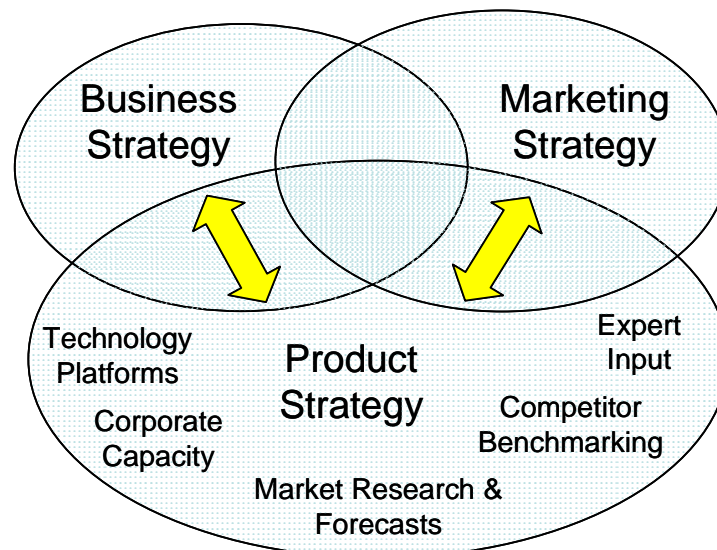


MOBILE OPERATORS – PRODUCT STRATEGY

The product portfolio is at the heart of the Mobile Network Operator (MNO) and is driven by business and marketing strategies. The need to introduce new products to develop the business is tempered by a number of complications including the range of required technical and human resources that any new product demands and understanding the real value to the business.

The quest, for the MNO, is to determine the most attractive products to launch. The process needs to be analytic to ensure the quality of the result, drive the business forward in its target markets and with its financial objectives, make most productive use of resources throughout the MNO's business and constitute a sufficient return on investment. The product portfolio strategy process, which is used for this purpose, needs to be driven by the MNO's business and marketing strategies and will, in turn, provide valuable feedback to them.

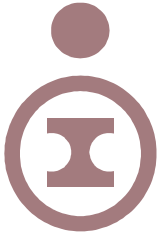


We are offering a 2 day workshop, for product and marketing management, which will address this strategic area for MNOs. The scope of the workshop and the matters it will address are outlined here.

What are the aims of product strategy?

The development process for new products needs to be set in the context of the exploitation of the opportunities available to the MNO and has to be consistent with the MNO's business and marketing strategies.

- We will set the scene by leading discussion on the basic factors including addressable markets, the existing and potential capacities of the MNO, and the competitive and regulatory environments. These factors will be the subject of input from business and marketing strategies.



How does the marketing strategy drive the focus on product opportunities?

The marketing strategy is central to the development of the business. It has a substantial bearing on the product portfolio. Understanding the market in analytical terms provides valuable input to product development. This process can be used to provide feedback to the marketing strategy.

- We will explore the marketing strategy from an overall perspective and establish how this characterises the MNO. We will then use this work in further detail to provide a filter and focus on product opportunities

What are the product capacity and competitive strengths of the MNO?

Understanding the capacity of the MNO is essential to determine what new products it is capable of supporting. This needs to take into account a number of factors including markets, technology, processes and the cost base. These factors need to be considered with respect to competitors also. The environment, including socio economic aspects, needs to be understood in the quest for determining what the MNO is capable of delivering.

- We will, based on internal and market research information, illustrate the analysis of these internal and external factors, competitor data and environmental aspects to provide a market focus and product opportunities.

What are the top products for the market segments addressed?

A range of candidate products for short to long term market needs has to be identified and analysed in relation to a number of internal and external factors and with particular reference to their attractiveness to the market segments to be addressed.

- Building on the market and capacity analyses, we will explore the process of establishing a long list of products, then sifting the winners from the losers and examining their potential for short or long term launch. The outcome of this will be a list of candidate products to be refined subsequently by the product management team. We will outline the product related market evaluation process which is based on a number of factors including marketing strategy, market research & forecasts, technology platforms, competitor benchmarking, expert input and corporate capacity.

What is the value of product opportunities in customer and MNO terms?

A set of new products has to be viewed in a financial context and the return on investment needs to be determined with granularity and confidence. In other words, any new product needs to be supported by a sound business case. This needs to determine the value proposition to the customer and the MNO and whether it is sufficiently attractive to meet the related traffic forecast.

- We will lead discussion on the ability of products to deliver value to the customer. We will outline the business case model that needs to represent all relevant organisational and technology items including customer and MNO value propositions, time to market and tariffs. The model has to enable sound financial planning and determine ROI from customer and MNO perspectives