

3 Like Home

Elasticity of Demand of
International Roaming
Services

Vienna, 07.05.2008



3 Like Home - Overview



- Launch in January 2007
- No roaming charges in 3networks of 3 Like Home countries Australia, Denmark, Hongkong, Ireland, Italy, Sweden, Uk; same conditions as at home (same charges, packages, bundles etc. for telephony, SMS and data usage)
- Available for all 3customers, no separate registration necessary
- Final customer prices (excl. VAT) in 3networks before launch of 3 Like Home
 - Voice: 0,41 Euro/MOC min
 - PS: 2,5 Euro/MB

Data Presented

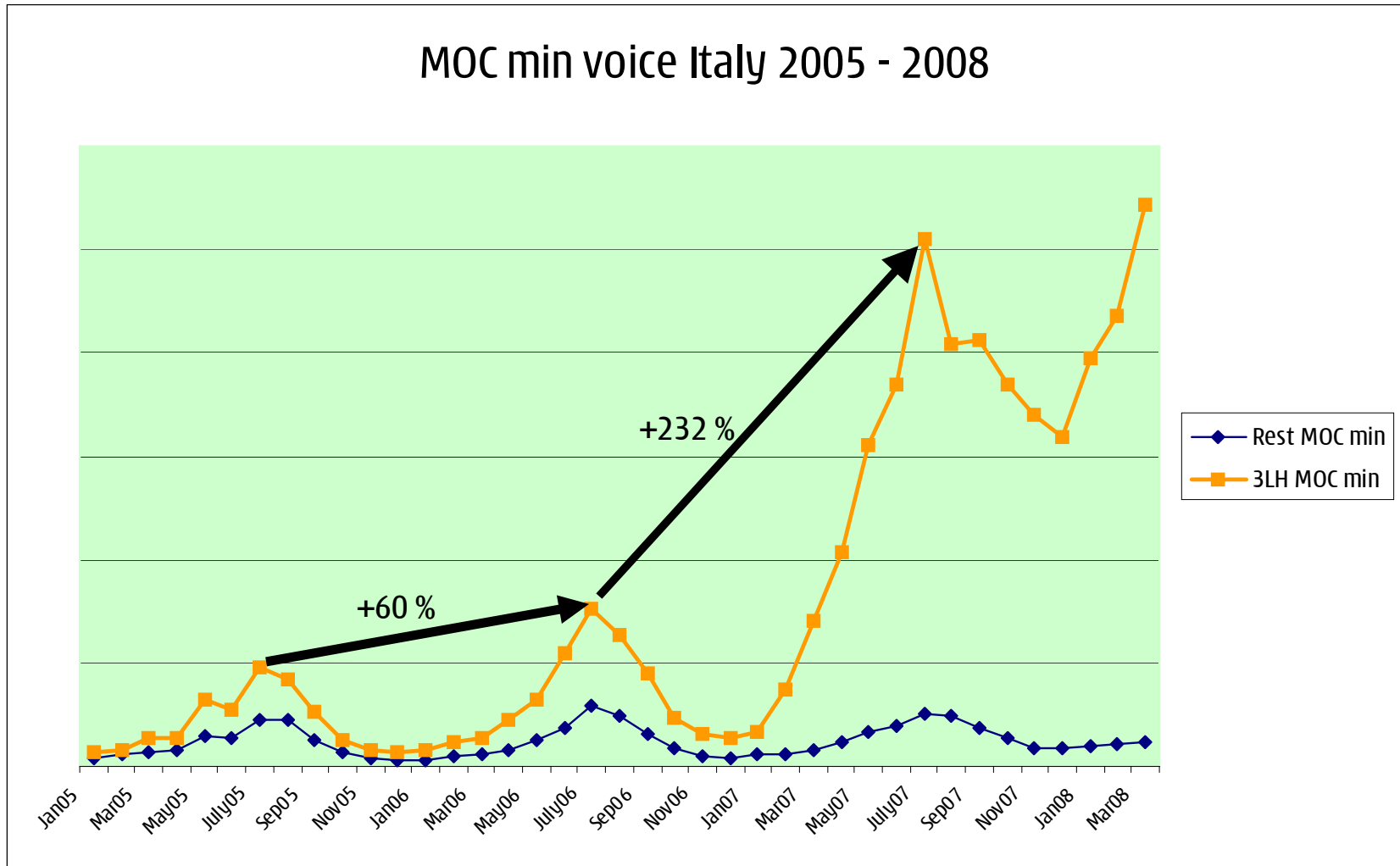


- Traffic figures from January 2005 to March 2008
- Voice & Data
 - Italy/UK vs. Germany/EU
 - 3 Like Home traffic share compared to total roaming traffic
- NO Inbound Roaming
 - Due to a limited no. of partners & traffic

