

IDATE – DigiWorld Summit 06

Séminaire « 3G Evolution »

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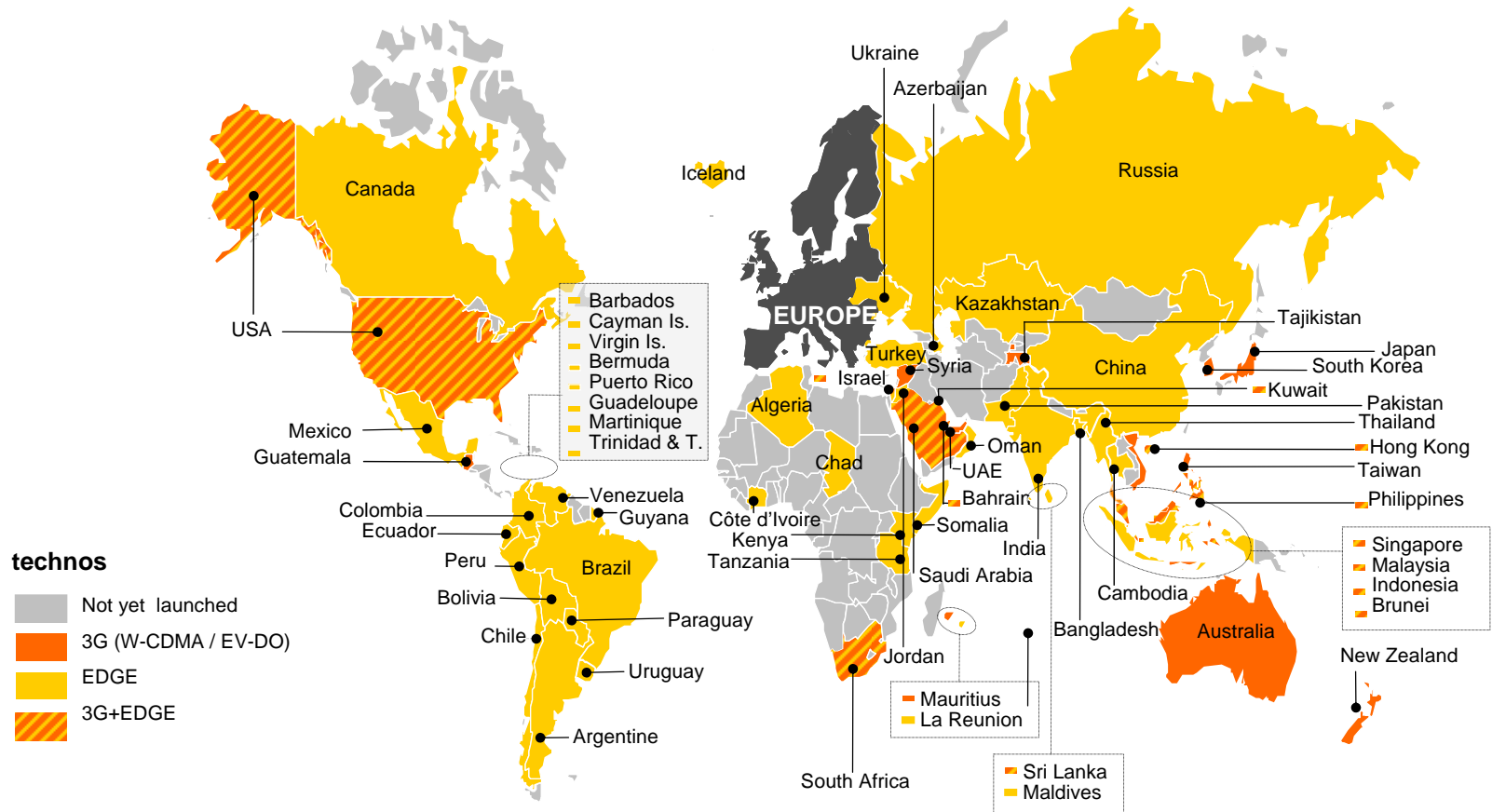
Summary

- The mobile broadband revolution
- Orange is the leader in mobile broadband in France
- Innovation for Orange through mobile TV services

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The mobile broadband throughout the world

