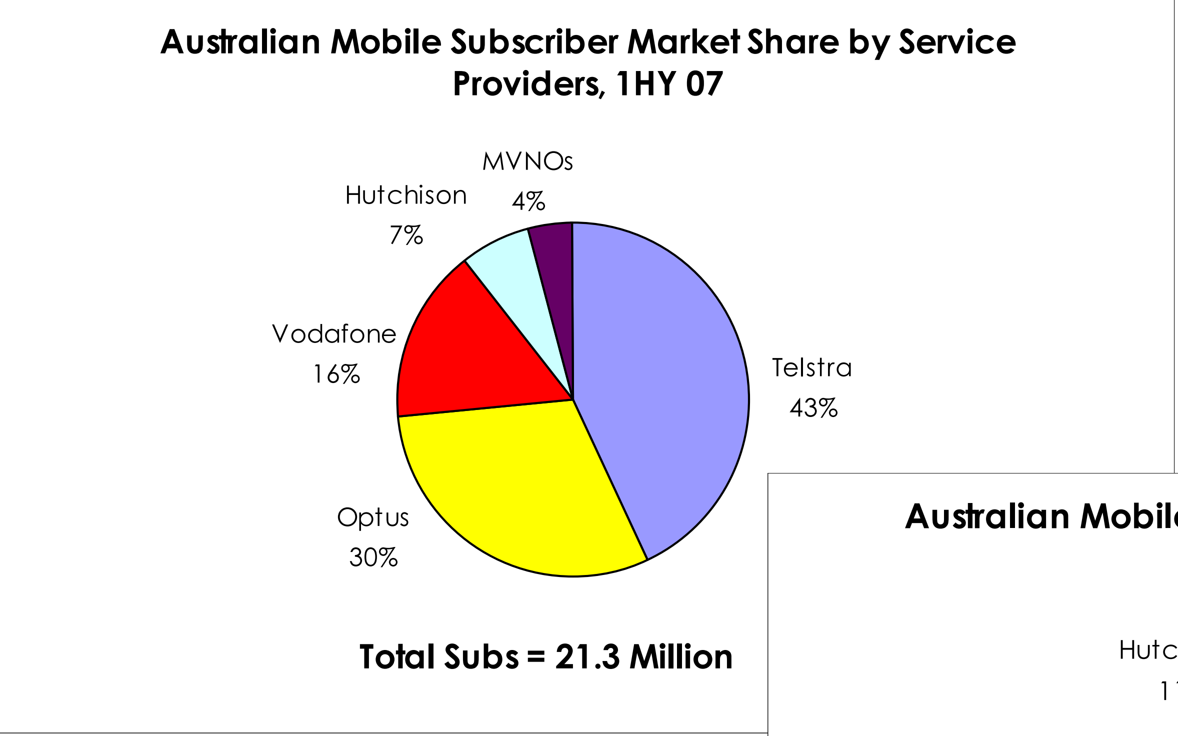
- Australian Mobile Market Snapshot, June 2007
- Enterprise Mobility Market Update, based on End-user Survey
  - Carrier preference & spending
  - Application & technology adoptions
  - Drivers & inhibitors
  - Device vendor competitive analysis

Information Sources

- "*Australian Business Mobile Usage and Directions, 2007 End-User Survey*" Report, June 2007
- "*Australian Mobile Market, 2006 Review & 2007-2011 Forecast*" Report, March 2007
- "*Instant Forecast*" online database, Mobile Market modules, Aug 2007 update cycle

