



**NTT DOCOMO, INC.**

**DOCOMO's Actions in India**

**September 29, 2010**

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## **DOCOMO's Actions in India**

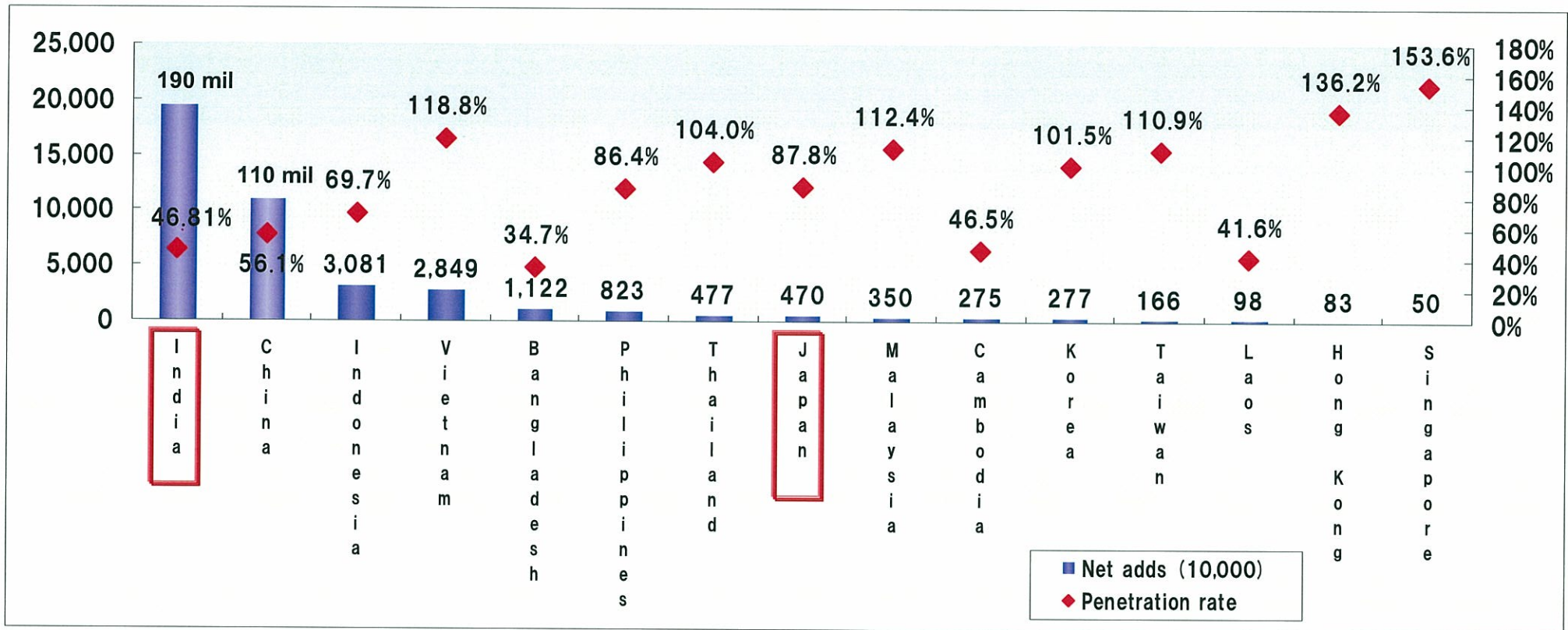
1. DOCOMO's Actions in India
2. Multimedia Broadcasting
3. Trial Demonstration in India

# 1-1. Growth Comparison of Principal Asian Markets

- India is the most attractive market in Asia in terms of number of net additional subscribers and penetration rate

## No. of net additional mobile subscribers and penetration rate of principal Asian markets

(10,000 subs)



Calculation based on subscriber data as of March 31, 2010.  
(Source) Wireless Intelligence

## 1-2. DOCOMO's Entry into Indian Market

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**Focused on India market that offers significant growth potential and market size among the emerging markets in view of the maturity of Japanese market**



**Tata Group, one of the largest conglomerates in India, was considered to be the best partner for its high credibility**