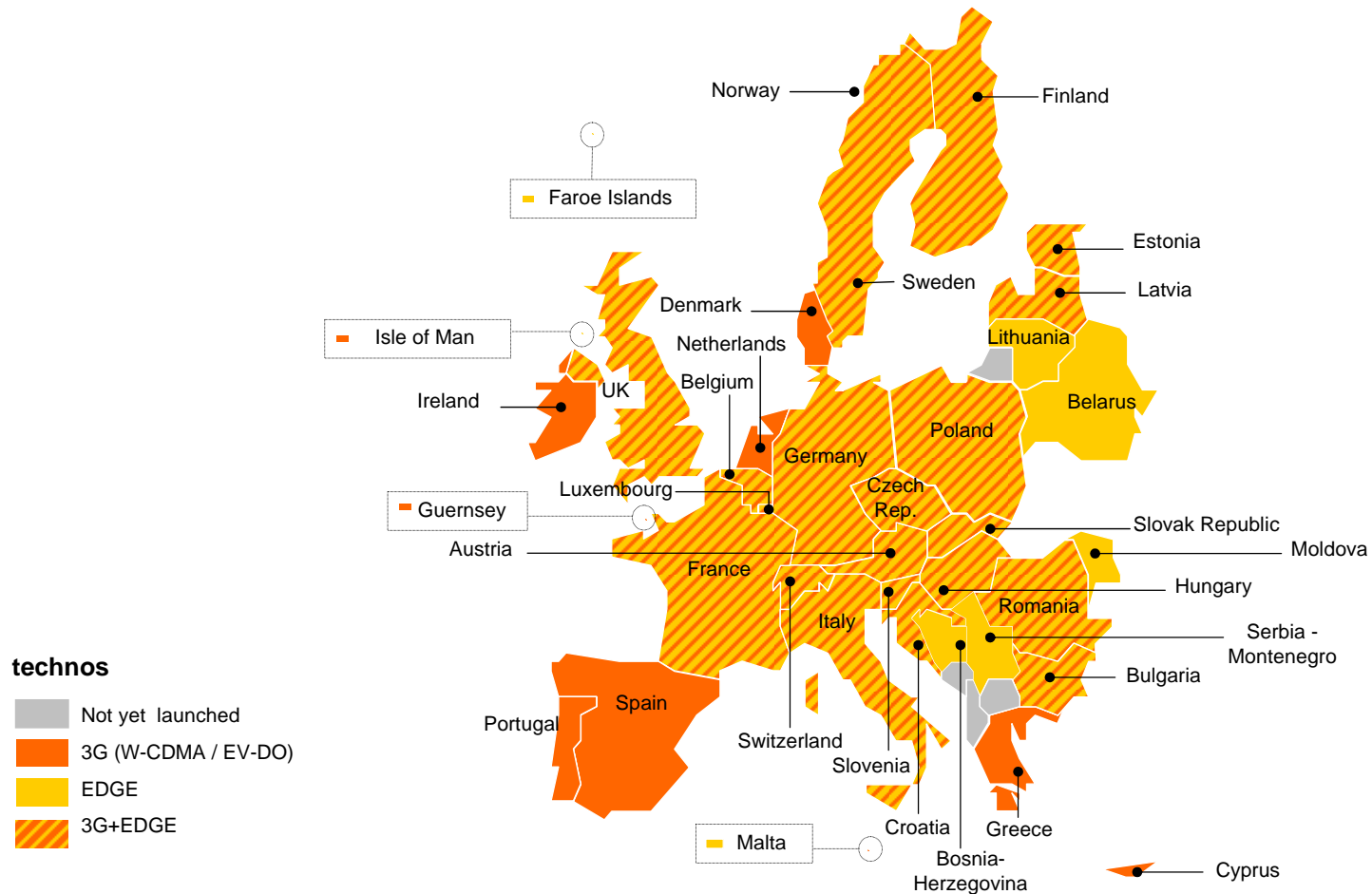


W-CDMA & EDGE map - World

Source: Sofrecom (18th September 2006)