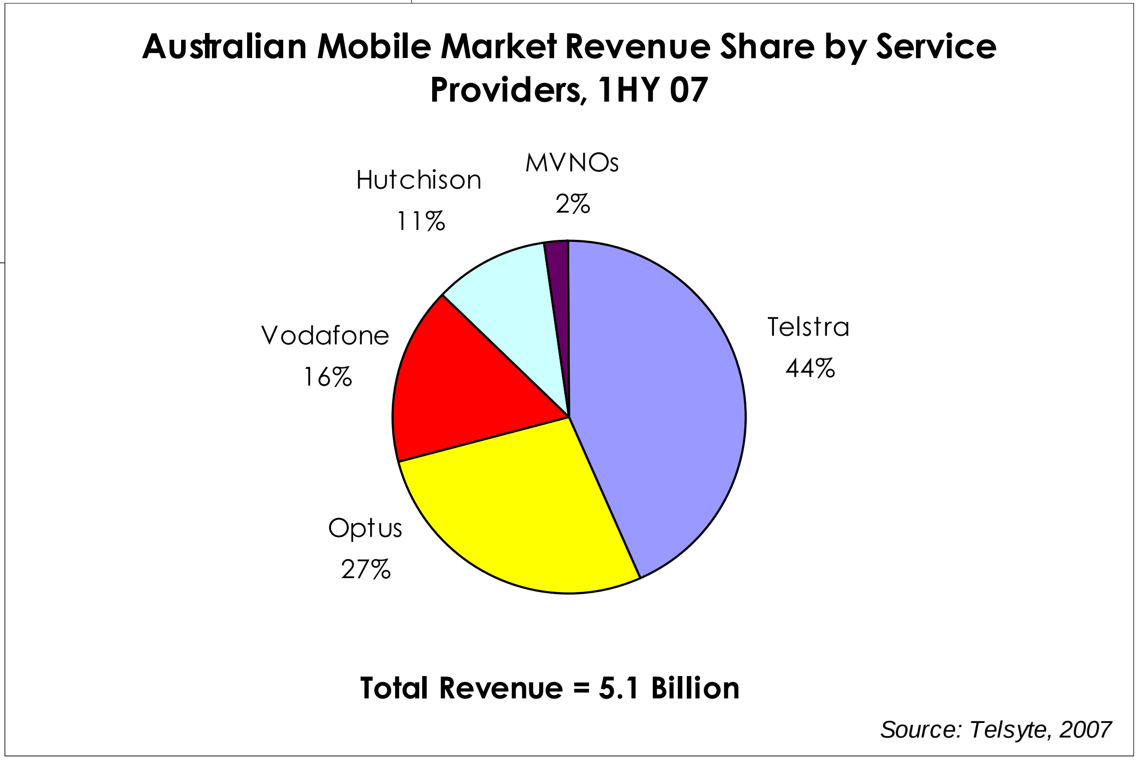
GQ·AAS
GIBSON QUAI-AAS CONSULTING

Australian Mobile Market, June 2007



Subscribers

- 101% penetration
- 6% growth YoY
- 3G share = 23%
- Prepaid share = 49%
- Hutch – fastest growing 24% YoY

