

**Arthur D. Little**  
**Firm Presentation**

June, 2006

**Arthur D Little**

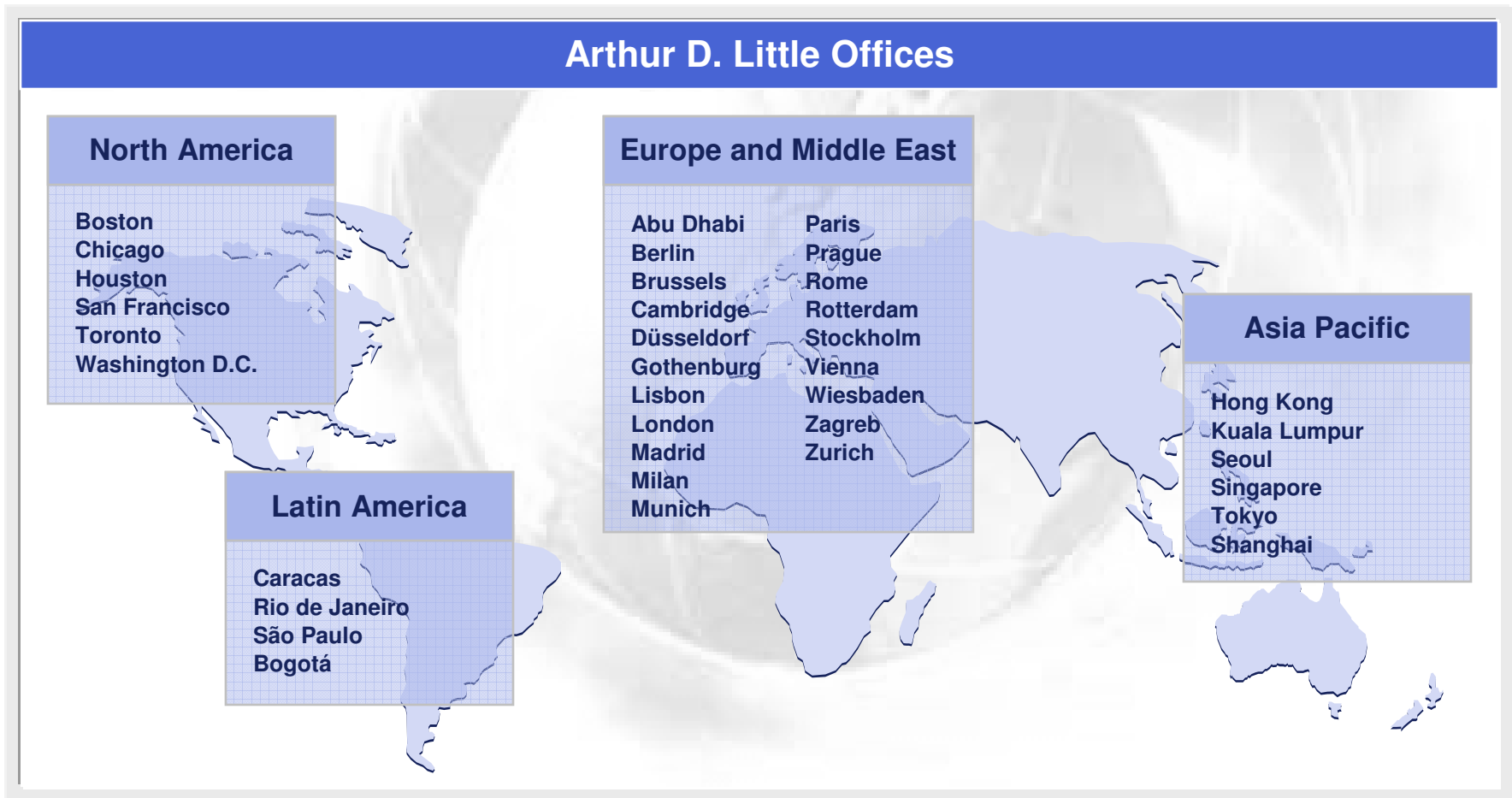
Edifício Picoas Plaza  
Rua do Viriato, nº 13E, Nc 6 – 3º D  
1050-233 Lisboa - Portugal  
Tel: + 351 210 091 500  
Fax: + 351 210 091 599

[www.adlittle.com](http://www.adlittle.com)