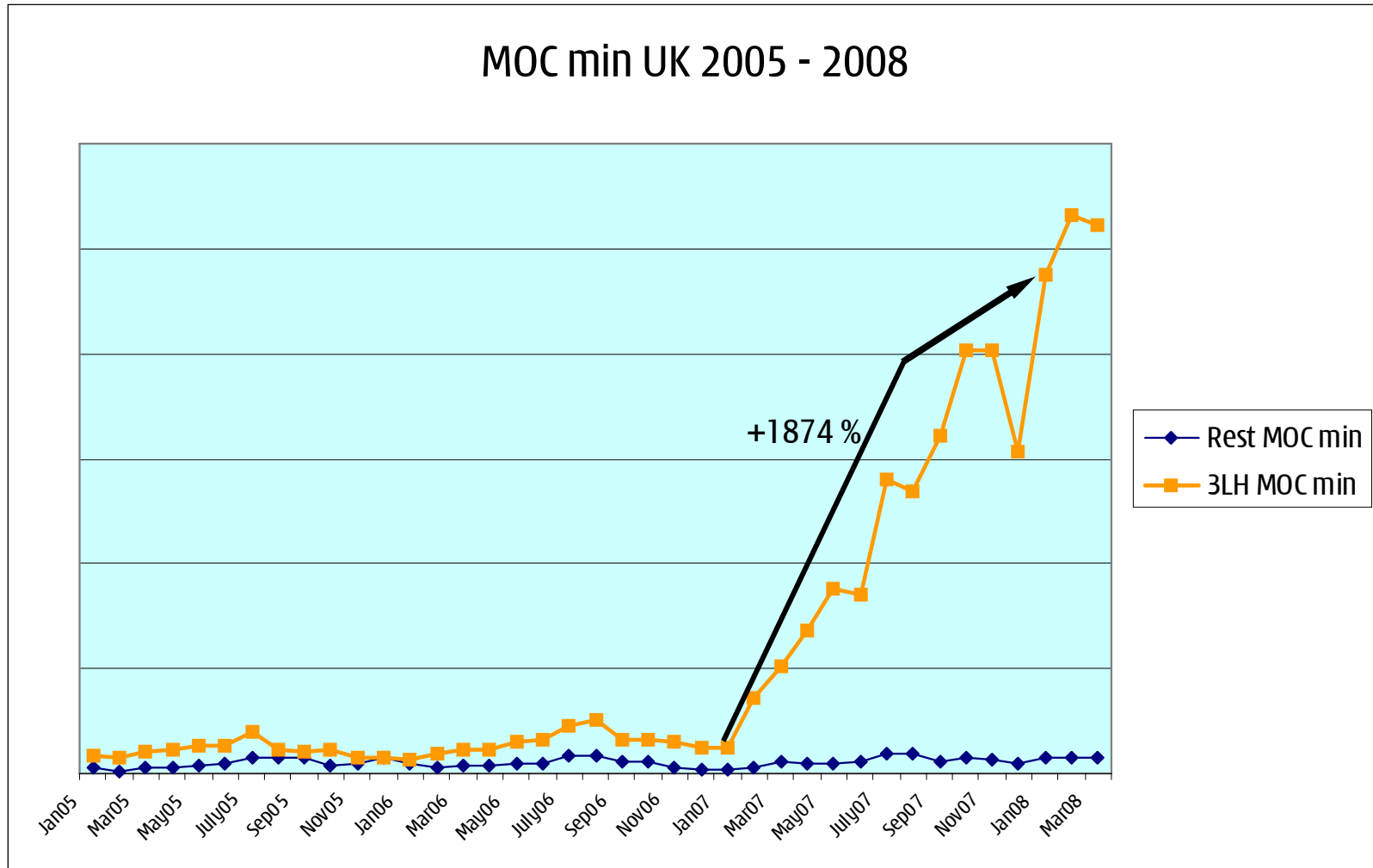
Voice Roaming Italy



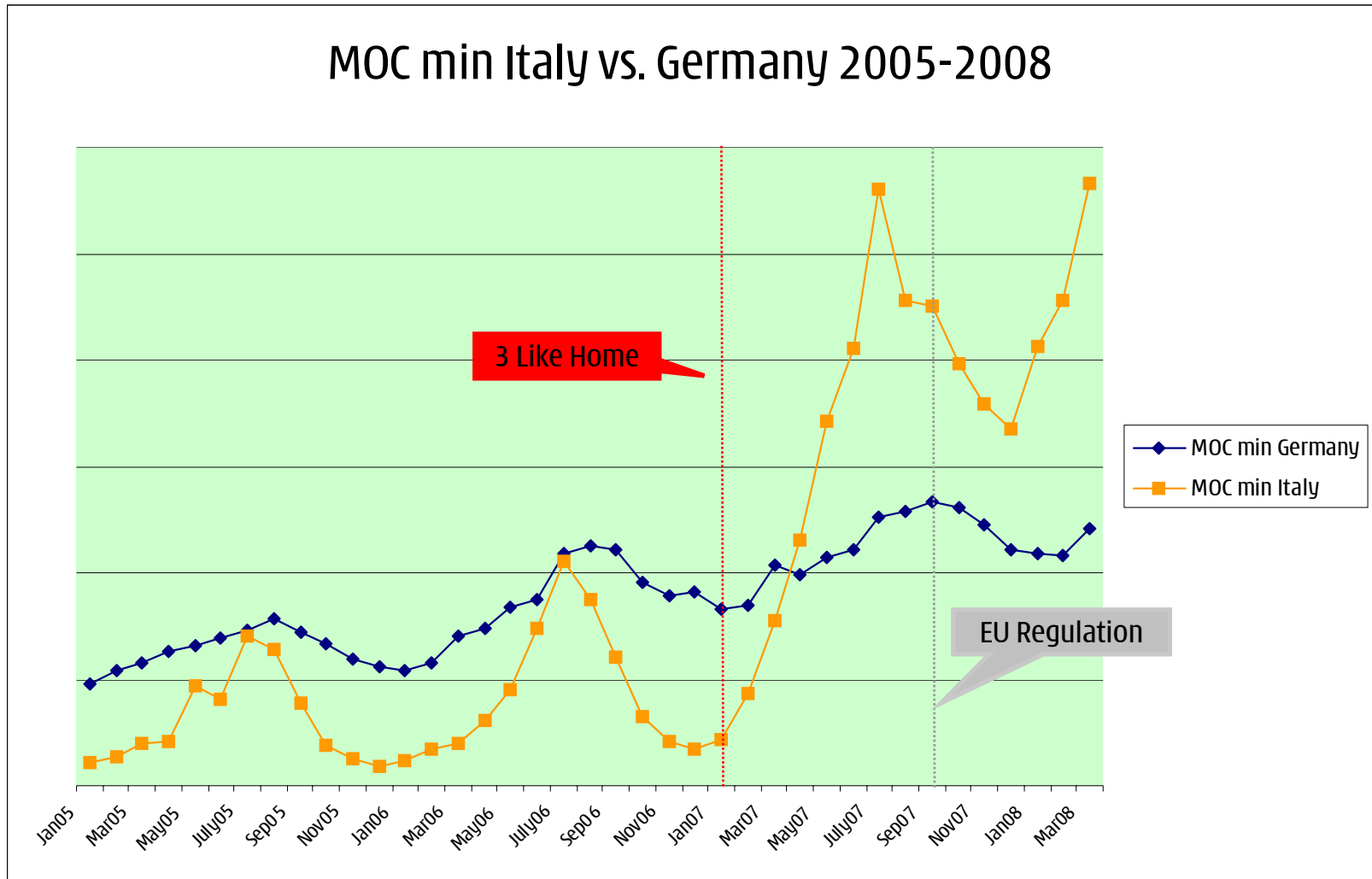
MOC min voice Italy 2005 - 2008