**DOCOMO to participate in TTSL's business operations to contribute to its further expansion**

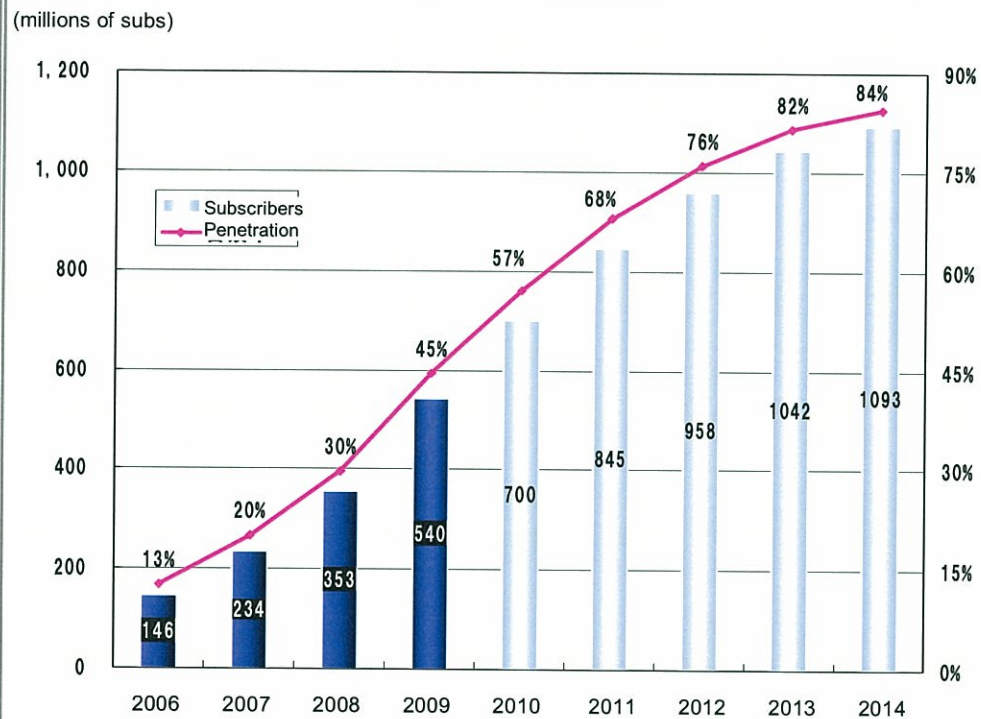


**Achieve DOCOMO's growth over the medium term through business synergies with TTSL**

## 1-3. Investments in TTSL (Tata Teleservices Ltd.)

- DOCOMO invested in Indian mobile operator, TTSL/TTML, in March 2009

### Growth of India's Mobile Phone Market



\*Data for 2010 and subsequent years are estimates.

Source: Wireless Intelligence

### India's Mobile Operator Ranking (Subscribers)

\*As of July 31, 2010

	Operator	Subscribers	Market Share
1	Bharti Airtel	139,220,000	21.3%
2	Reliance	113,310,000	17.4%
3	Vodafone Essar	111,460,000	17.1%
4	TTSL/TTML	74,850,000	11.5%
5	BSNL	73,780,000	11.3%
6	Idea	70,740,000	10.8%
7	Aircel	43,290,000	6.6%
8	Uninor	6,870,000	1.1%
9	SISTEMA	5,580,000	0.9%
10	MTNL	5,250,000	0.8%
11	Other	8,020,000	1.2%
	Total	652,420,000	100%

Source: TRAI

Note) TTSL/TTML was No. 6 when DOCOMO made investment (March 2009)

## 1-4. Business Cooperation with TTSL

- DOCOMO commenced full-scale business support with the establishment of “Business Technology Cooperation Committee” (BTCC) comprising senior members of two companies
- BTCC delivered tangible results in various areas, e.g., brand development, network roll-out, value-added service (VAS) development and joint procurement

Launched “TATA DOCOMO” brand for GSM service in June 2009



TATA DOCOMO outlet (Dive-in store)



TATA DOCOMO outlet (General store)