**Arthur Dehon Little, Professor at the MIT, founded the “Research Palace” in Cambridge, Massachusetts in 1886**



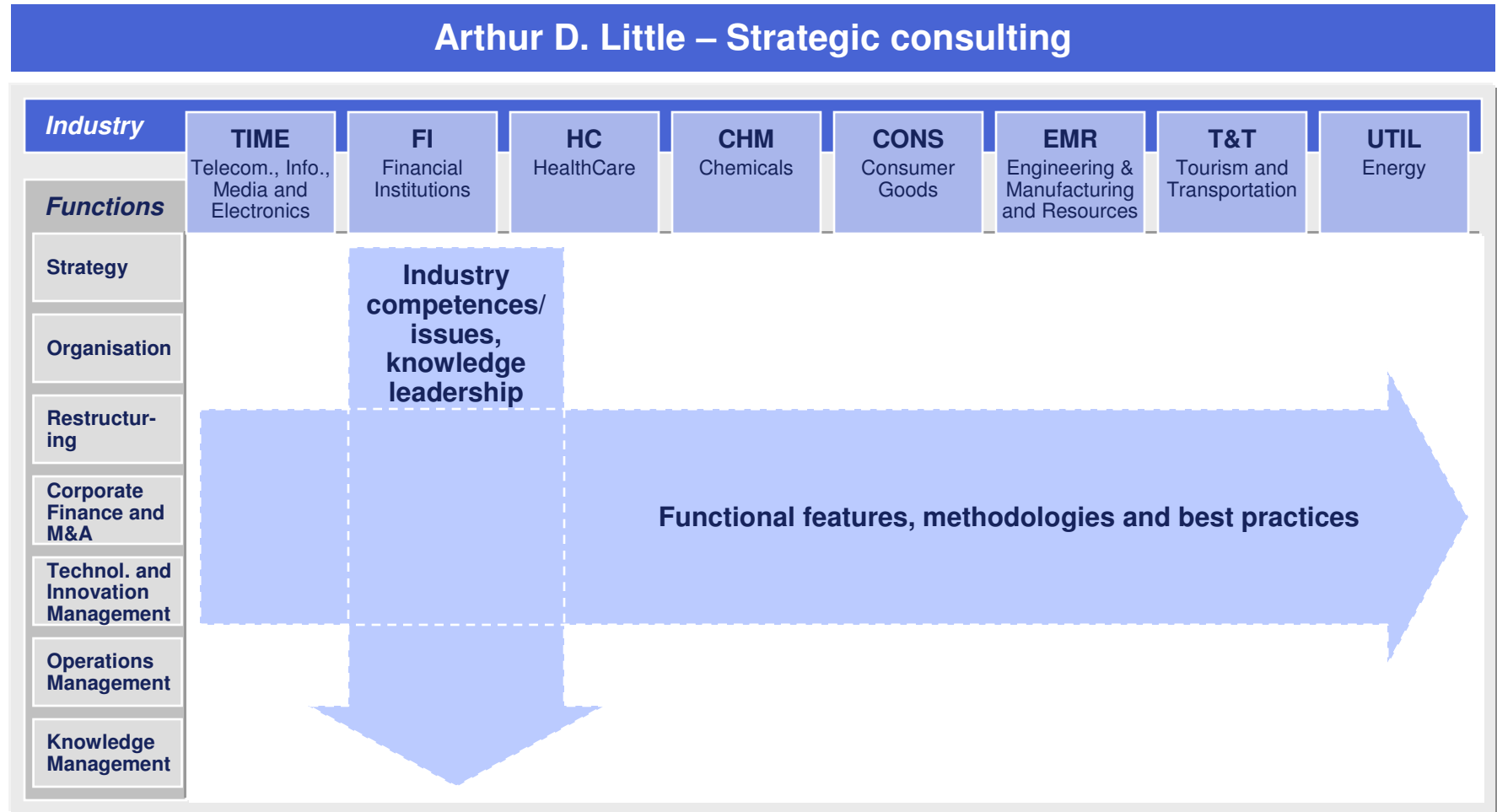
With more than 1000 professionals Arthur D. Little has built a world-wide network of expertise with strong local presence in all major markets