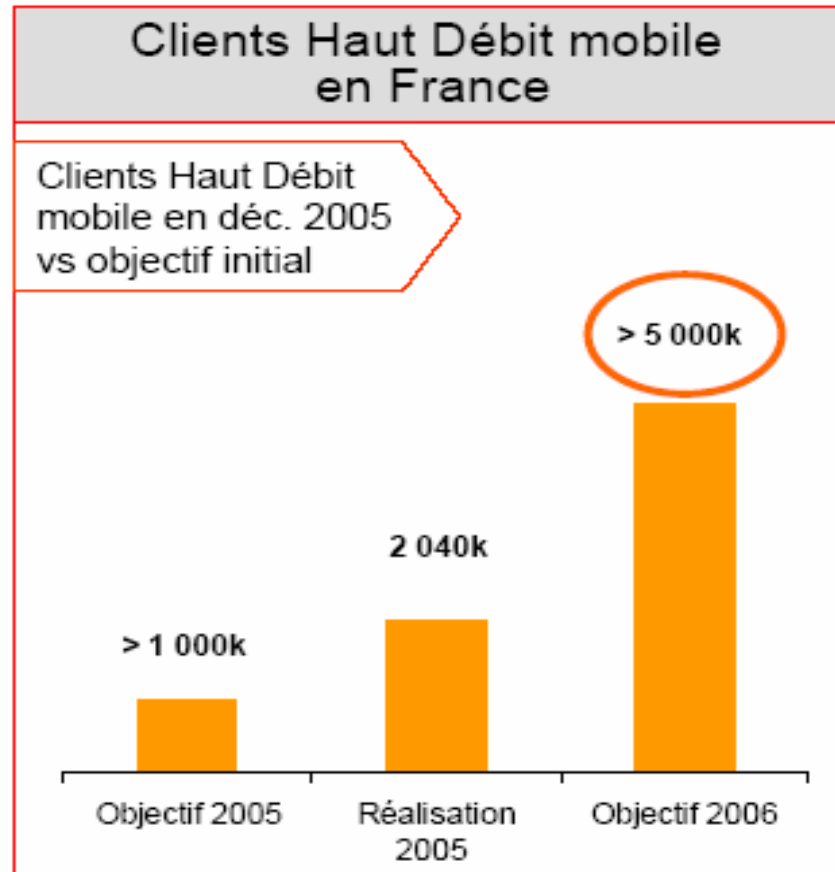
Overview of mobile broadband in Europe

W-CDMA & EDGE map - Europe



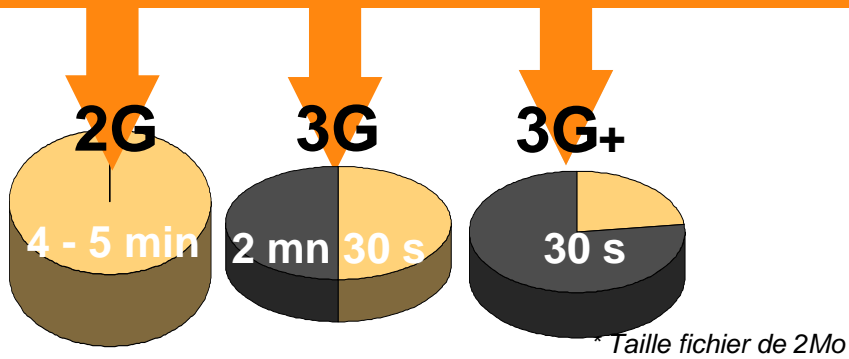
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The growth of mobile broadband in France

