

# Structuring for Growth

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## Changing consumer behavior takes time



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## Status of today's mobile services market

From SMS to emerging advanced services

### Mass market today

SMS, ringtones and logos



- Approx **1 billion SMS** / day globally
- Mobile ring tones are already a **multi-billion USD** business
- UK ring tones market will **overtake the CDs singles** market in 2003

### Early phases

Browsing and application downloading



- UK: WAP page impressions **trebled last 12 month**
- Over **75 operators** have launched **mobile Java™** services globally
- About **10 million mobile Java** downloads globally / month in June 2003

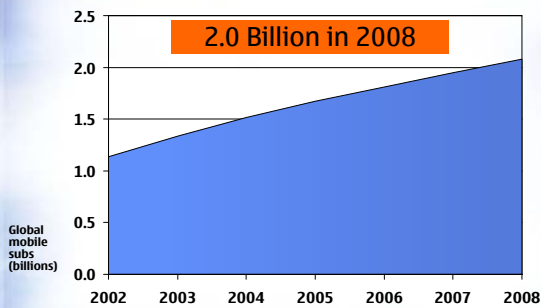
MMS and video services



- Almost **170 operators** globally have launched **MMS** (Nov 2003)
- 1H/03 camera handset shipments (25M) **overtake digital camera** shipments (20M)
- Over **20 operators** launched **video services** (MMS, streaming)

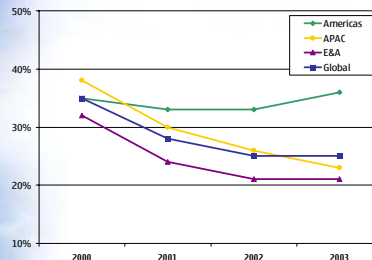
Source: Public sources; Press releases; Strategy analytics, MDA; Forbes; Mobile Media

## Opportunity to Double Global Mobile Subscriptions

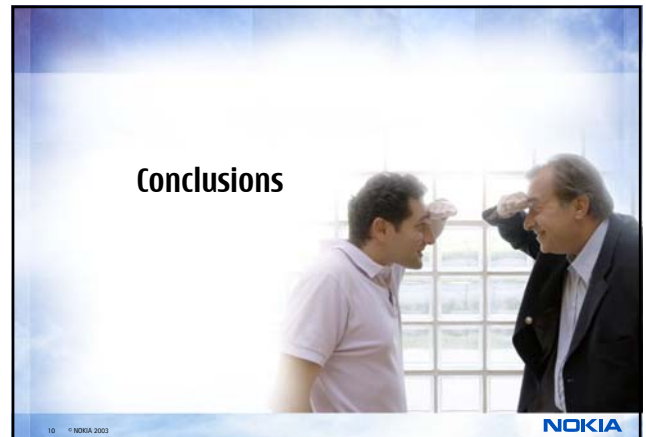
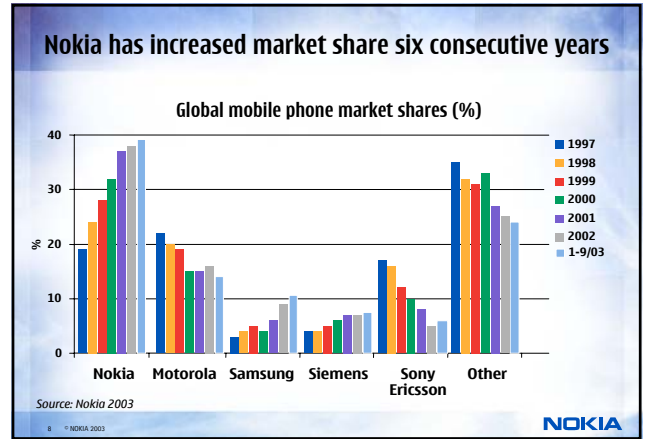
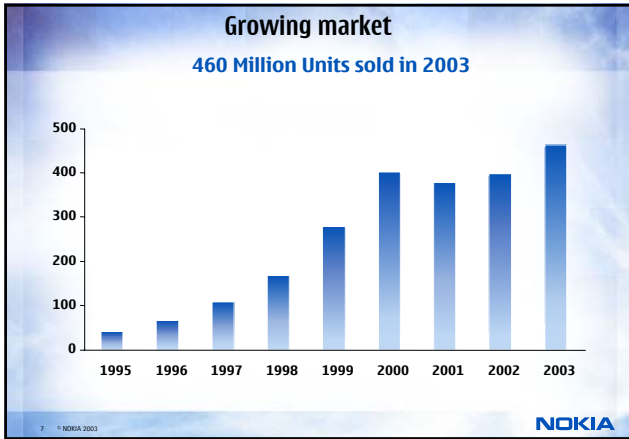


## Replacement Market

Percentage of mobile phone owners replacing their phone



Renewal rate is recovering: 25% of mobile phone owners will replace their phones in 2003



### Total 2003 Addressable Market Size: over EUR 200 billion

Voice Optimized Devices	Imaging	Games	Media	Enterprise	Mobile Networks
Total 2003 Market Size (EUR B)					
60	25	30	~ 1	60	30
Nokia Market Share Estimate 2003					
Close to 40%	~ 10%	Negligible	<1%	~ 2%	>15%

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