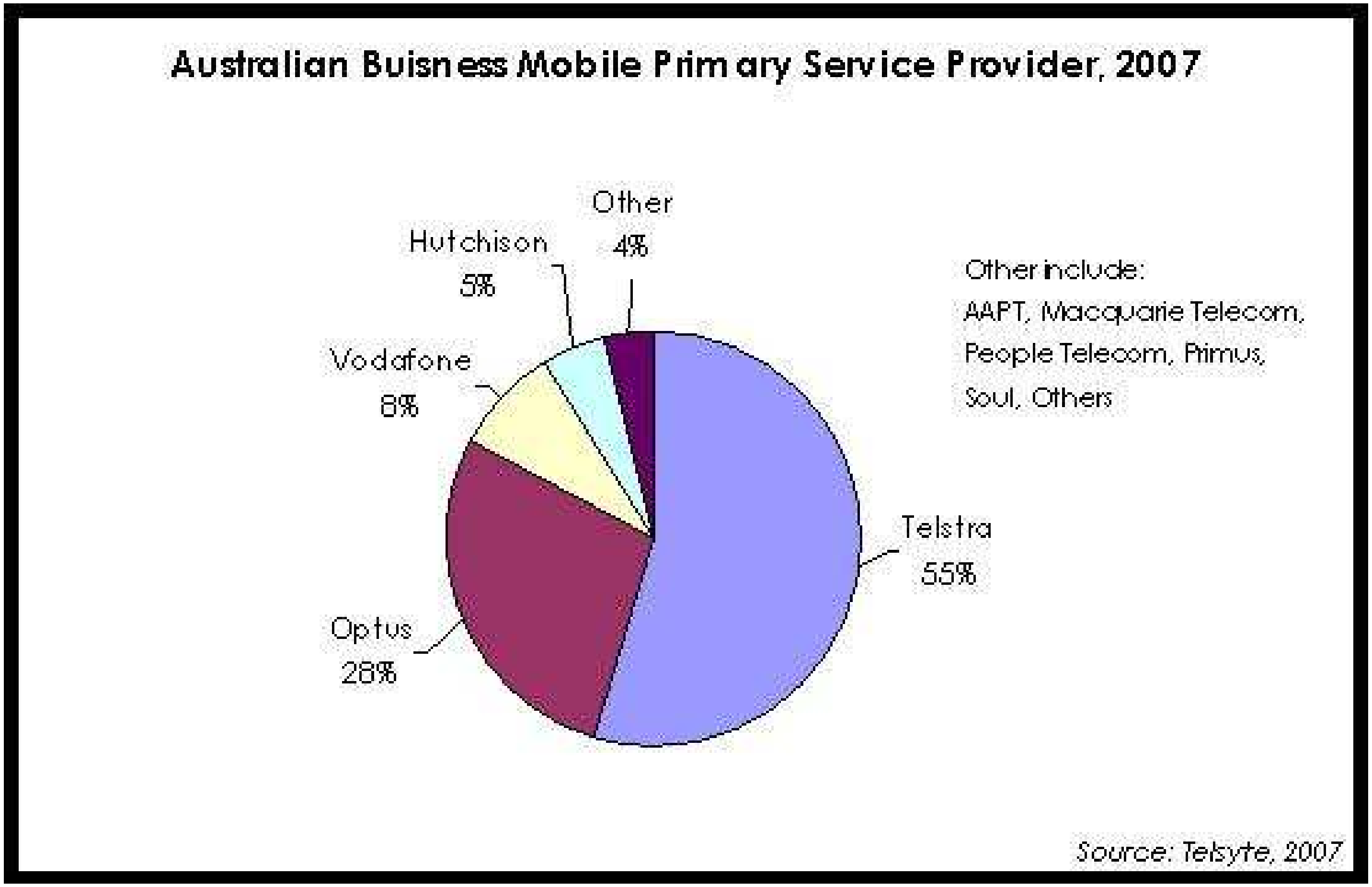


Revenue

- 13% growth YoY
- 3G share = 31%
- Non-voice share = 25%
- ARPU = $40.8
- Hutch – fastest growing 52% YoY