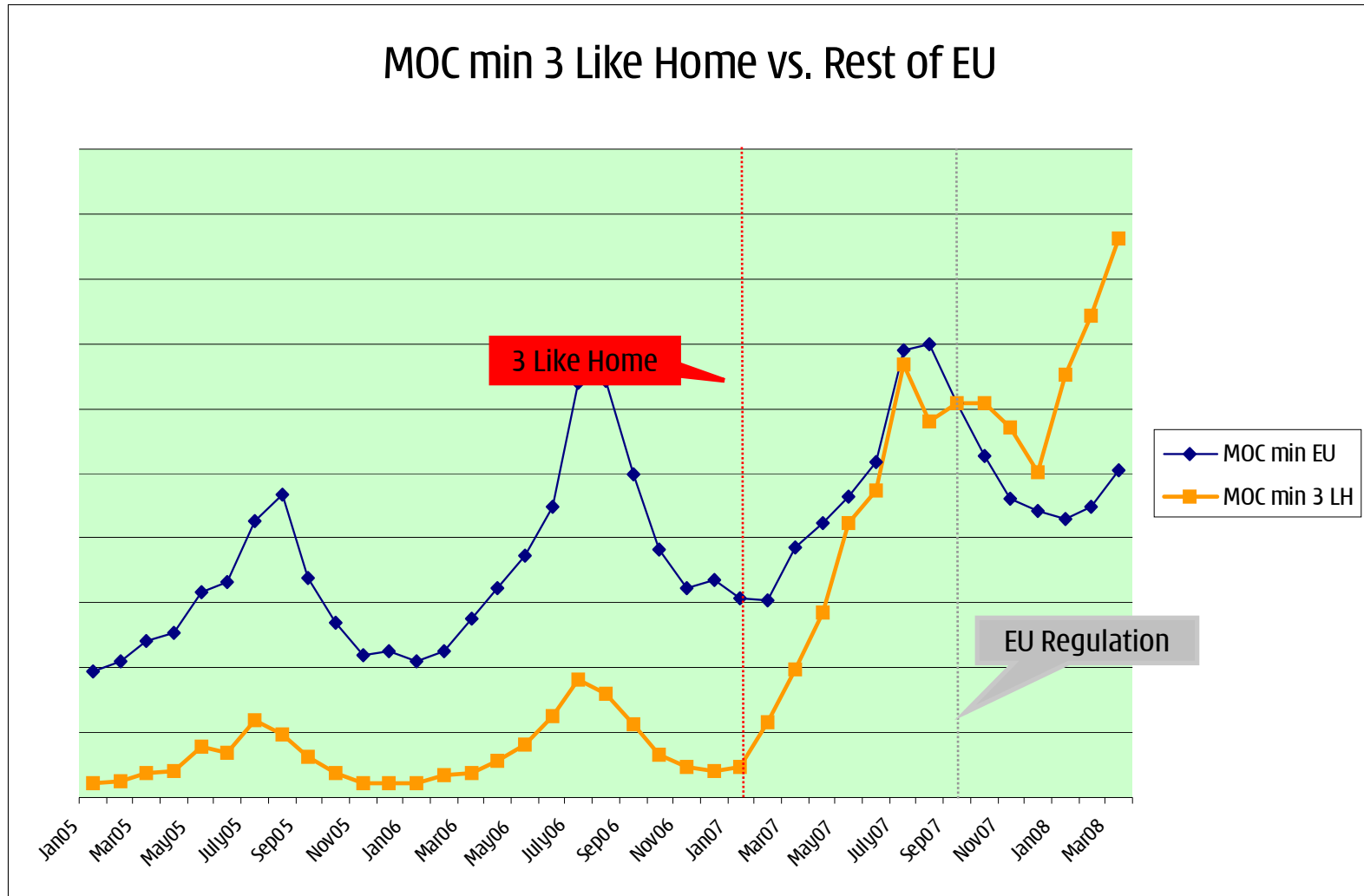
Voice Roaming UK



Voice Roaming Italy vs. Germany

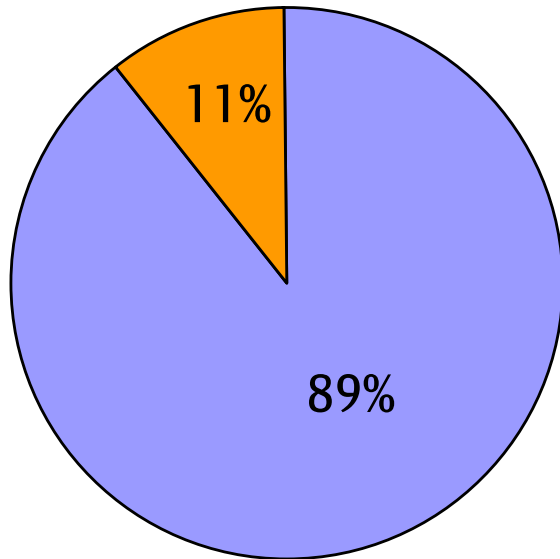


Voice Roaming 3 Like Home vs. Rest of EU



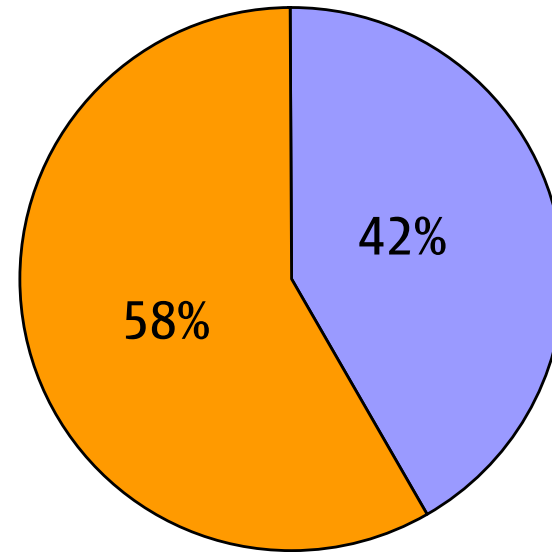
3 Like Home as part of Total Voice Roaming

