

**WI SNAPSHOT (Issue #9)****Italian operators lead the way in HSPA in Western Europe**

Mobile operators in Western Europe have stepped up rollout of HSPA technology this year. In Germany, for example, both T-Mobile and O2 have recently announced plans to complete their respective nationwide HSPA network upgrades. T-Mobile Germany [announced this month](#) that all German cities with more than 50,000 inhabitants are now able to take advantage of HSPA download (HSDPA) speeds of up to 3.6 Mb/s, while 250 cities will be offered speeds of up to 7.2 Mb/s. HSPA uplink (HSUPA) speeds are planned to be increased to 2 Mb/s by the end of the year, from around 1.4 Mb/s currently. Similarly, rival O2 Germany [recently appointed Nokia Siemens Networks](#) to cover the whole of Germany with HSPA download technology (HSDPA).

Both these operators make our list of the top 20 HSPA mobile operators in Western Europe. However, it is the Italian rather than German operators that are leading the market. 3 Italy, TIM and Vodafone Italy occupy the top three spots and control roughly a third of the Italian HSPA market each. Wind, the fourth Italian operator, has less than a 4% share of the country's HSPA market but still makes it to number 19 in the list with 63,600 connections by end of first-quarter 2008.

In total, Italian operators had 1.6 million HSPA connections by the end of the quarter. This was almost 1 million more than Germany, the second-largest market (683,700). The German market was dominated by Vodafone Germany, which had a 58% share of German HSPA connections and is the highest-placed non-Italian operator on our list in fourth-place with just under 400,000 first-quarter connections.

As well as Germany, Vodafone is the leading HSPA operator in several other Western European markets; Vodafone Spain (5th), Vodafone UK (6th), Vodafone Ireland (14th) and Vodafone Portugal (15th) all make the list as the leading operators in their respective markets.

The majority of the operators in the list are drawn from the 'Big Five' Western European markets: France, Germany, Italy, Spain and the UK. France is lagging behind with just 319,091 HSPA connections in the quarter and just two operators - SFR (7th) and Orange France (10th) - making the top 20.

However, several operators outside the Big Five markets are also reporting significant numbers. As well as the aforementioned Vodafone operators in Ireland and Portugal, there is also Cosmote of Greece (17th) and Swisscom of Switzerland (18th). Swisscom, Switzerland's largest mobile operator, has close to a 90% share of the local HSPA market (by connections) and is growing its HSPA connections base by more than 60% a quarter.

**Will Croft, Analyst, Wireless Intelligence:** *"As the fourth-largest global region by HSPA connections and with a HSPA penetration rate of only 1.15% by first-quarter 2008, Western Europe has plenty of room for growth. The move towards flat-rate tariffs underway in most European markets is helping to bed-in HSPA services and ramp-up data service usage. 3 Italy, for example, earned 30% of all service revenue (which contributed to ARPU of €29.30 per month) from non-voice services in 2007, a statistic helped by its 86% HSDPA network coverage. Similarly, rival TIM claims to cover 70% by population.*

*Western European operators are now looking to move beyond HSPA downlink speeds of 3.6Mb/s toward the theoretical peaks of the current standard of around 7.2Mb/s, which will only improve the mobile broadband experience for end users. Meanwhile, as users begin to demand faster end-application experiences, uplink speeds will become all the more important for services that push data from the handset, particularly e-mail and, increasingly, peer-to-peer usage."*

Rank	Operator	Country	Connections	National market share(connections)	Quarterly growth rate (connections)
1	3 Italy	Italy	548,183	34.11%	36.45%
2	TIM Italy	Italy	542,543	33.76%	33.45%
3	Vodafone Italy	Italy	452,960	28.18%	41.52%

<b>4</b>	Vodafone Germany	Germany	399,179	58.39%	35.27%
<b>5</b>	Vodafone Spain	Spain	256,624	53.85%	47.56%
<b>6</b>	Vodafone UK	UK	239,127	40.28%	49.00%
<b>7</b>	SFR	France	184,920	58.51%	34.62%
<b>8</b>	T-Mobile Deutschland	Germany	166,999	24.41%	40.66%
<b>9</b>	Telefonica Moviles	Spain	157,254	33.00%	60.21%
<b>10</b>	Orange France	France	120,899	38.25%	48.65%
<b>11</b>	3 UK	UK	108,754	18.32%	30.60%
<b>12</b>	O2 UK	UK	93,205	15.70%	69.02%
<b>13</b>	T-Mobile UK	UK	87,332	15.04%	66.36%
<b>14</b>	Vodafone Ireland	Ireland	80,598	83.00%	44.65%
<b>15</b>	Vodafone Portugal	Portugal	76,572	40.83%	38.72%
<b>16</b>	O2 Germany	Germany	74,804	10.94%	46.29%
<b>17</b>	Cosmote	Greece	70,524	46.92%	44.24%
<b>18</b>	Swisscom	Switzerland	65,789	88.91%	60.24%
<b>19</b>	Wind	Italy	63,600	3.96%	63.08%
<b>20</b>	Orange UK	UK	63,235	10.65%	75.77%

#### **Western Europe HSPA connections: Top 20 operators**

*Source: Wireless Intelligence; all data Q1:2008*

#### **About Snapshot**

Snapshot is a new media service from the Wireless Intelligence team dedicated to delivering timely market intelligence and analysis for the global mobile industry. Published every week, Snapshot is designed to offer an instant insight into the latest developments affecting the fast-moving mobile market.

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#### **About Wireless Intelligence**

Wireless Intelligence is a database on the global mobile market. It covers all mobile technologies and includes 1,250,000 individual data points spanning 670 mobile network operators and 1300 networks in over 200 countries. It is the de facto industry tool for market intelligence with a subscriber base of over 500 of the world's mobile operators and leading equipment manufacturers.

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