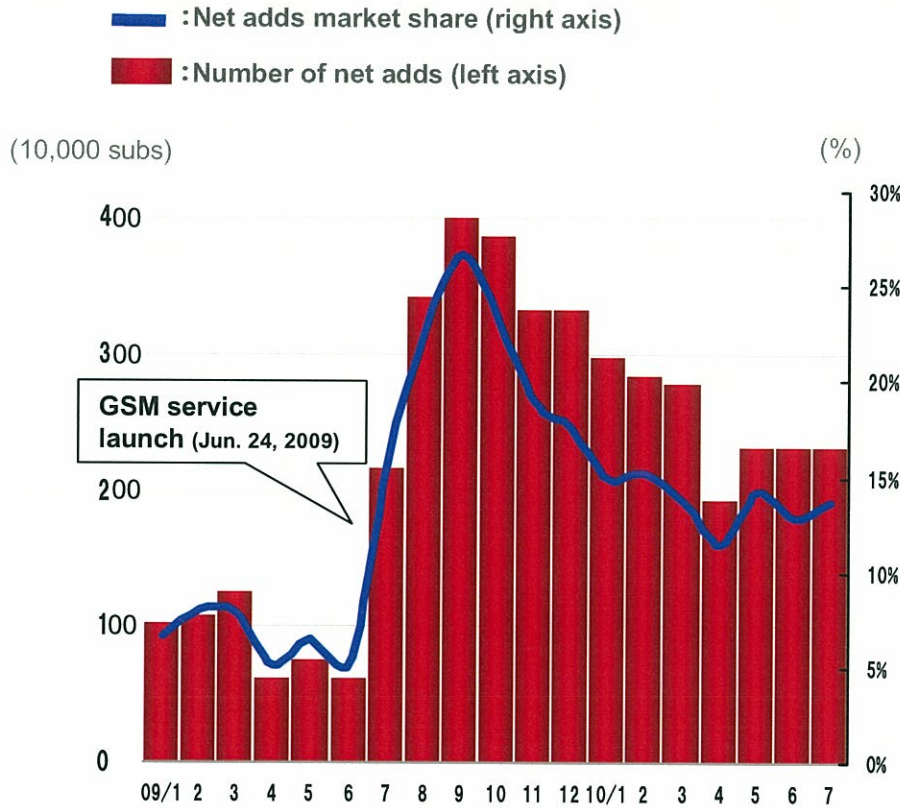
Advertisement (Newspaper ad, Airport signboard)



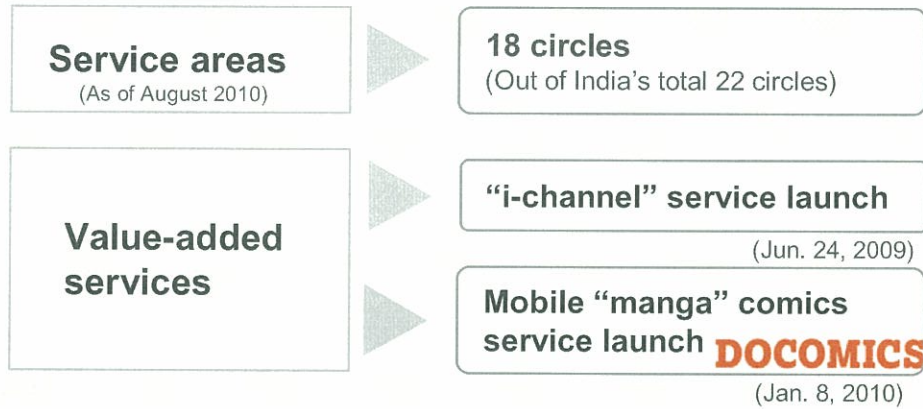
# 1-5. TTSL's Performance After Investment by DOCOMO

- Acquired No. 1 market share of net adds for 6 straight months from Aug. 2009 to Jan. 2010
- Launched DOCOMO's original value-added services, e.g., i-channel, "manga" comics delivery services
- Rose to India's No. 4 operator by subscriber market share in July 2010 (compared to No.6 when DOCOMO made investment in March 2009)

## ■ Number/market share of net additions\*

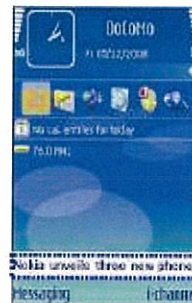


## ■ GSM roll-out status (Brand: TATA DOCOMO)



### ■ "i-channel" service

(Screen image)



### ■ "DOCOMICS" service



("Mizu-Wakusei Nendaiki")

\* Number and market share of net additions are the total for GSM and CDMA services of TTSL/TTML (Source: TRAI)

## 1-6. Future Plans for Indian Market

Leveraging DOCOMO's technology, experience and resources to the fullest extent, we will devote ourselves to contributing to the expansion of India's mobile phone market by providing high-quality mobile services to customers in India working together with the Tata Group