Total MOC min March 2005



Rest MOC min 3LH MOC min

Total MOC min March 2008



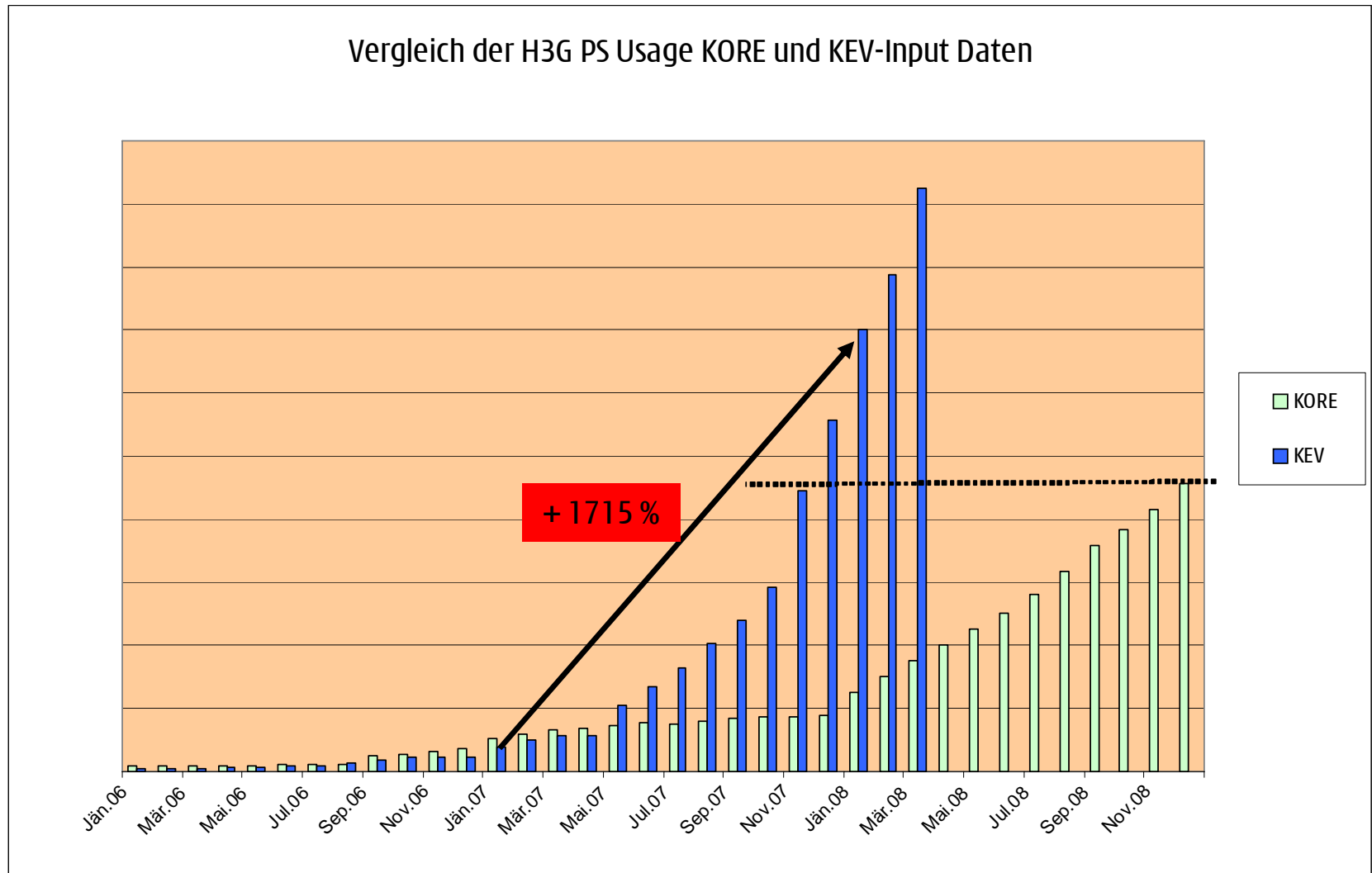
Rest MOC min 3LH MOC min

Conclusions Voice Roaming

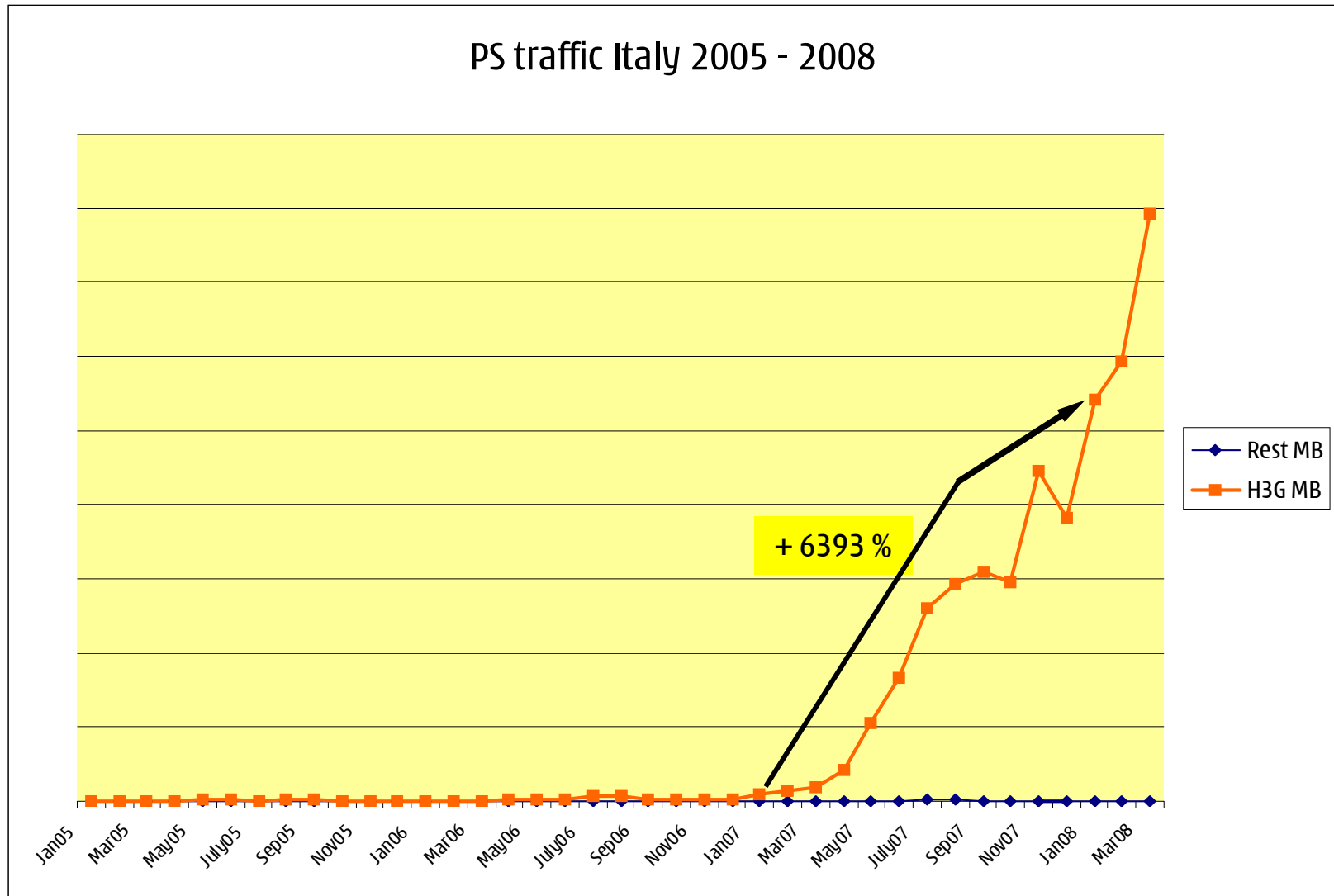


- MOC traffic multiplication in 3-Like-Home networks
- Effects of EU voice regulation not yet visible
- 3-Like-Home traffic share exceeds even rest of total voice roaming traffic now