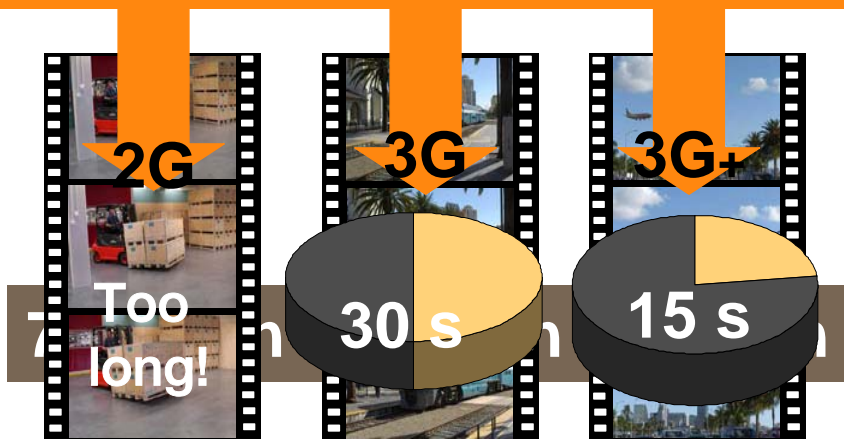


Higher speeds improve customer experience

Download Music MP3*



Download Video*



Mobile TV

VOD

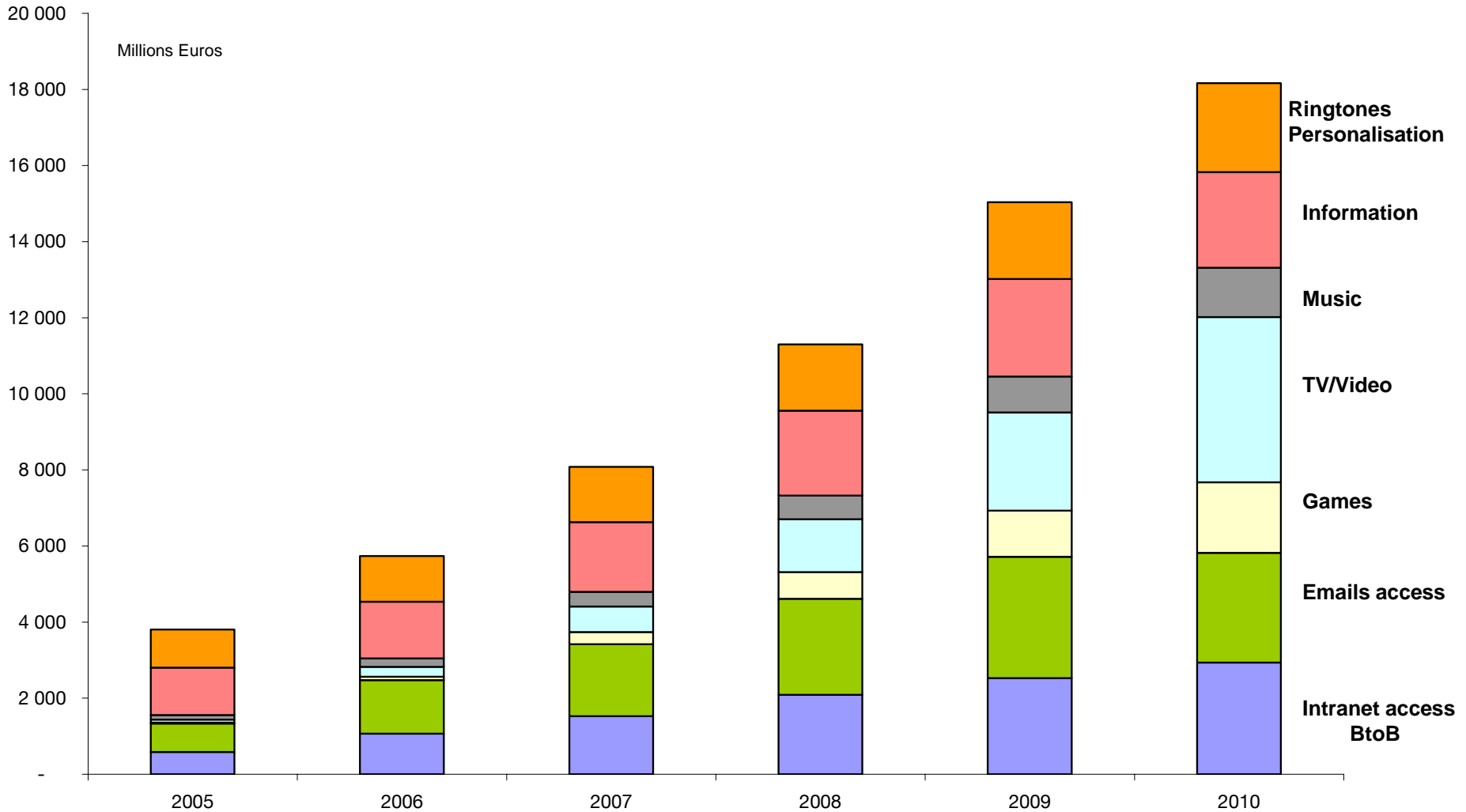


Live TV



« Instantaneous »

Multimedia mobile services to show significant growth in the years to come



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Orange, the leader in mobile broadband

98% of the population covered

- 95% of the population covered by EDGE
- nearly 60% of the population covered by 3G
- 9 cities covered by 3G+, 20% of the population covered by end 2006
- more than 30,000 Orange wifi access hotspots

The Orange mobile broadband strategy

E and GP Usage		Technology	Network	Max bit-rate
E-mails Intranet Work applications	Video conferencing	WiFi	Network of WiFi Hotspots	5 Mbit/s
	View / Video	HSDPA	Adaptation of the existing UMTS network 1900 - 2170 Mhz frequencies	1.8 Mbit/s
	View / Video	UMTS	New network architecture 1900 - 2170 Mhz frequencies	384 Kbit/s
	Video	EDGE	Adaptation of the existing GSM network 900 - 1800 Mhz frequencies	200 Kbit/s
	Photo MMS	GPRS	Adaptation of the existing GSM network 900 - 1800 Mhz frequencies	50 Kbit/s
	Text SMS	GSM	900 - 1800 Mhz frequencies	9.6 Kbit/s

Always more bandwidth for ever greater development of new source of revenues through new services

A strong increase in the mobile multimedia equipment of Orange clients...