	Challenges in Indian Market		DOCOMO's planned actions
1	<u>3G network roll-out</u>	▶	Expeditious network deployment drawing on network construction expertise gained from experience in other overseas investments, etc.
2	<u>ARPU* Growth</u>	▶	Secure competitive advantage in 3G service market through introduction of innovative services developed in Japan after customizing them for India
3	<u>Differentiation from competition</u>	▶	Implement measures for customer satisfaction improvement in the areas of brand, marketing and customer retention
4	<u>Response to industry consolidation</u>	▶	Study our strategies for possible future industry consolidation, analyzing the changes in M&A guidelines

\*ARPU: Average Revenue Per User



## 2-1. Overview of Multimedia Broadcasting Business

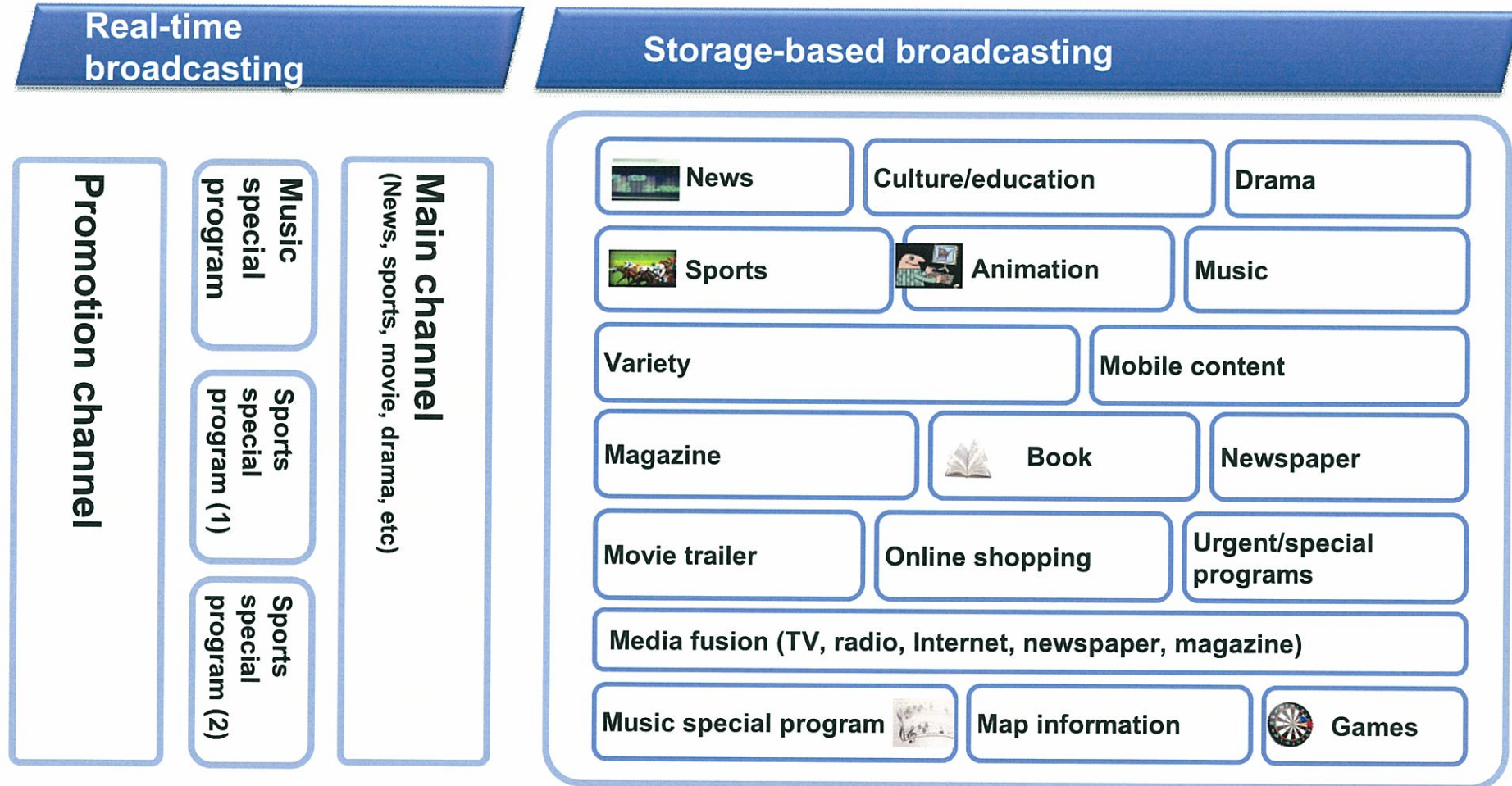


<p><b>Overview</b></p>	<ul style="list-style-type: none"> <li>• <b>New broadcasting service using spectrum bands to become available following the termination of analog TV service in July 2011 (VHF bands: 207.5MHz – 222MHz)</b></li> <li>• <b>Simultaneous delivery of large-capacity content to various mobile devices using broadcasting frequency</b></li> </ul>	