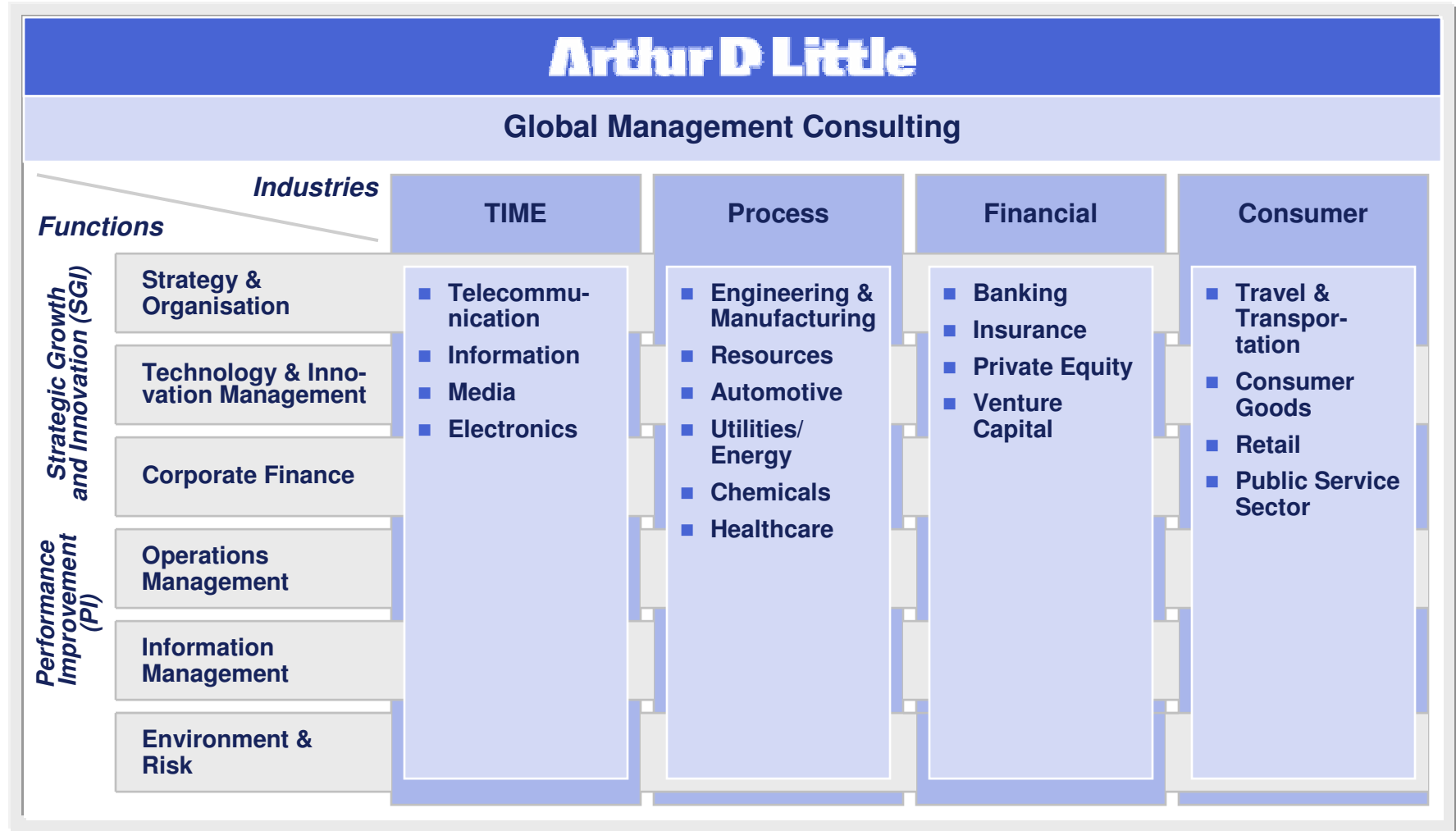
## We support clients in all the industries



Our matrix structure let us strengthen synergies between different industries



## Arthur D. Little focuses on Management Consulting



## Arthur D. Little offers insights into future markets and trends through a number of global studies

	<p><b>Mobile Operators, 2001, 2002, 2003, 2004, 2005</b>  <i>Annual report to monitor and forecast the development of mobile multimedia services, competitive landscape, key indicators such as ARPU and industry profitability, evolution of MM terminals and key issues that affect the development</i></p> <p><b>The Arthur D. Little Global Broadband Report 2003, 2004</b>  <i>A comprehensive global study (22 countries, 57% of the global GDP and over 90% of the global Broadband market) based on market research, analysis and modeling, complemented by 84 interviews with leading companies of the Broadband industry. The Report offers perspectives on the evolution towards profitable Broadband and potential courses of action for all industry players.</i></p>
	<p><b>Corporate Venturing Study, 2002</b>  <i>Global study focussing on which goals established enterprises pursue in CV, which approach they use and what kinds of experience they have collected in this field</i></p> <p><b>Partnering Study – Challenges for the Old and the New Economy, 2001</b>  <i>Global study in more than 20 countries world-wide focussing on the partnering strategies of old and new economy companies today and in the future</i></p> <p><b>Market Space Innovation Study, 2003</b>  <i>Global study focusing of winning strategies for profitable growth</i></p> <p><b>Benchmarking of Global and Regional Headquarters</b>  <i>Insights into Headquarters Design and Location Selection</i></p>

## Participation and organization of selected events allows Arthur D. Little to keep track of innovation and future client needs



The collage includes the 'world sports forum' logo, a '4th World Sports Forum' proceedings cover, the 'ISC-Symposium' logo, the 'IMD' logo, a 'World Economic Forum' logo, and various smaller images related to these events.