	Equipped clients	% total equipped	<i>Growth over one year</i>
Multimedia / Wap	19 M	88 %	+ 10 %
Cameras	8,6 M	40 %	+ 75 %
Orange World Music	2,3 M	10 %	+ 310 %
Broadband handsets	2 M	9 %	+ 510 %



- 40 % of Orange sales are broadband handsets
- 22 of the 40 mobile references are broadband handsets

... resulting in a large increase in multimedia services

TV-Video

- 5 million sessions per month
- > 300 000 active users

Music

- > 3 million music full track downloads since beginning of the year

Games

- More than 1 million Orange clients have purchased a game in the last 12 months
- Doubling of sales of java games (S1 2006 vs S1 2005)

MMS

- Growth of 72 % in turnover (S1 2006 vs S1 2005)

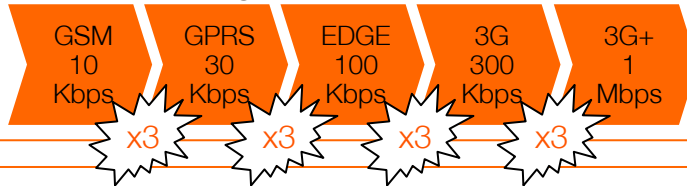
Wap and mobile portals

- More than 4 million active users in August
- WAP traffic increased 4.5 times from S1 2005 to S1 2006

3G+ (HSDPA), advantages shared by both customers and operators

Downstream rate increase

- noticeable increase of the downstream rate
 - theoretical maximum rate: 1,8 Mbps/user
 - average expected rate: 600 Kbps to 1 Mbps/user



Greater speed

Reducing latency time

- Services fluidity increase such as web browsing
- HSDPA 100 to 120 msec
 - 3G: 200 to 250 msec
 - EDGE: 600 msec
 - GSM: 1 sec

Greater comfort

Network capacity increase

- increase in network capacity of from 50 to 200%
 - Enables a larger number of clients to connect to the same place, at the same time

Greater usage

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Orange, the pioneer of mobile TV

Dec 04

June 05

June 06

Nov 06

3G
Launch of
mobile TV services



EDGE
TV service is accessible
to nearly 90%
of the population



Launch of unlimited TV multimedia Options Launch of mobile HD TV

option TV	<ul style="list-style-type: none"> la TV comme à la maison, soit près de 20 chaînes : les chaînes nationales et de la TNT dont M6, France 2, France 3, LCI mobile, W9, NT1... la vidéo à la demande : humour, clips musicaux, sport, bandes-annonces, people... 	ILLIMITE 6€/mois
option totale TV	<ul style="list-style-type: none"> la TV comme à la maison, soit plus de 50 chaînes : les chaînes de l'option TV + plus de 30 chaînes thématiques dont RTL 9, Trace TV, M6 Music Hits, Infosports... la vidéo à la demande : humour, clips musicaux, sport, bandes-annonces, people... 	ILLIMITE 10€/mois

Orange World
TV HD mobile



En savoir plus... : consultez le détail du programme >>>

chaînes
TV HD mobile

Les thématiques



ABONNEZ-VOUS MAINTENANT!
1 MOIS GRATUIT!

Meeting customer expectations for mobile TV

Our clients ask us for

HD mobile TV at Orange

An improved picture quality



«HD mobile TV» quality never yet seen on mobiles

A varied and appropriate content



Greater content and access to 50 TV channels and 2,500 videos

An all-inclusive tariff offer and unlimited TV/Vidéo package

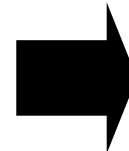


Watch TV without limits or constraints

“HD mobile TV Brand”

A premium video profile...