<p><b>Service launch</b></p>	<ul style="list-style-type: none"> <li>• <b>Scheduled for launch on Apr. 1, 2012</b> * Nearly same timing as opening of Tokyo Sky Tree Tower (Height: 634m)</li> </ul>	
<p><b>System</b></p>	<ul style="list-style-type: none"> <li>• <b>ISDB-Tmm system</b> <ul style="list-style-type: none"> <li>- <b>An extended system of ISDB-T for mobile use</b></li> <li>- <b>The ISDB-T system is an international standard, which was decided to be adopted in 10 countries around the world including countries in South America</b></li> </ul> </li> </ul>	
<p><b>Broadcast content</b></p>	<p><b>Real-time broadcasting (streaming)</b></p>	<p><b>Enables viewing of high-quality video in real time</b></p>
	<p><b>Storage-based broadcasting (file-casting)</b></p>	<p><b>Enables use of video, electronic books, and other files after downloading them on devices</b></p>
<p><b>Receiver devices</b></p>	<ul style="list-style-type: none"> <li>• <b>Mobile phones, smartphones, tablet information devices, electronic book readers, car navigation systems, etc.</b></li> </ul>	



## 2-2. Services of Multimedia Broadcasting (Conceptual)

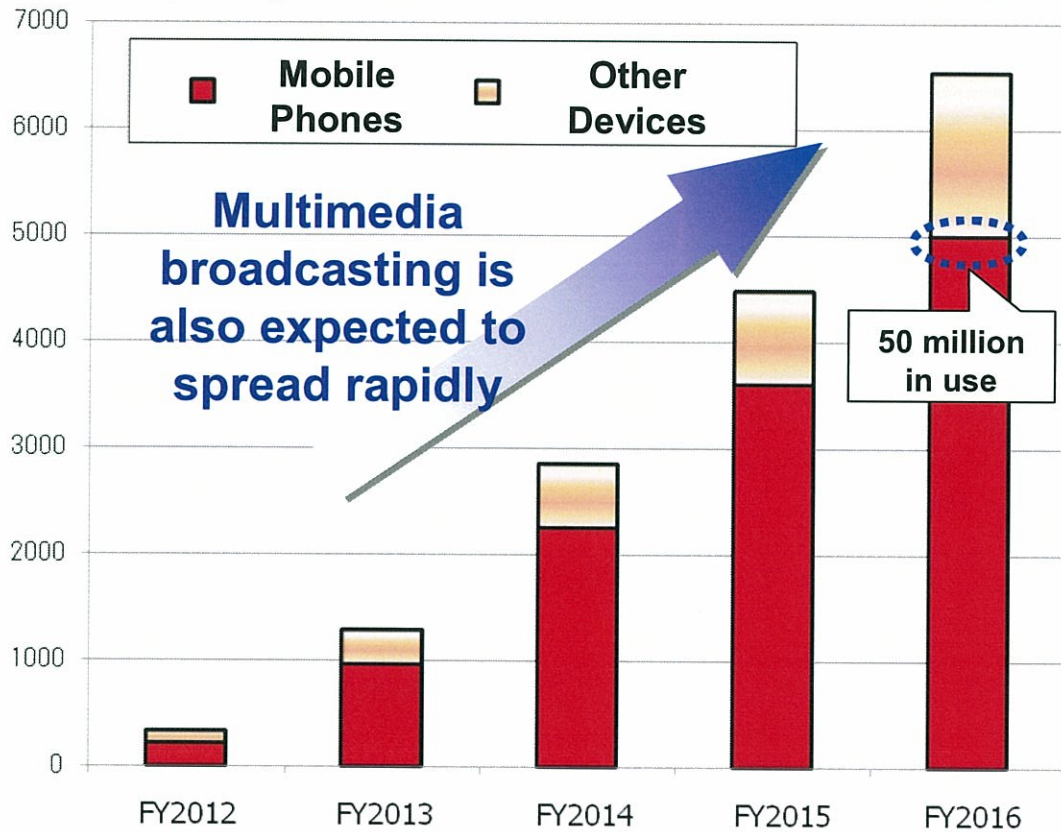
- Simultaneously offer real-time and storage-based broadcasting services to deliver a wide array of content



