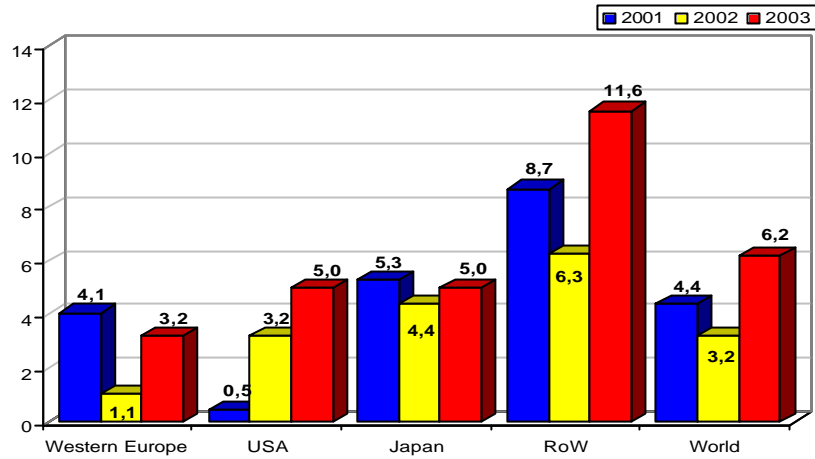
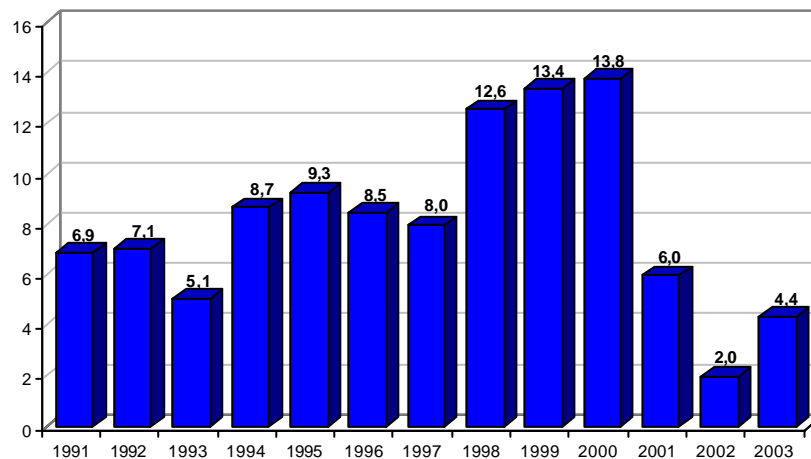


World-wide ICT markets annual growth by region, 2001-2003, in %



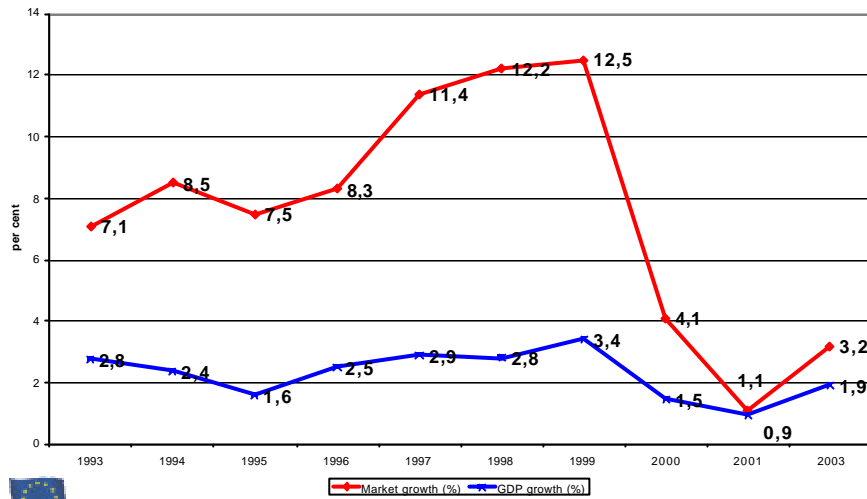
Source: EITO Update, October 2002

Western European TLC market annual growth, 1991-2003, in %



Source: EITO Update, October 2002

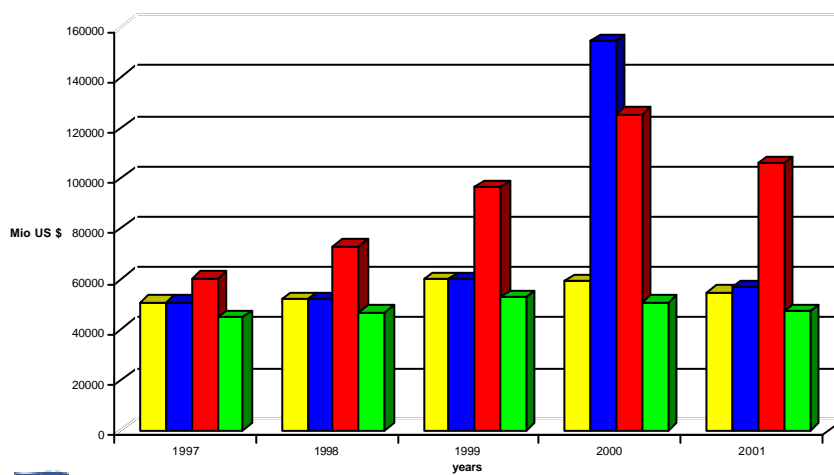
Western European ICT-Market: Market growth vs. GDP growth 1994-2003



Source: EITO Update, October 2002, European Commission

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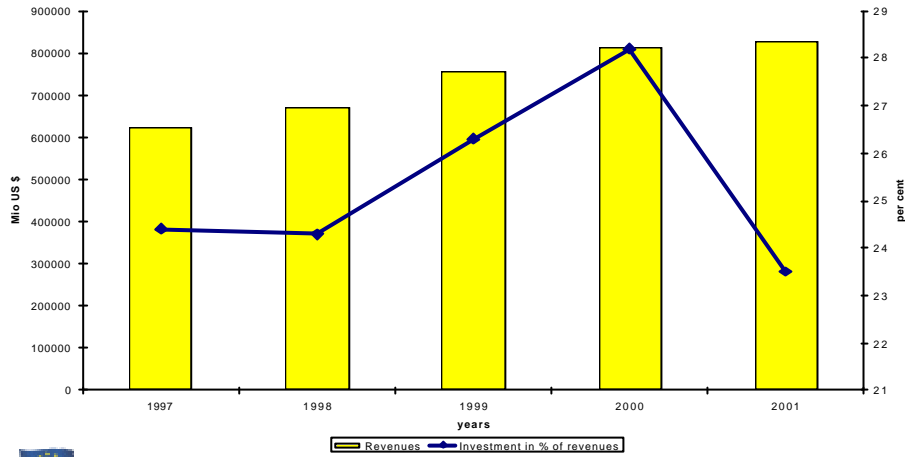
Telecommunication investment by region, OECD 1997-2001



Legend: Europe, Europe incl. wireless spectrum, North America, Asia Pacific

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Investment as percentage of revenues OECD area, 1997-2001



Outlook 2003 and beyond

- Expected revenues for 2003 875 billion USD - a decline of 2,3% world-wide
- 2003 - overall growth of 5,8%
- World-wide: improve over several years, downsize at end of decade
- Latin America - double digit growth through to 2006

(Source IDC, November 2002)

