

the future of mobile an operator perspective

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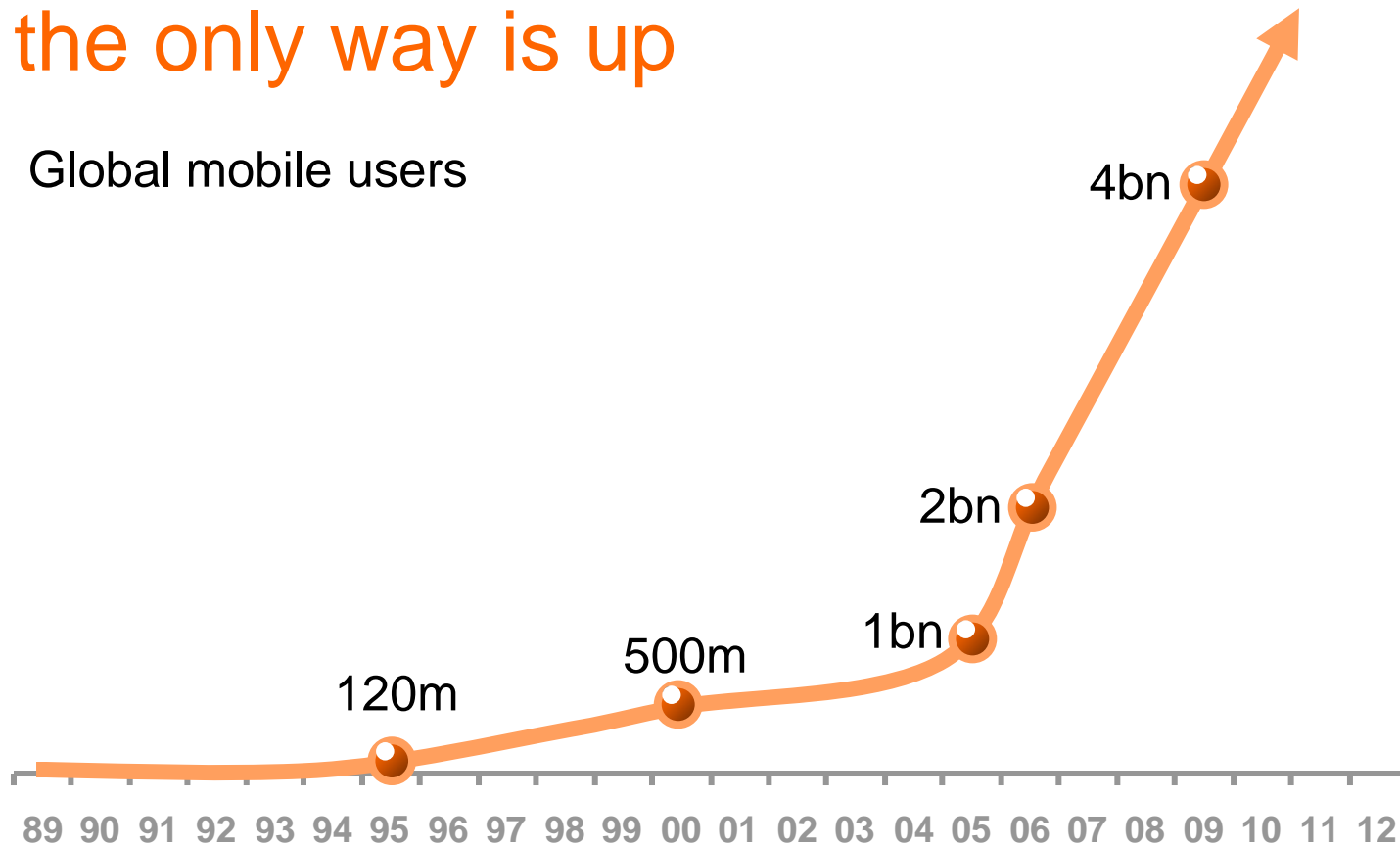
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the mobile future

the only way is up

Global mobile users



the next peak

- driven by innovation in mobile data
- rapid growth in mobile broadband
 - challenging fixed: in both developed and emerging economies
- next opportunity: mobile Internet
 - animating the long tail
 - the 85% of customers who are non-users

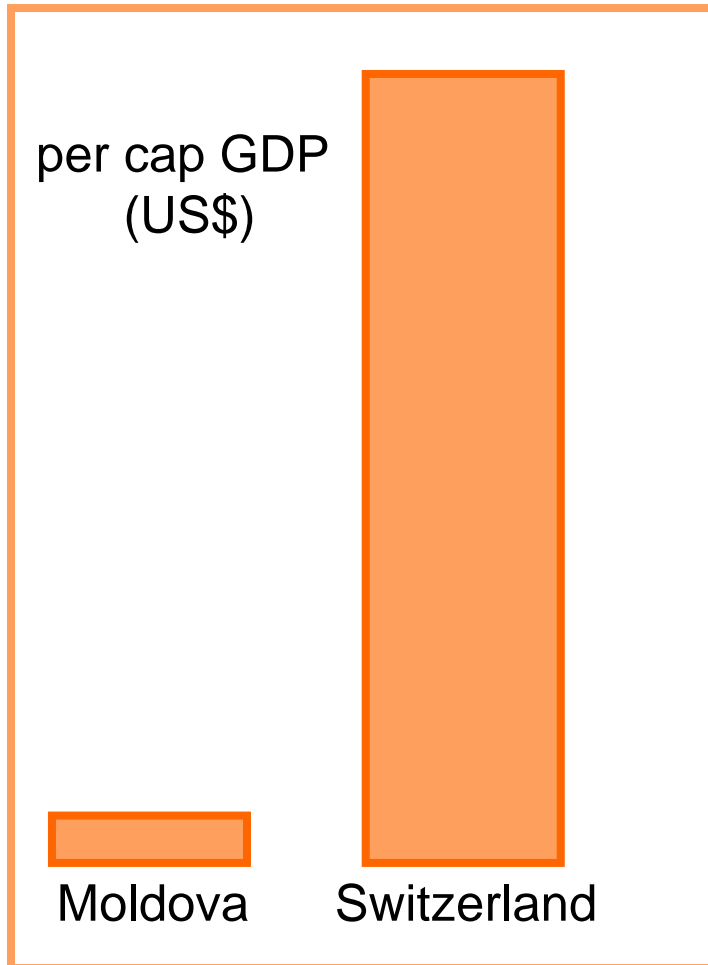


innovation for a personal internet

- get the basics right
- price
 - transparency and affordability
- network
 - the appropriate technology
- services
 - end to end propositions for specific user needs
- customer support
 - a new opportunity to add value



a global picture



very different countries
- same appetite for
innovation

“second wave”
innovation occurs
everywhere



unleashing the second wave

- key challenges
 - sustainability
 - handsets: 15% sold are returned
 - chargers: 185m sold in EU pa
 - networks: 60% of total energy consumption
- clear the path for customer investment
 - close working between industry and OFCOM





Thank you