## 2-3. Expeditious Penetration of Multimedia Broadcasting-Enabled Devices

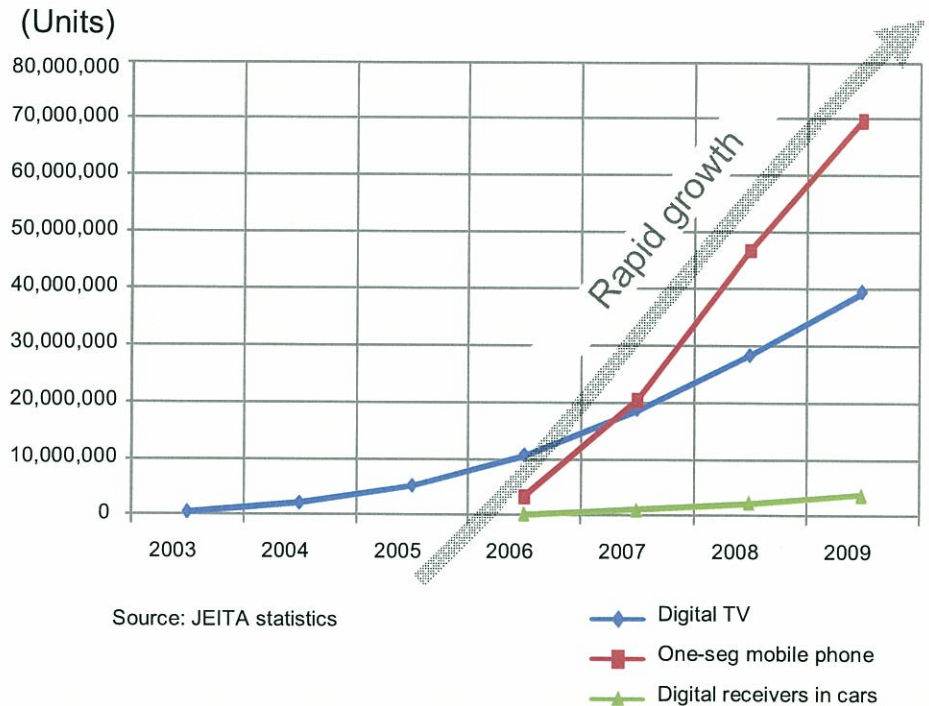
**Aim to expand the uptake of compatible devices expeditiously by equipping mobile phones with receiver capability (Target: 50 million units within 5 years after service launch)**

