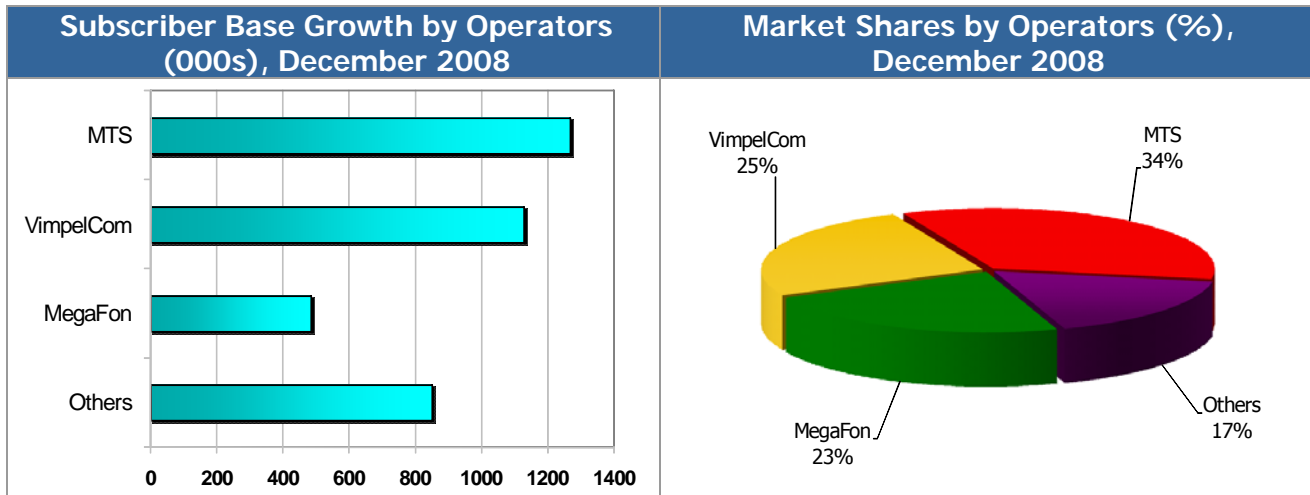


# Cellular Market Watch Russia December 2008

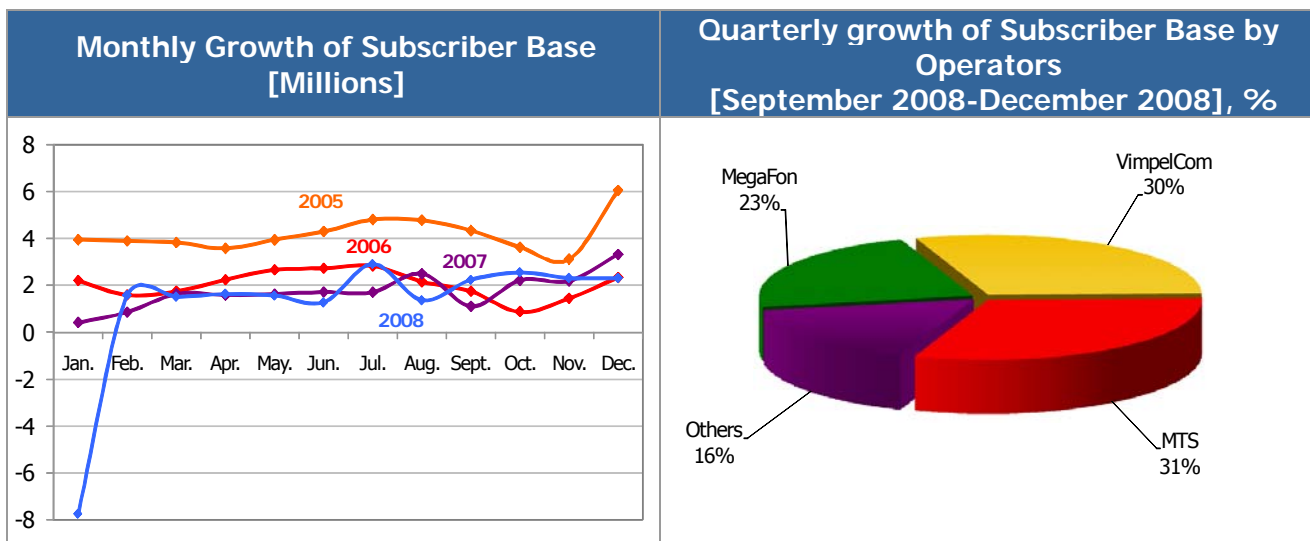
**Statistics:** In December number of cellular subscribers [sim-cards] in Russia reached **187.5 mln** with **132%** penetration level in the country and **184.5%** in the Moscow Licensed Area [MLA].



Source: J'son & Partners, operators' data

**Growth:** net additions of cellular subscribers in December amounted to 3.7 mln [+2.0%].

In December 2008 monthly growth raised on 12% in comparison with December 2007 [+404 тыс.].



Source: J'son & Partners, operators' data

In December 2008 a leader in yearly subscriber base growth in Russia is MegaFon [+7.8 million], while MTS was a leader till September 2008.

MTS has been keeping the leadership in the subscriber base growth in the Moscow Licensed Area since May 2007 [+1.97 million].

MTS has 28% share in yearly subscriber base growth in MLA and 13% for the same parameter for Russian market.

## The leading federal and regional operators

The highest subscriber base rate of growth for last 3 month has VimpelCom [+5,7%]. Further follow MegaFon [+4,7%] and Tele2 with Sibirtelecom [+4,6% each], the lowest subscriber base rate of grow has SMARTS – +0,03% just.

Operators	Total amount of subscribers for 31.12.2008	Growth over 3 Months, %	Subscribers in MLA, 31.12.2008
MTS	64 535 400	4,3%	15 422 743
VimpelCom <sup>1</sup>	47 676 844	5,7%	9 628 439
MegaFon	43 289 127	4,7%	6 479 666
Tele2 <sup>2</sup>	10 391 744	4,6%	
Uralsvyazinform	5 655 780	2,4%	
SMARTS <sup>3</sup>	3 501 870	0,03%	
NCC <sup>2, 4</sup>	2 620 000	4,5%	
Sibirtelecom	5 107 700	8,9%	
<i>Yeniseytelecom<sup>5</sup></i>	2 322 012	4,3%	
<i>Baikalwestkom<sup>5</sup></i>	1 934 961	3,6%	
Motiv [Yekaterinburg-2000]	1 491 720	0,6%	
New Telephone Company [NTC]	1 231 357	4,0%	

*Source: J'son & Partners, operators' data*

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<sup>1</sup> Since 2008 year company has changed registration politic for their subscribers

<sup>2</sup> J&P estimations

<sup>3</sup> Since July 2008 the operator has not consolidated subscribers of "Ulyanovsk-GSM"

<sup>4</sup> At the beginning of 2008 year company consolidate all subsidiary companies of "Volgatelecom": Nizhniy Novgorod Oblast, Penza Oblast, Saratov Oblast, Republic of Tatarstan, Mordovia and Chuvash Republic

<sup>5</sup> Subsidiary of Sibirtelecom