### World Sports Forum

*Offers athletes, federations, media and sporting goods companies a platform to discuss (once a year) issues around the world of sports - exclusively sponsored by Arthur D. Little*

### ISC-Symposium

*The ISC presents a forum where students interact with professionals and experts, and are able to make an original contribution to the assessment of world affairs - sponsored by Arthur D. Little*

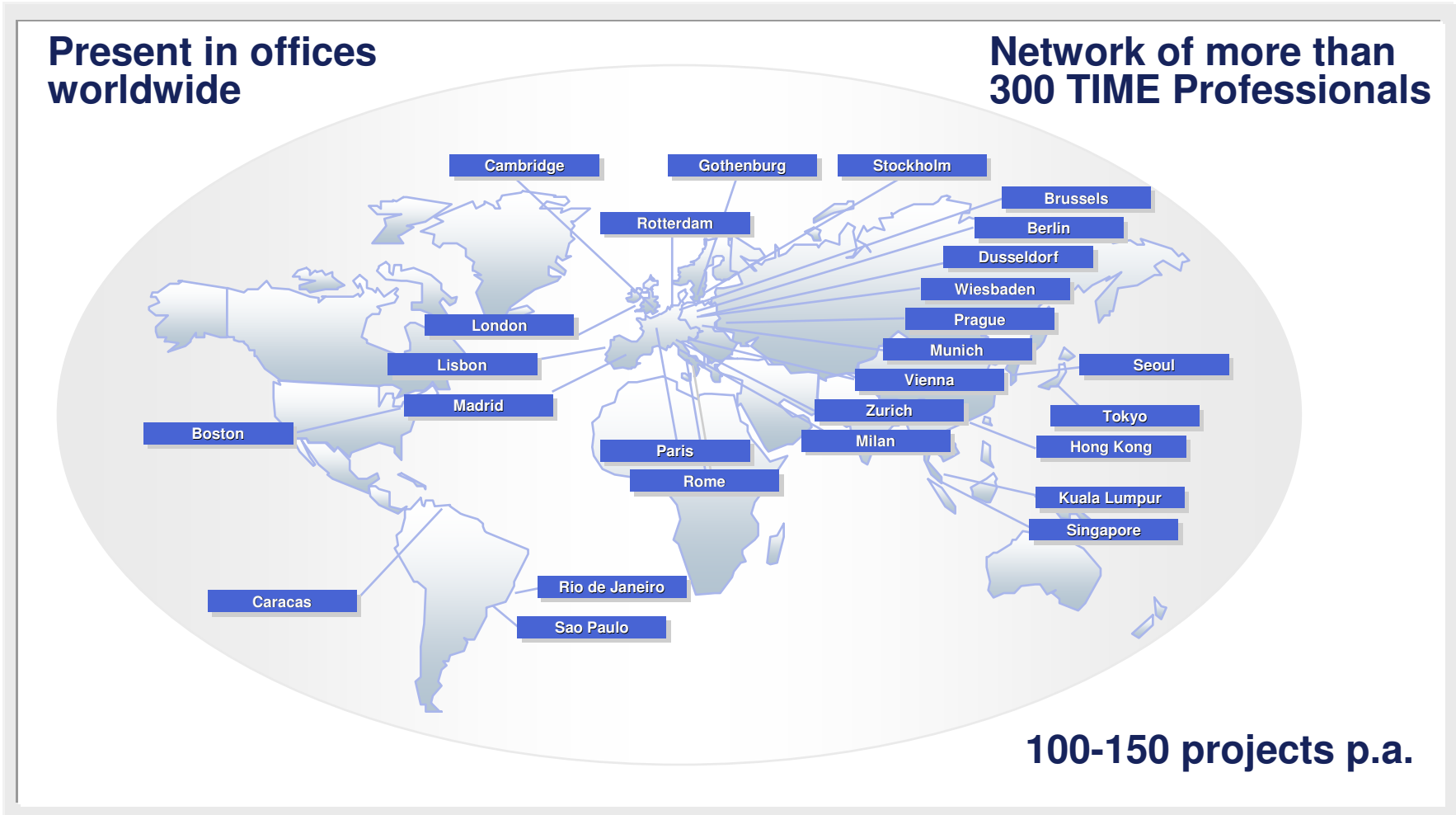
### World Economic Forum

*The World Economic Forum is an international organization committed to improving the state of the world. The Forum provides a collaborative framework for the world's leaders to address global issues, engaging particularly its corporate members in global citizenship - Arthur D. Little is a partner of the World Economic Forum*

