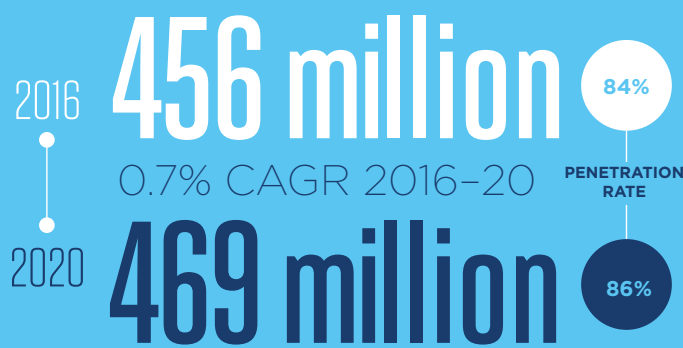
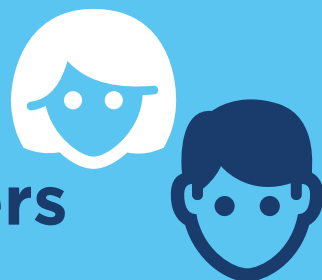


MOBILE ECONOMY EUROPE

Unique mobile subscribers



SIM connections



*Excluding M2M

Data growth driving revenues and operator investments

Operator total revenues

2016
2020

€143 billion



€146 billion



Operator capex of more than **€89 billion** for the period 2017-20



Mobile industry contribution to GDP

2016
2020

€541bn

3.4% GDP

€674bn

3.9% GDP

ACCELERATING MOVES TO MOBILE BROADBAND NETWORKS AND SMARTPHONE ADOPTION

4G

4G connections to increase from 34% of total in 2016 to

61%

by 2020



By 2020, smartphones will account for

76%

of all connections, up from 65% in 2016

5G

By 2025, there will be

214m

5G connections, 31% of total connections

Excluding M2M

Public funding

Mobile ecosystem contribution to public funding (before regulatory and spectrum fees)



€100bn
2016

Employment



Jobs directly supported by the mobile ecosystem

1.1 million
2016

Plus an additional 1.5 million indirect jobs supported