	3G Profile	HD Mobile Profile
Encoding bandwidth (total)	100 Kbps	250 Kbps
Resolution	QCIF(176*144)	QVGA (320*240)
Codec Video	MPEG4	MPEG4 / H264
Codec Audio	AMR ou AAC	AMR ou AAC
No. images / second	6,5 - 15	> 15
Broadcasting mode	Streaming	Streaming



■ More pixels

Resolution increased 3 times over

■ More

bandwidth

Video bandwidth

increased 3 times over

■ More fluidity

Generalisation at 15 images/s

Conditions to access to mobile HD TV service

Get a compatible HD mobile handset

+

Subscribe to « **Totale TV HD mobile** » option

+

Be under 3G/3G+ **coverage**
(HD mobile service accessible for 60 % of population)



Samsung Z560



Price = 149 €*

Sales target = 10 000 mobile HD TV options (nov/dec 2006)

*with ODR / 50 €

Direct access by the mobile screen



TV/Video key
Direct access

Orange World
TV HD mobile

A la TV ce soir TOP 5 Vu sur le net

En savoir plus... : consultez le détail du programme >>

chaînes TV HD mobile

Les thématiques

Actu	Sport	Cinéma
Musique	Humour	TV/Séries
Cartoon	Live Cam	Charme

ABONNEZ-VOUS MAINTENANT ! 1 MOIS GRATUIT !

Unlimited Access

Full screen

Orange World
Vidéo

Toutes les chaînes

2	3	6
RTL 9	4	5
AB1	arte	PARIS PREMIERE

Page 1 | 2 | 3 | 4 | 5 >>

Chaînes par genre

Généralistes	Sport
Musique	Découverte
Info	Cinéma
Divertissement	...



