

RECMA Billings report « Definitive 2006 » - June 2007

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42-RUSSIA

Buying billings 2006 by Agency

RANK 06	Market Shares 2006	Groups / Operational entities Media Agencies sub-brands	Buying Billings Definitive 2006	Buying billings			Buying Billings Definitive 2005 (Kommersant) \$m	Growth Rates 06 vs. 05	Staff figures 2006	Ratio billings / Staff
				Top 200 advertisers > \$3m	Billings out of top 300 < \$3m	nb clients out of Top 300				
1	4.8%	Starcom <i>Publicis Groupe Media</i>	309	271	38	16	217	+42%	60	5.1
2	3.5%	MediaVest <i>Publicis Groupe Media</i>	227	202	25	14	111	x2	66	3.4
3	3.2%	Initiative <i>Interpublic / Magna Global</i>	205	195	10	10	171	+19%	70	2.9
4	3.0%	Optimum Media OMD <i>Omnicom Media Gr / OPera</i>	196	175	21	16	113	+73%	57	3.4
5	2.9%	Vizeum <i>Aegis Media</i>	185	161	24	13	81	x2	45	4.1
6ex	2.8%	Mediaedge:cia <i>WPP / GroupM</i>	183	154	29	18	162	+13%	112	1.6
6ex	2.8%	Smart Communications <i>Independent**</i>	183	172	11	10	129	+42%	60	3.1
8	2.7%	ZenithOptimedia <i>Publicis Groupe Media</i>	175	155	20	8	21	x8	48	3.6
9	2.6%	Universal McCann <i>Interpublic / Magna Global</i>	170	145	25	18	162	+5%	62	2.7
10	2.5%	Maxus (ex-Mega Media) <i>WPP / GroupM</i>	169	166	3	5	107	+58%	50	3.4
11	2.5%	MindShare <i>WPP / GroupM</i>	165	148	17	6	139	+19%	75	2.2
12	2.5%	OMD Media Direction <i>Omnicom Media Gr / OPera</i>	164	103	61	21	144	+15%	75	2.2
13	2.5%	MediaCom <i>WPP / GroupM</i>	160	148	12	9	69	x2	70	2.3
14	2.1%	APR Media Services <i>Omnicom Media Gr / OPera</i>	135	127	8	6	96	+40%	48	2.8
15	1.8%	MPG <i>Havas Media</i>	118	114	4	4	94	+26%	55	3.1
16	1.5%	Carat <i>Aegis Media</i>	98	72	26	18	79	+24%	31	3.2
17	1.0%	Sorec Media <i>Independent**</i>	63	33	30	19	54	+17%	47	1.3
18	0.9%	Media First <i>Independent</i>	58	32	26	34	37	57%	24	2.4
19	0.9%	PHD (ex-MediaWise) <i>Omnicom Media Gr / OPera</i>	57	25	32	20	28	x2	39	1.5
20	0.8%	Rapp Collins Media <i>Omnicom Media Gr / OPera</i>	51	35	16	6	19	x2.5	35	1.5
21	0.8%	Medialect <i>Independent</i>	e35	15	20	17	37	=	32	1.1
22	0.3%	MC2 (ex-Bates Viag) <i>WPP / GroupM</i>	21	6	15	8	12	x2	17	1.2
23	0.3%	TBWA Mediaplan <i>Omnicom Media Gr / Opera</i>	18	2	16	16	10	x2	19	0.9
-	43%	Total Media Agency (A)	2 806	2 404	402	232	1 835	+50%	979	2.7
-	57%	Independent / In-house (B)	3 684	811	///	///	3 195	+16%	///	///
-	100%	Total RUSSIAN Market (A + B)	6 490	3 215	///	///	5 030	+29%	///	///

* The 2005 figures are based on Kommersant publication – due to the change of methodology in 2006 please be cautious while considering market growth figures.

** Independents part of Russian Buying Group : Smart Communication / Video International – Sorec Media / OPera

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42-RUSSIA

Buying billings 2006 *by Group of Networks*

RANK 06	Market Shares 2006	Groups / Operational entities Media Agencies sub-brands	Buying Billings Definitive 2006	Buying Billings			Buying Billings Definitive 2005 \$m (Kommersant)	Growth Rates 06 vs. 05	Staff figures 2006	Ratio billings / Staff
				Top 200 advertisers >\$3m	Billings out of top 300 <\$3m	nb clients out of Top 300				
1	10.9%	Publicis Groupe Media/ PGM	711	628	83	38	349	x2	174	4.0
1	8.3%	Starcom MediaVest Group	536	473	63	30	328	+48%	126	4.0
-	4.8%	of which Starcom	309	271	38	16	217	+42%	60	5.1
-	3.5%	of which MediaVest	227	202	25	14	111	x2	66	3.4
8	2.7%	ZenithOptimedia	175	155	20	8	21	x8	48	3.6
2	10.8%	WPP / GroupM	698	622	76	46	489	+43%	324	2.2
3	5.4%	Mediaedge:cia Group	352	320	32	23	269	+30%	162	2.2
-	2.8%	of which Mediaedge:cia	183	154	29	18	162	+12%	112	1.6
-	2.5%	of which Maxus	169	166	3	5	107	+58%	50	3.4
7	2.8%	MediaCom Group	181	154	27	17	81	x2	87	2.1
-	2.5%	of which MediaCom	160	148	12	9	69	x2	70	2.3
-	0.3%	of which MC2 (ex-Bates Viag)	21	6	15	8	12	x2	17	1.2
10	2.5%	MindShare	165	148	17	6	139	+19%	75	2.2
3	9.6%	Omnicom Media Group OMG	621	467	154	85	410	+51%	273	2.3
2	6.2%	Optimum Media OMD Group	400	339	61	44	238	+68%	159	2.8
-	3.0%	of which Optimum Media OMD	196	175	21	16	113	+73%	57	3.4
-	2.1%	of which APR Media Services	135	127	8	6	96	+39%	48	2.8
-	0.8%	of which Rapp Collins Media	51	35	16	6	19	x2.5	35	1.5
-	0.3%	of which TBWA Mediaplan	18	2	16	16	10	x2	19	0.9
4	3.4%	BBDO Russia	221	128	93	41	172	+28%	114	1.9
-	2.5%	of which OMD Media Direction	164	103	61	21	144	+14%	75	2.2
-	0.9%	of which PHD (ex-MediaWise)	57	25	32	20	28	x2	39	1.5
4	5.8%	Interpublic / Magna	375	340	35	28	333	+13%	132	2.8
5	3.2%	Initiative	205	195	10	10	171	+19%	70	2.9
9	2.5%	Universal McCann	170	145	25	18	162	+5%	62	2.7
5	4.4%	Aegis Media	283	233	50	21	160	+77%	76	3.7
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-	57%	Independent / In-house (B)	3 684	811	-	-	3 195	+16%	-	-
-	100%	Total RUSSIAN Market (A + B)	6 490	3 215	-	-	5 030	+29%	-	-

* The 2005 figures are based on Kommersant publication – due to the change of methodology in 2006 please be cautious while considering market growth figures.

The Buying billings are calculated from the analysis of the agency client lists and the budget amounts 2006 sourced from TNS Gallup Media (Top 200 advertisers) to which is added a certain number of declared clients not part of the Top 200.