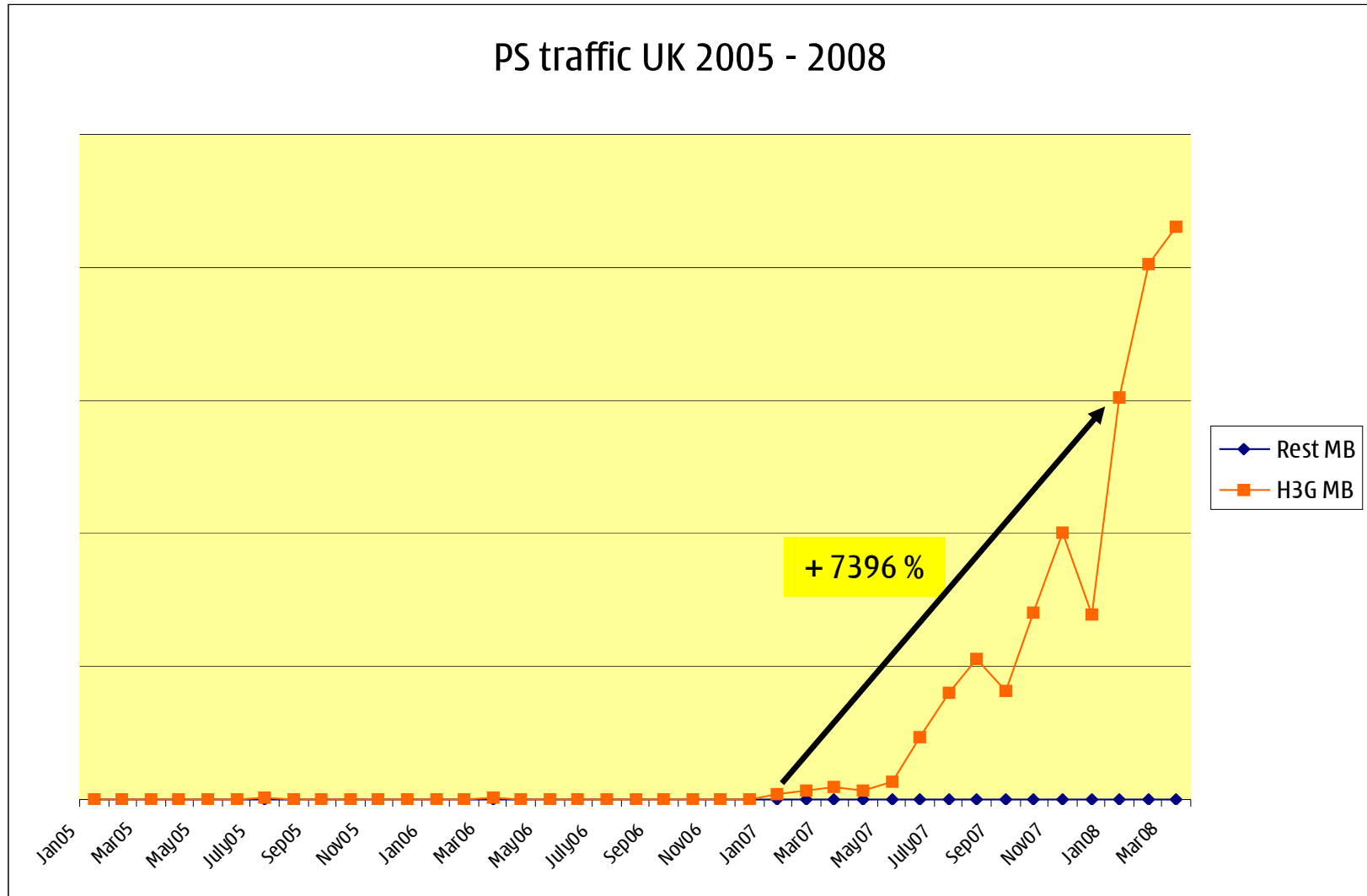
Development of PS Traffic in Austria



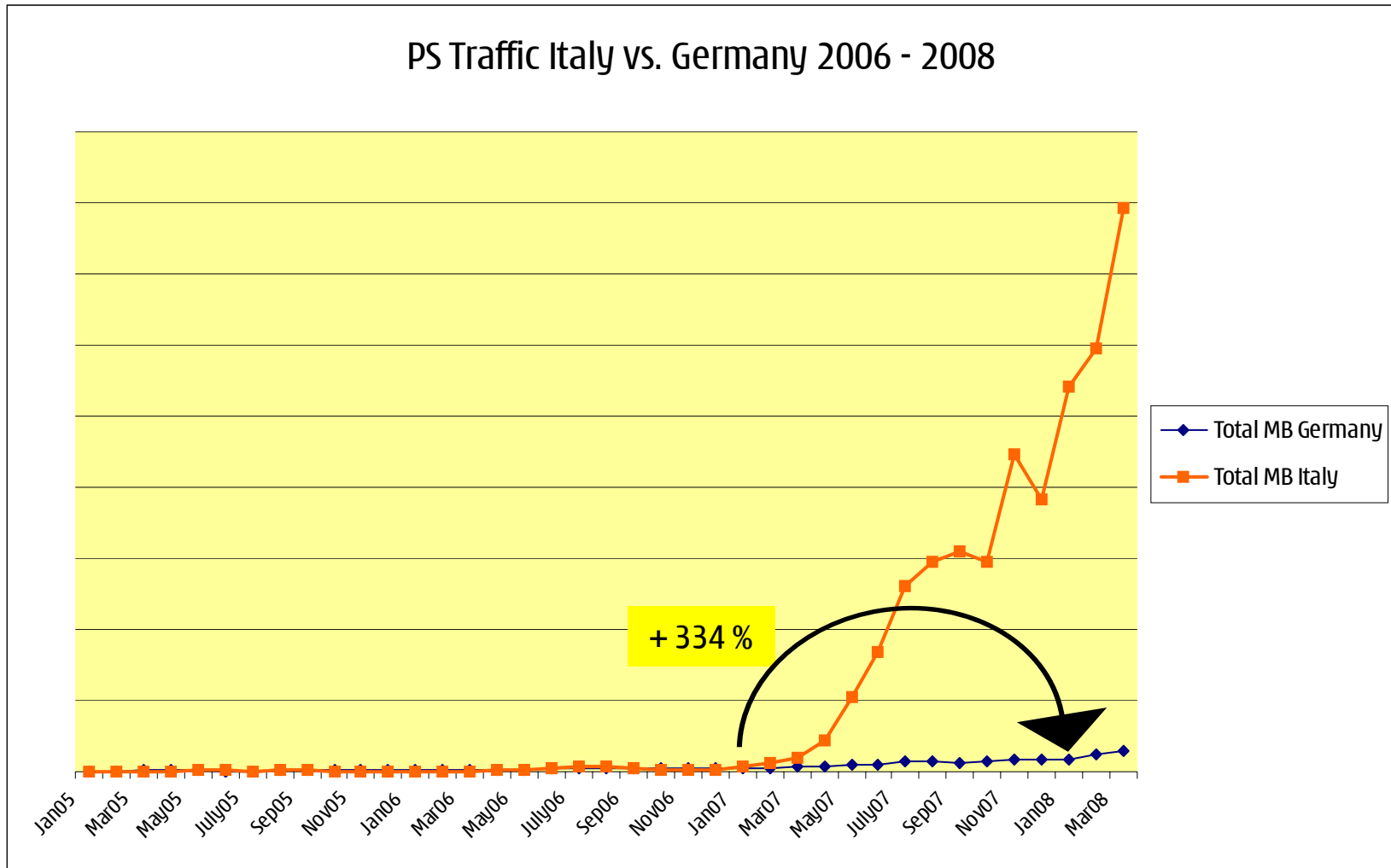
PS Roaming Italy



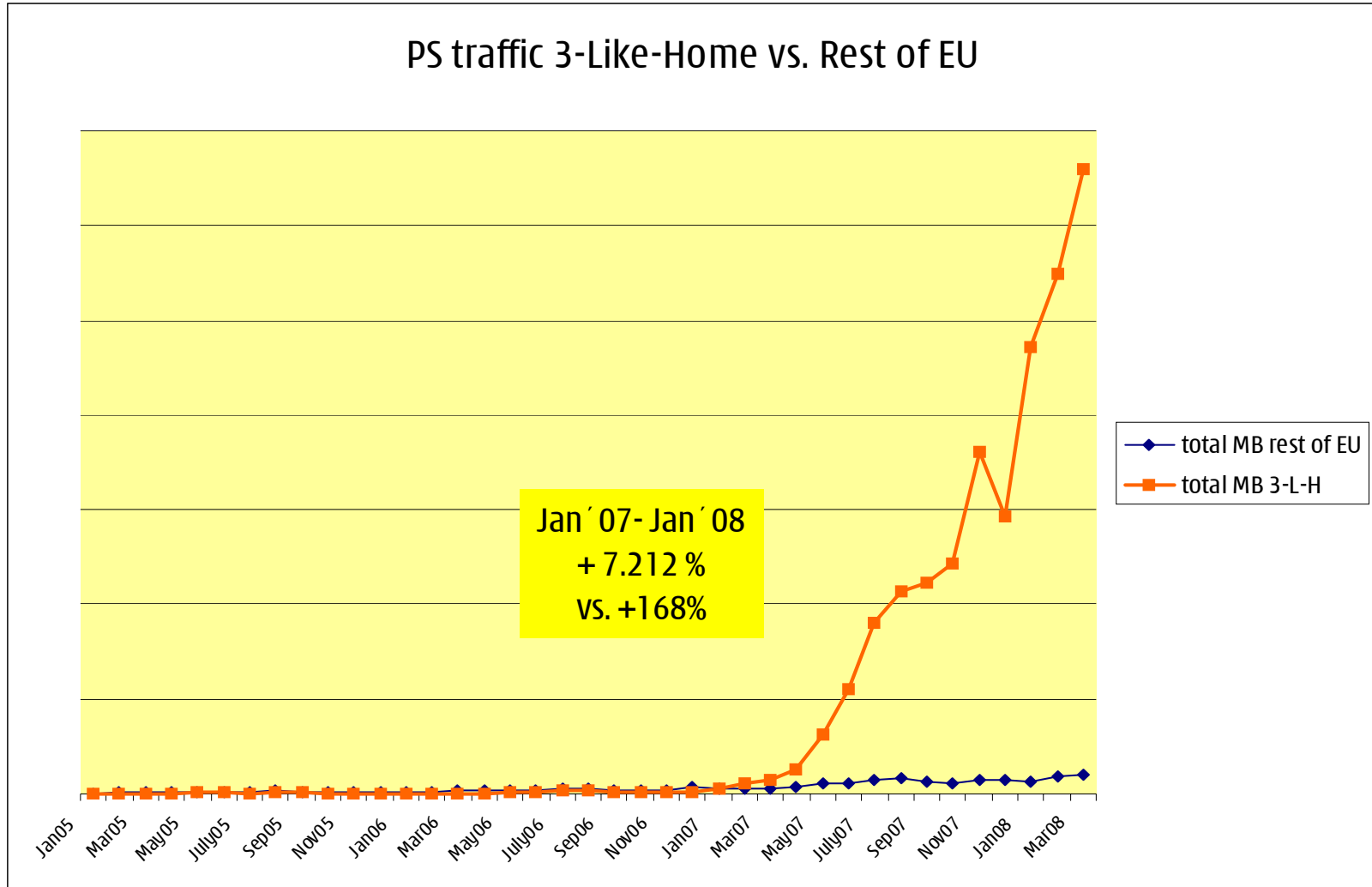
PS Roaming UK



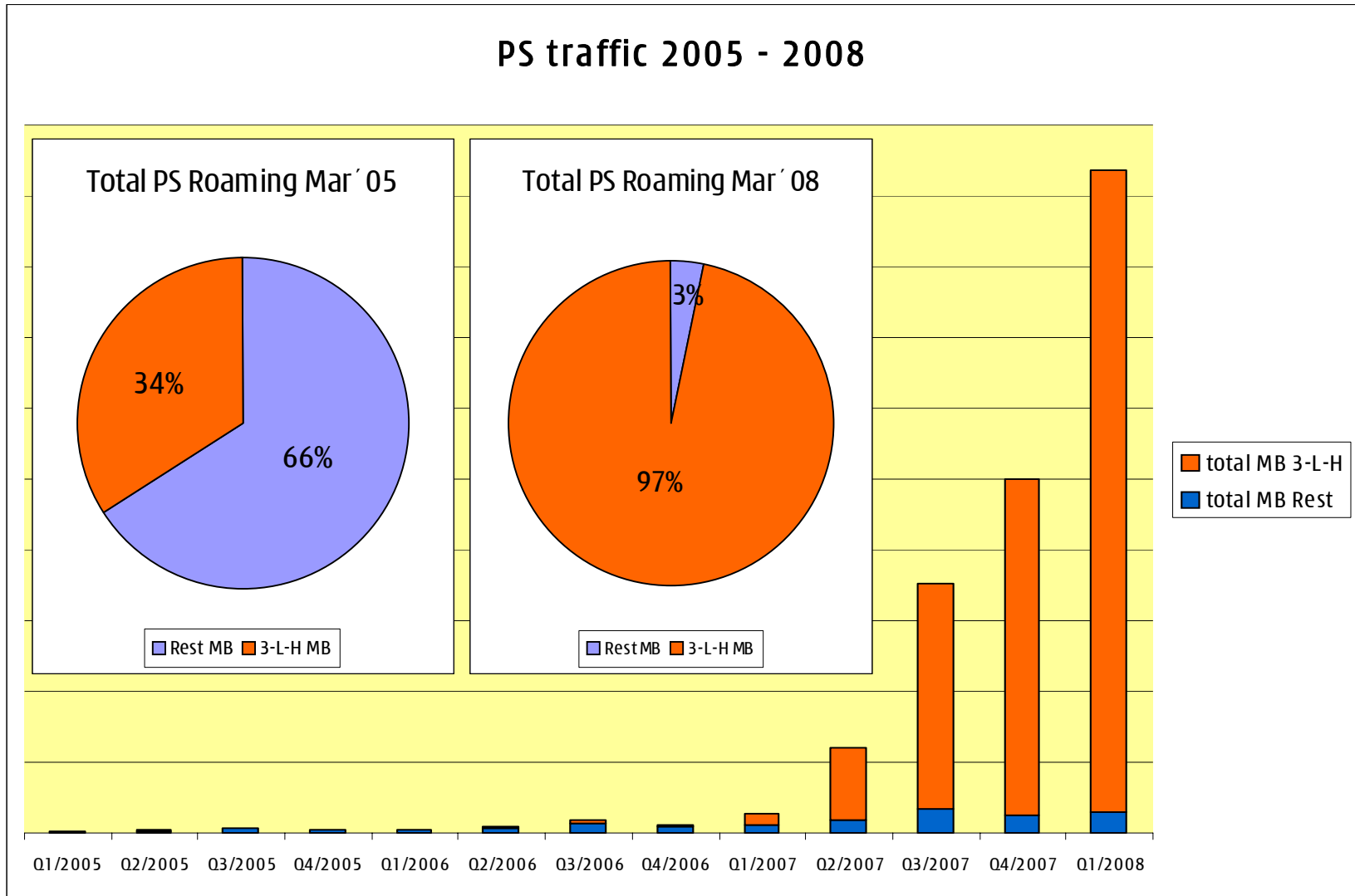
PS Roaming Italy vs. Germany



PS Roaming 3 Like Home vs. Rest of EU



Total PS Roaming Traffic



Conclusions PS Roaming



- Broadband Data offers lead to an exponential growth of PS traffic in Austria
- Exponential growth of PS Roaming traffic in 3-Like-Home networks
- „Growth“ of PS traffic in Roaming networks falls back significantly

High WS International Roaming Charges clearly inhibit the development of an EU Market for Mobile Broadband Services

Thank you.