Conclusion

Orange promotes services, not technology

All these new technologies are source of growth for developing new services

Orange is leader in innovation

for pricing : unlimited bundle for TV pricing

for services : first launch of hd mobile tv in Europe

Questions and answers

Thanks

Annexes

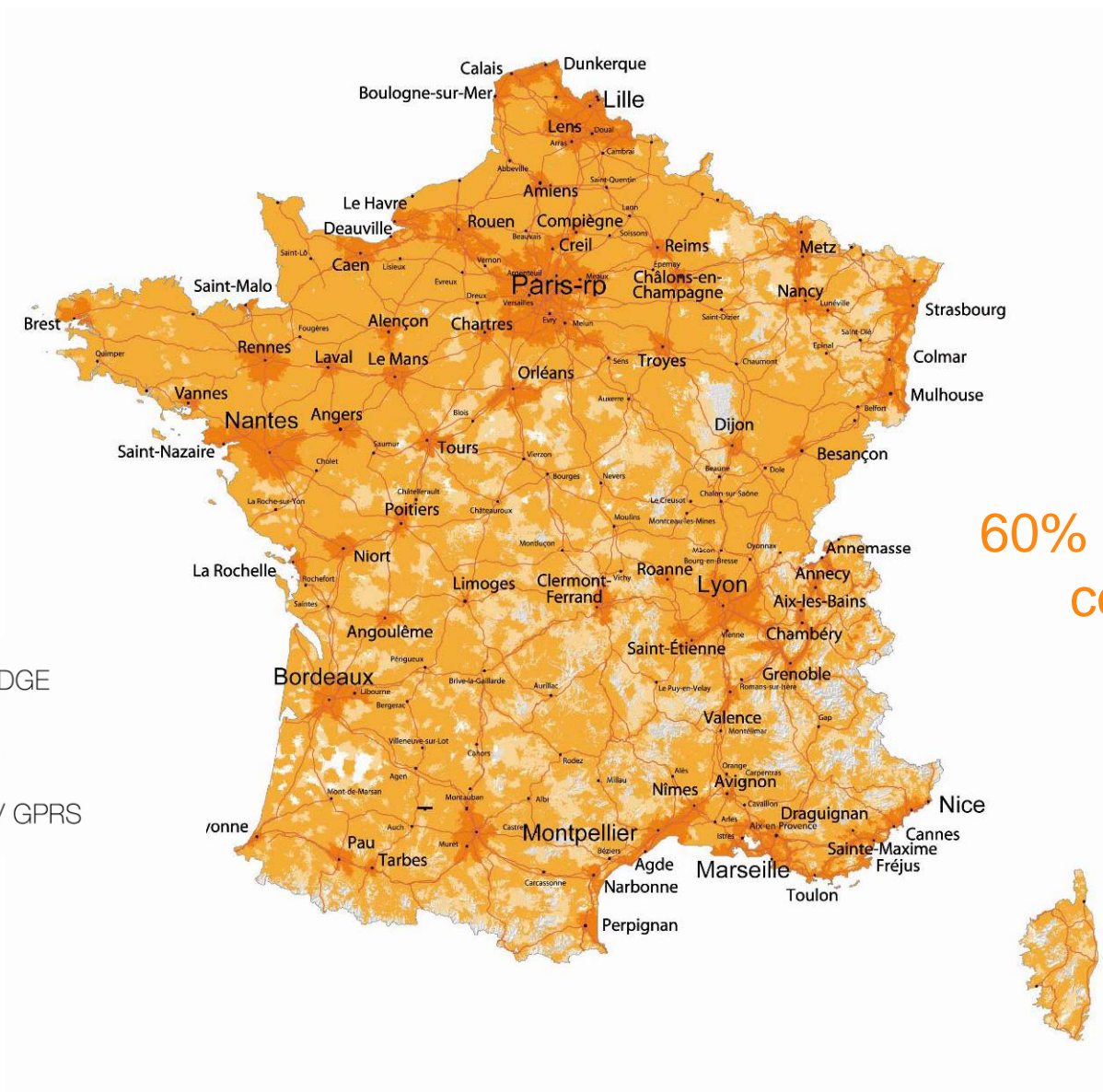
Couverture Orange GSM/GPRS



GSM/GPRS

98% de la population
couverte fin 2006

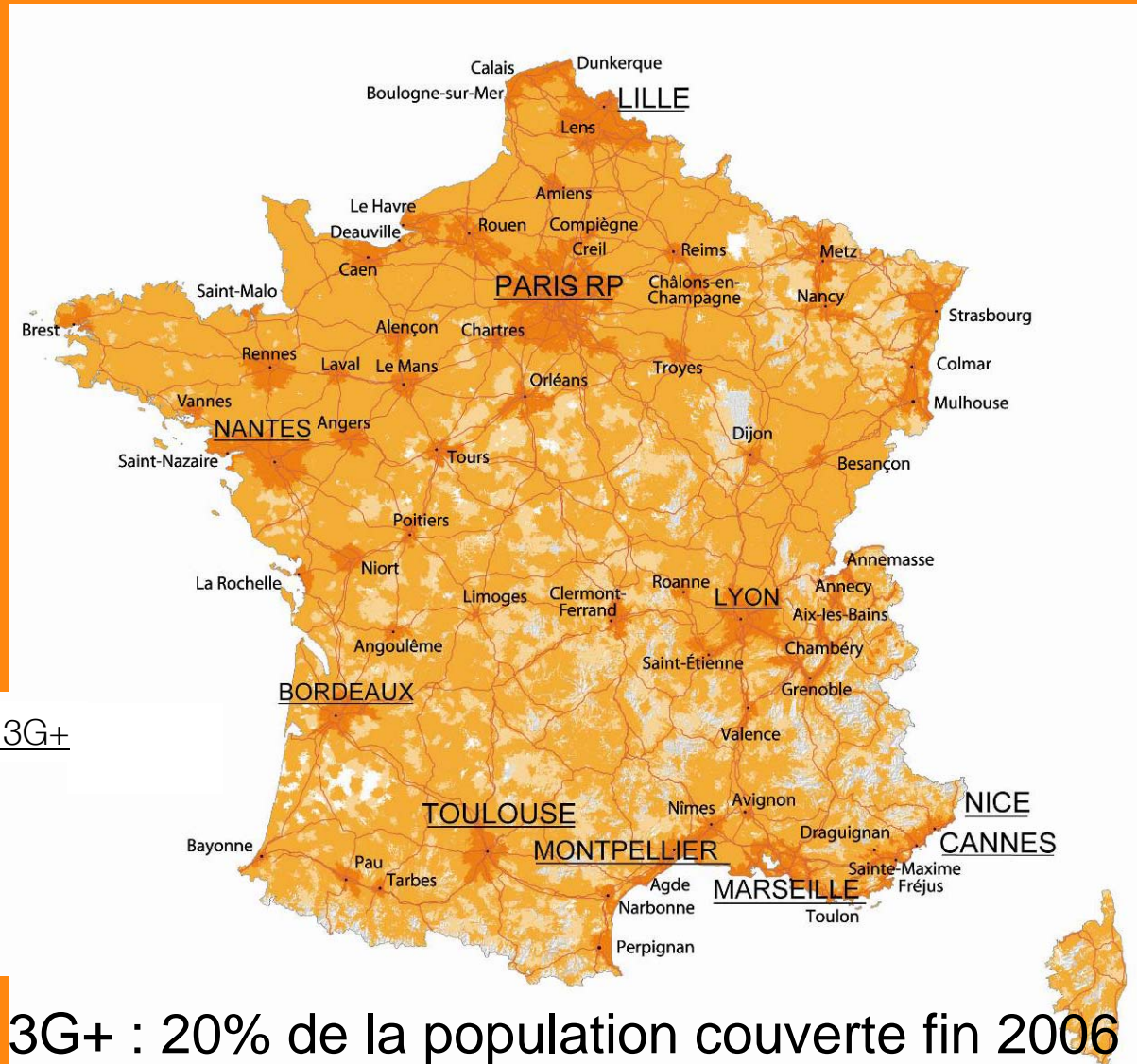
Couverture Orange GSM/GPRS, EDGE et 3G



3G

60% de la population
couverte fin 2006

Couverture Orange et 3G +



Functionalities are converging into a single device



HD TV mobile phone



NFC technology experimentation



Apple iPod



BlackBerry Pearl



SPV M3100

Convergence of designs



GSM / Wi-Fi and other hybrids



«SIM-inside» PC

Des services TV à développer pour capitaliser sur notre réseau mobile

Applications embarquées ou distantes

- Rich média pour faciliter la navigation
- PVR mobile et convergence avec le fixe
 - Moteur de recherche VOD

Complémentarité de couverture

- Le DVB-H ne pourra pas être nationale rapidement (fréquences dividende numérique)
- Gestion transparente du passage de l'unicast au broadcast (suppose une qualité homogène)

Contrôle d'accès aux chaînes via la carte SIM

- Solution mise en place avec Viaccess pour l'expérimentation DVB-H et qui est normalisée OMA et DVB