GQ·AAS GIBSON QUAI-AAS CONSULTING

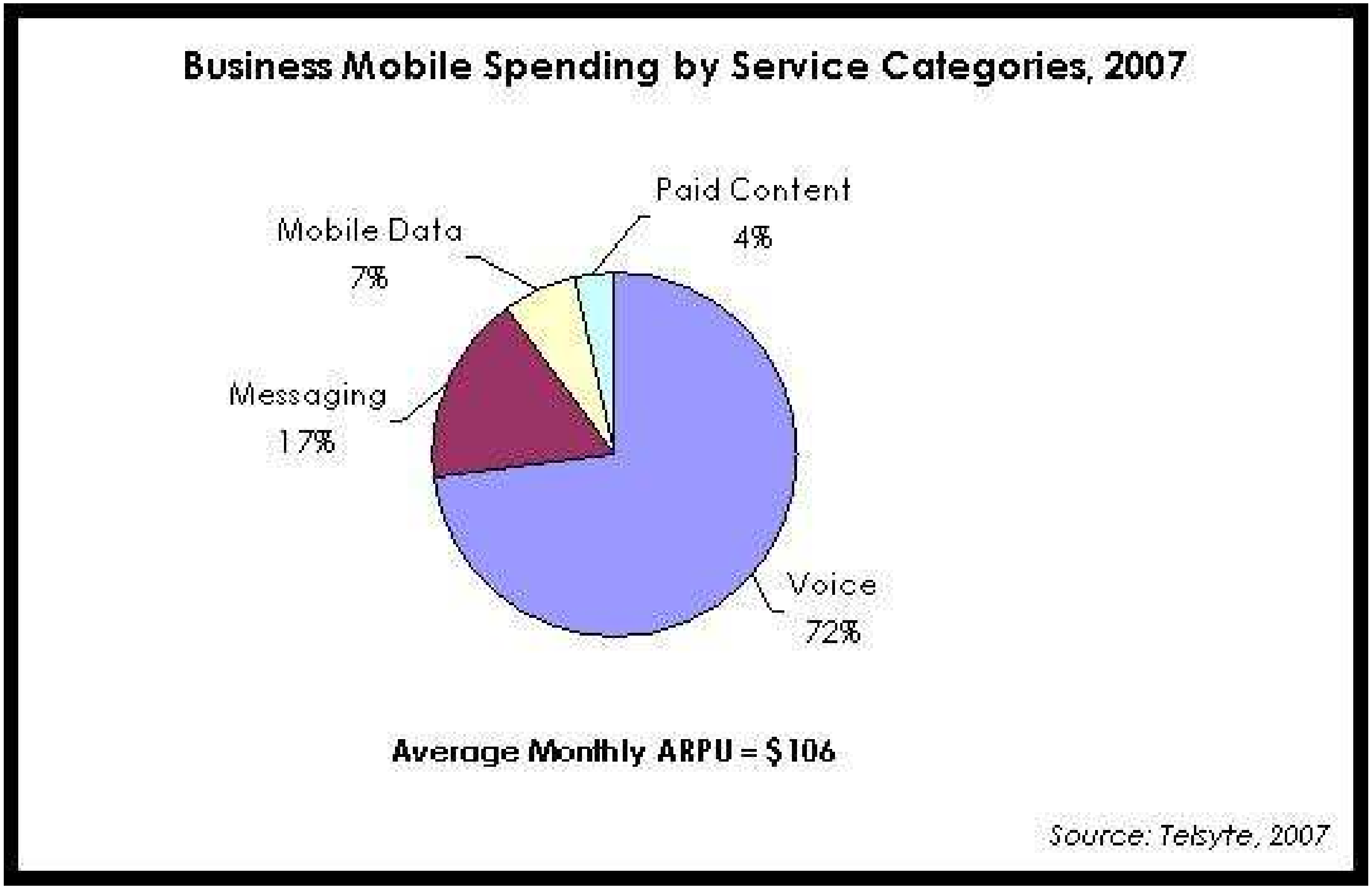
Business Mobile Carrier Preferences



- Telstra particularly strong in WA & NT, QLD and ACT; Govt, Primary, Health, Transport & Utilities
- Telstra preference strong across all business sizes
- Optus particularly strong in NSW and VIC; Retail & Wholesale, Financial, Transport & Utilities
- Optus preference rises with business size
- Vodafone and Hutchison particularly strong in SOHO and small businesses