(10,000s) Projected penetration of multimedia broadcast-enabled devices



### [Reference]

Shipments of terrestrial digital and one-seg receivers



Source: JEITA statistics

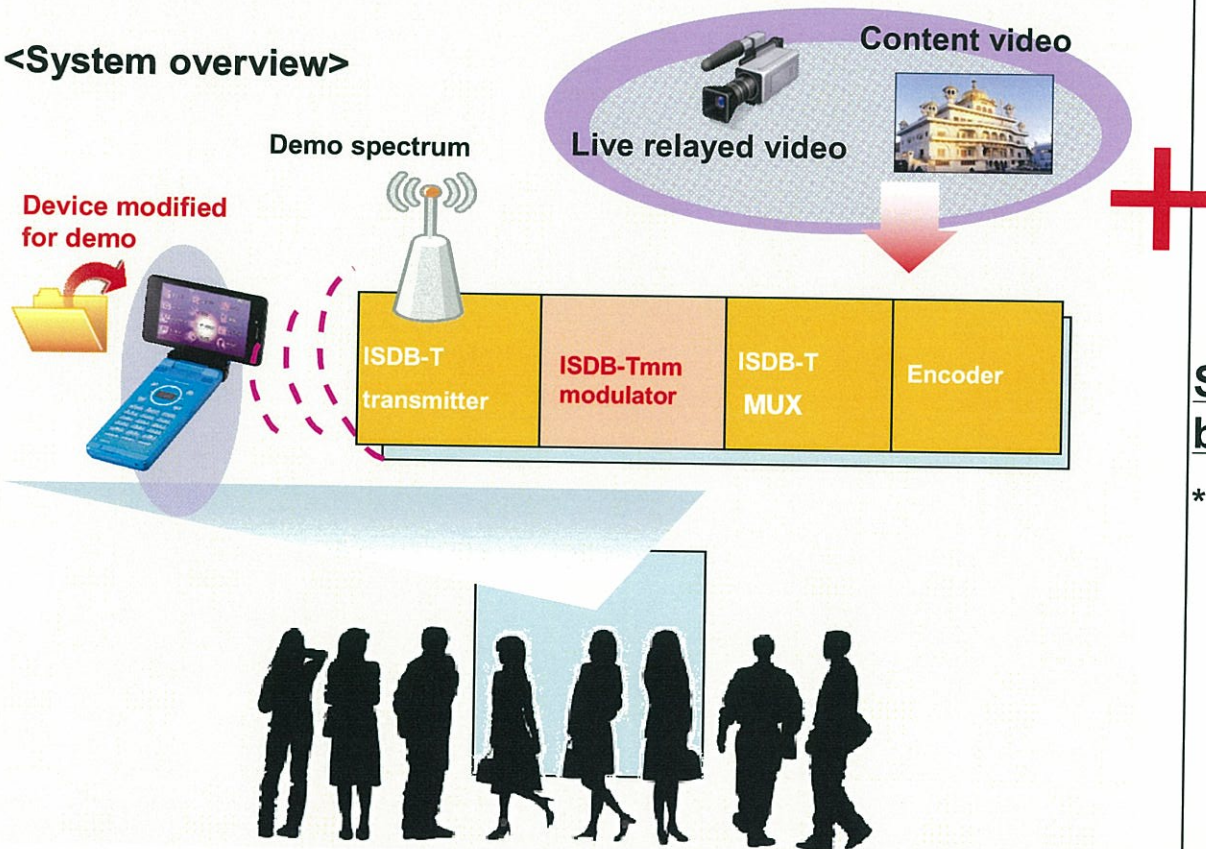
# 3-1. Outdoor ISDB-Tmm Demonstration/Seminar in India

- NTT DOCOMO adopted ISDB-Tmm system, a mobile multimedia broadcasting technology originated in Japan
- Plan to conduct outdoor demonstration and seminar to broaden the recognition and encourage the adoption of ISDB-Tmm system in India

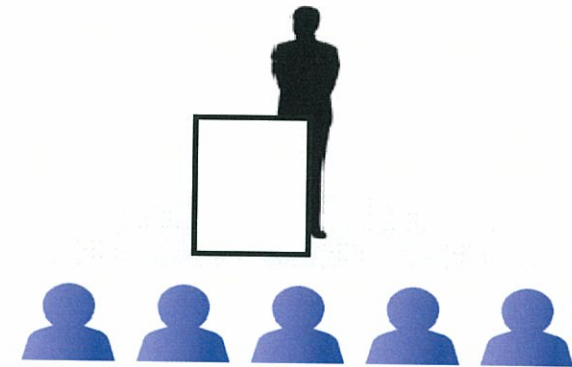
## <Outdoor demonstration>

Allows participants to experience high-quality streaming and file-casting based on ISDB-Tmm

### <System overview>



## <Seminar>



### Seminar on mobile multimedia broadcasting

- \* Speakers (planned)
  - Indian carriers
  - Japanese manufacturers
  - NTT DOCOMO, mmbi

## 3-2. Issues/Schedule For Conducting Outdoor Demonstration

**Trial spectrum will be required for conducting outdoor demonstrations.  
Cooperation of Indian Government on this matter will be highly appreciated.**

### <Planned Schedule>

- September 2010
  - Started scheduling of I&B (Ministry of Information & Broadcasting) for visit by DOCOMO in October 2010. Coordination currently in progress
  - Started modification of DOCOMO's device equipment to adjust to India's frequency
  - Plan to hold meetings with multiple mobile carriers in India (Sept. 27-30, 2010)
- October 2010
  - Plan to visit I&B (Ministry of Information & Broadcasting) and DoorDarshan (State-owned broadcaster) for presentation
  - Plan to submit application for trial spectrum to I&B
- December 2010
  - Plan to hold outdoor demonstration and seminar on ISDB-Tmm system (3 days)

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