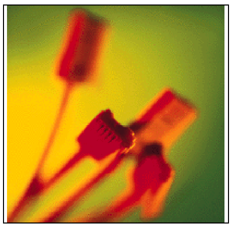
TELECOM SERVICES REPORT

Telecom Service Provider Market in the EMEA Region



Brand Tracking Study

REPORT HIGHLIGHTS

OVERVIEW

ITSMA's *Telecom Service Provider Market in the EMEA Region Brand Tracking Study* focuses on network rollout and support services and network professional services, providing a detailed analysis of how IT and business executives assess leading network services firms and the market as a whole. In particular, the report:

- Establishes a baseline of brand awareness and equity for network services firms
- Provides insight into brand awareness and positioning for leading market participants and study sponsors
- Explores the market and competitive positioning of the study sponsors and other leading network services firms
- Generates insight regarding key customer purchase criteria for networking services
- Establishes the sources of information used by decision makers and influencers of network services purchases
- Assists network services firms to develop ongoing differentiation strategies
- Assists in refining these strategies for the three EMEA subregions: Western Europe, Central & Eastern Europe, and MEA/Central Asia

KEY TRENDS

Some of the major trends highlighted in this report include:

Market opportunity. No provider can lay claim to "owning" the EMEA market, although Cisco does enjoy some advantage. Many smaller players are stepping up to establish market share in B2B niche areas.

Buyer goals. Buyer priorities for purchasing services from outside vendors are clear: improve profitability, reduce costs, and generate new revenue, in that order. Suppliers who can translate these priorities into compelling value propositions will be in an excellent position.

Customer priorities for the supplier selection process. The three most important network services firm attributes deal with delivering on promised service levels, understanding the customer's business needs, and employing the best skilled professionals.

Marketing opportunity. Buyers of network services rely on the recommendations of their peers. Investing in strengthening relationships with existing customers and third-party influencers will result in the ability to maximize sales opportunities in new and existing accounts.

(Continued)

ITSMA Europe ■ 8 Mount Ephraim ■ Tunbridge Wells Kent ■ TN4 8AS United Kingdom
Phone: [44] 1892 523060 ■ Fax: [44] 1892 522096 ■ Email: info@itsma.com ■ Internet: www.ITSMA.com

STUDY METHODOLOGY

In 2005, ITSMA conducted 301 telephone interviews with EMEA-based senior IT/network and business executives involved or influential in the purchase of telecom services. (Only companies that had plans to purchase network services from outside companies in the next 12 months and were active in Western European, Central, and Eastern European countries or in Middle Eastern or African or Central Asian countries were deemed eligible to be interviewed.) Study questions were designed to assess the brand awareness and market positioning of the major industry services firms.

The sponsors of this study included Ericsson, Lucent Technologies, and Nokia. Each of the sponsors had an opportunity to shape the general survey instrument. In addition, primary sponsors each drafted up to three questions specific to their market focus or competitive positioning, to be included in the final survey. Responses to these questions are confidential.

To enhance participation, a donation was made in the name of the respondent pool to UNICEF, the United Nations Children's Fund.

COMPANIES COVERED

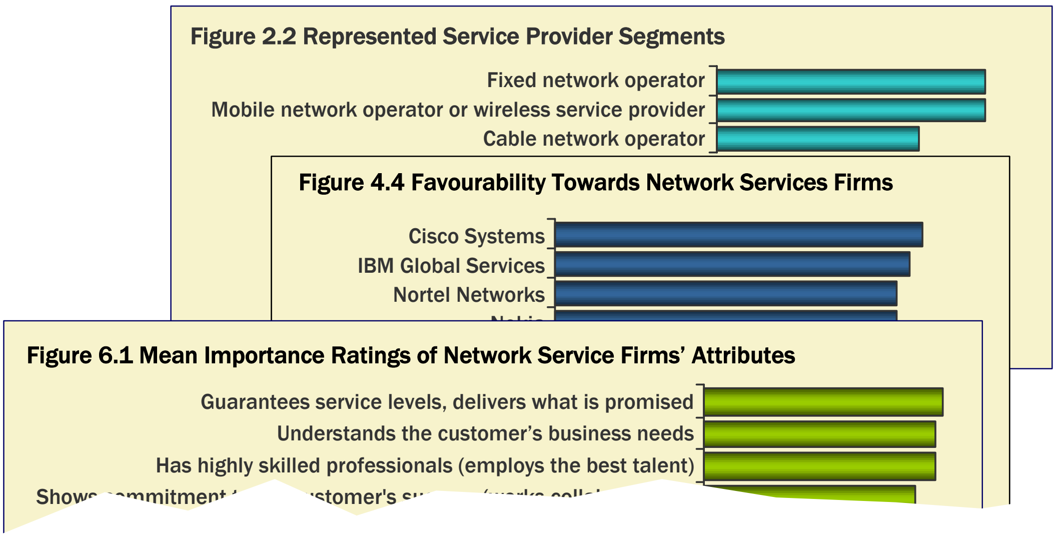
Companies covered in the study include 3Com, Accenture, Alcatel, AT&T, Belgacom, BT Global Services, Capgemini, Cisco Systems, COLT Telecom, Dell, Deutsche Telekom, EDS, Equant, Ericsson, Flextronics, France Telecom, Fujitsu, Hewlett-Packard, Huawei, IBM Global Services, Italtel, Juniper, KPMG, KPN, LINKdotNET, Lucent, MCI WorldCom, Nokia, Nortel Networks, Siemens, Sun Microsystems, TDC, Telecom Italia, Telenor, Telindus, and Vodafone.

RESPONDENT DEMOGRAPHICS

Geographic Region	
Western Europe	58.1%
Central and Eastern Europe	30.9%
Middle East/ Africa /Central Asia	11.0%
Primary Service Provider Segment	
Fixed Network Operator	38.9%
Mobile Network Operator/ Wireless Service Provider	38.9%
Cable Network Operator	22.2%
Subscriber Base (Worldwide)	
Fewer than 50K	12.6%
50–100K	52.2%
100K–1M	16.6%
1–5M	8.3%
5–10M	2.0%
10M+	8.3%
Respondent Titles	
Vice Presidents and C-level Executives	16.2%
Directors	32.6%
Managers	51.2%
Respondent Job Function	
Business Management	46.5%
Technical/Network Management	53.5%

MORE INFORMATION

To learn more about the report, contact Michael Longy, Research Business Development Director, ITSMA Europe, at [44] (0) 7753 684 781 or mlongy@itsma.com.



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ITSMA Europe ■ 8 Mount Ephraim ■ Tunbridge Wells Kent ■ TN4 8AS United Kingdom
Phone: [44] 1892 523060 ■ Fax: [44] 1892 522096 ■ Email: info@itsma.com ■ Internet: www.ITSMA.com

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