GQ·AAS GIBSON QUAI-AAS CONSULTING

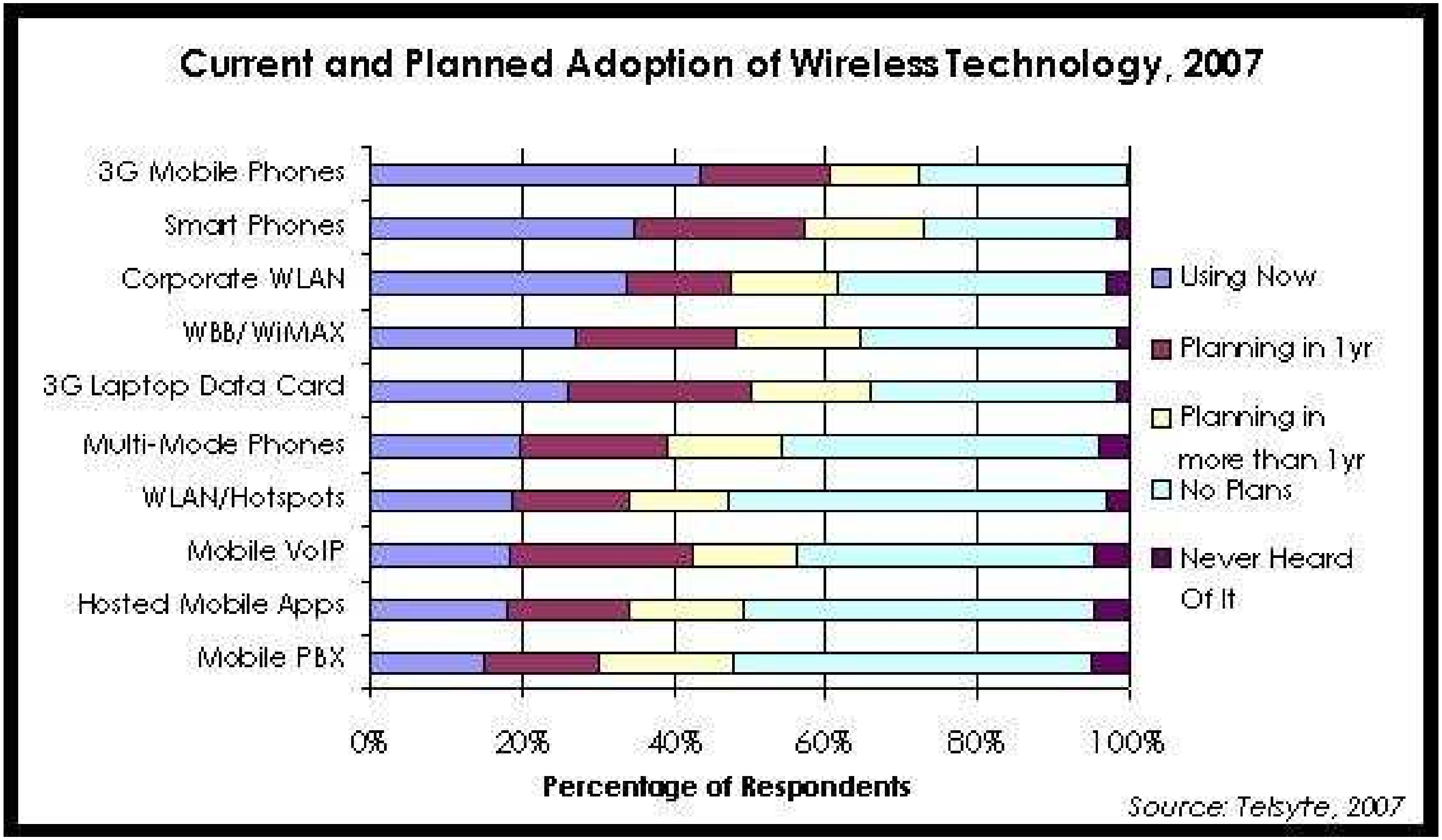
Business Mobile Spending



- ARPU grows with business size from $80 in Small/SOHO to $140 in Large/Corp
- Total non-voice and mobile data for Large/Corp as high as 1/3 and 12%