### IMD-Network

*We are Business Associates of the International Institute for Management Development's Learning Network*

# Arthur D. Little is a recognized leading consulting company in the TIME (Telecoms, Information Technology, Media and Electronics) Sector



## Arthur D. Little has a worldwide experience that covers all telecom sectors

Mobile	Fixed		Content, broadcasting and multimedia	
<p>Amena Ameritech Mobile Bell South Bouygues Telecom BT Cellnet/mmO<sub>2</sub> Centel Contel E-Plus GTE Hutchison KPN Mobile Maroc Telecom Microtel Mobile Telecommunications Motorola (Iridium) Mtle (Paging) Northern Telecom Nynex Omnitel Pronto Italia Orange Orascom Egypt Pactel Mobile Pagenet Pan America South Western Bell SFR Sunrise Swisscom Mobile Telefonica Telecom Italia Mobile Telephone &amp; Data T-Mobile TMN Vivendi Telecom International Vodafone</p>	<p><b>Western Europe</b> 9 Telecom Austrian PTT BT Belgacom Cable &amp; Wireless Deutsche Telekom France Telecom ONI Portugal Telecom PTT Telecom (Netherlands) STET Swiss PTT Telecom Italia Telefonica UPC</p> <p><b>North America</b> Alberta Telecom Inc Ameritech AT&amp;T Bell Atlantic Bell South Canadian Post Centel Cincinnati Bell Inc. Contel GTRE MCI* Nynex Pacific Telesis Puerto Rico Communications Authority Rochester Telephone Co. South Western Bell Sprint US West</p>	<p><b>Asia / Pacific</b> KDD NTT OTC Singapore Telecom Syarikat Telekom Malaysia Berhad</p> <p><b>South America</b> CANTV Venezuela</p> <p><b>Eastern and Central Europe</b> Bulgarian Telecommunications Company Hungarian Telecommunications Company (MATAV) SPT</p> <p><b>Regulators</b> ANACOM Belgian Ministry of Communic. Polish Ministry of Communications Commission of the European Communities Australian Department of Transport and Telecommunications Canadian Ministry of Telecommunications Numerous US State Regulators Ministry of Telecomm. Brunei BIPT-IBPT (Belgium) OFTA (Hong Kong)</p>	<p>BBC Bertelsmann Chargeurs El Tiempo Libération LVMH Matra Mercedes-Benz</p>	<p>Noos Omnitel Pathé RAI STET TDF Victoire Tél.</p>
			<p><b>Manufacturers</b> Ascal NV Ascom Holding AG AT&amp;T CNES (satellites communications) Ericsson GPT Hewlett Packard Hitachi Ltd. Lucent Matra SA Motorola Nokia Nortel OKI Electric Industry Co. Ltd. Philips Raychem Corp. Rockwell Siemens Sumitomo Electric Tellabs Teradynz Inc.</p>	

## Arthur D. Little follows working principles that ensure long-term success for clients

- 
- We treat our mandates in a holistic way, bridging between strategy and implementation
  - Our stakeholder approach considers the employees as a prerequisite for lasting improvements
  - We work closely together with our clients according to the Side-by-Side<sup>®</sup> approach
  - Our consultants have broad industry experiences
  - We are neutral and independent

**Contacts:**

**Grant Greatrex**  
*Senior Partner*

Tel.: + 351 210 091 509  
E-mail: [greatrex.grant@adlittle.com](mailto:greatrex.grant@adlittle.com)

**Rui Lavado**  
*Senior Manager*

Tel.: + 351 210 091 509  
E-mail: [lavado.rui@adlittle.com](mailto:lavado.rui@adlittle.com)

**Arthur D Little**

Edifício Picoas Plaza  
Rua do Viriato, nº 13E, Nc 6 – 3º D  
1050-233 Lisboa - Portugal  
Tel: + 351 210 091 500  
Fax: + 351 210 091 599  
[www.adlittle.com](http://www.adlittle.com)