GQ·AAS
GIBSON QUAI-AAS CONSULTING

Mobile Technology Adoptions

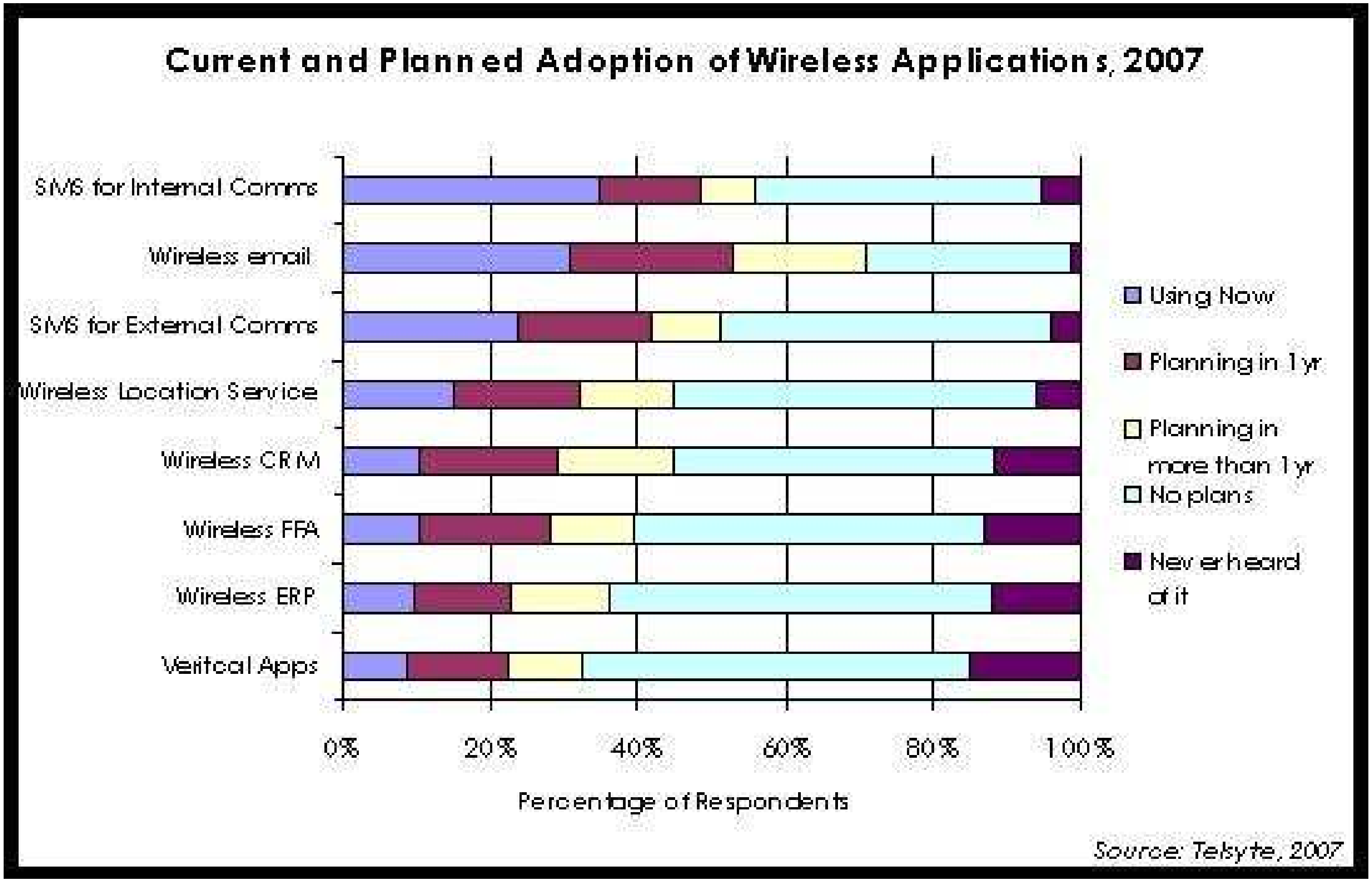


GQ·AAS
GIBSON QUAI-AAS CONSULTING

Mobile Application Adoptions

1st Wave

2nd Wave



- Telecom & media; government; financial services; professional services

Business Mobile Drivers & Inhibitors

Drivers

- Improve communications
- Increase productivity
- Cut costs through efficiency
- Customer service
- Increase revenue
- Enhance competitiveness

Internally driven

We’re here

Externally driven

Inhibitors

- Cost / ROI / business case
- Evolving technologies & standards
- Business process integration (ICT alignment & translating business needs into tech req’s)
- IT systems integration

GIBSON QUAI-AAS CONSULTING

Contact Us

Warren Chaisatien

wchaisatien@telsyte.com.au

(02) 8297 4651

Visit Us at

www.telsyte.com.au

For COMPLIMENTARY

Monthly Graph Downloads

GQ·AAS
GIBSON QUAI-AAS
CONSULTING