Développer les services interactifs

(pas de voie de retour en broadcast)

- Développer de nouveaux formats publicitaires
 - Améliorer l'expérience client du voting
 - Mettre en place un EPG dédié

Contrôle de la mesure d'audience / CRM

- Pouvoir quantifier l'audience avec une précision inédite pour les médias et offrir des services adaptés à nos clients

Offrir plus de services que ne le permet le DVB-H

- 20 chaînes en DVB-H contre 52 en 3G
 - VOD en 3G 45% du trafic
- Nouveaux formats (podcast, videocast...)
 - Radio numérique
 - Chaîne ORANGE

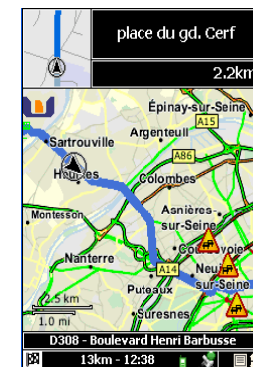
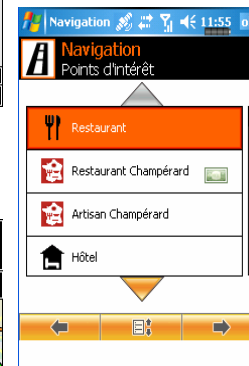
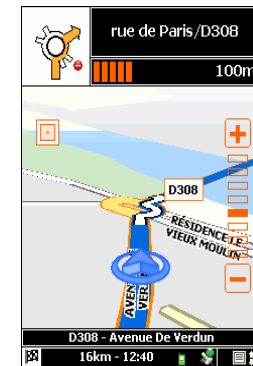
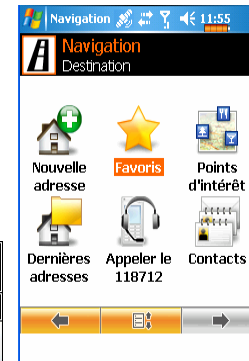
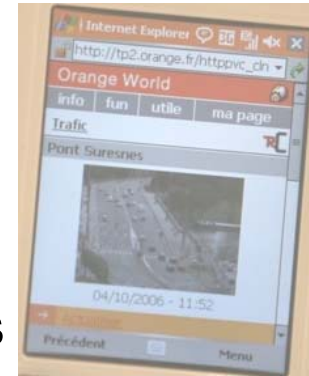
The path forward for mobile TV

Combining multiple complementary multimedia access networks to deliver seamless services

- Combine telecom networks and DVB-H for best-in-class mobile TV services
 - Complete geographical coverage
 - Wide selection of TV content (54 channels available today)
- Provide a simple, convenient high-quality mobile TV experience
 - Unified user experience provided, regardless of access technologies
 - Consistent viewing quality with HSDPA & DVB-H
- Deliver personal media on demand
 - Short VOD
 - Personal programming
 - Replay and time-shifting

Les nouveautés de la navigation Orange V7

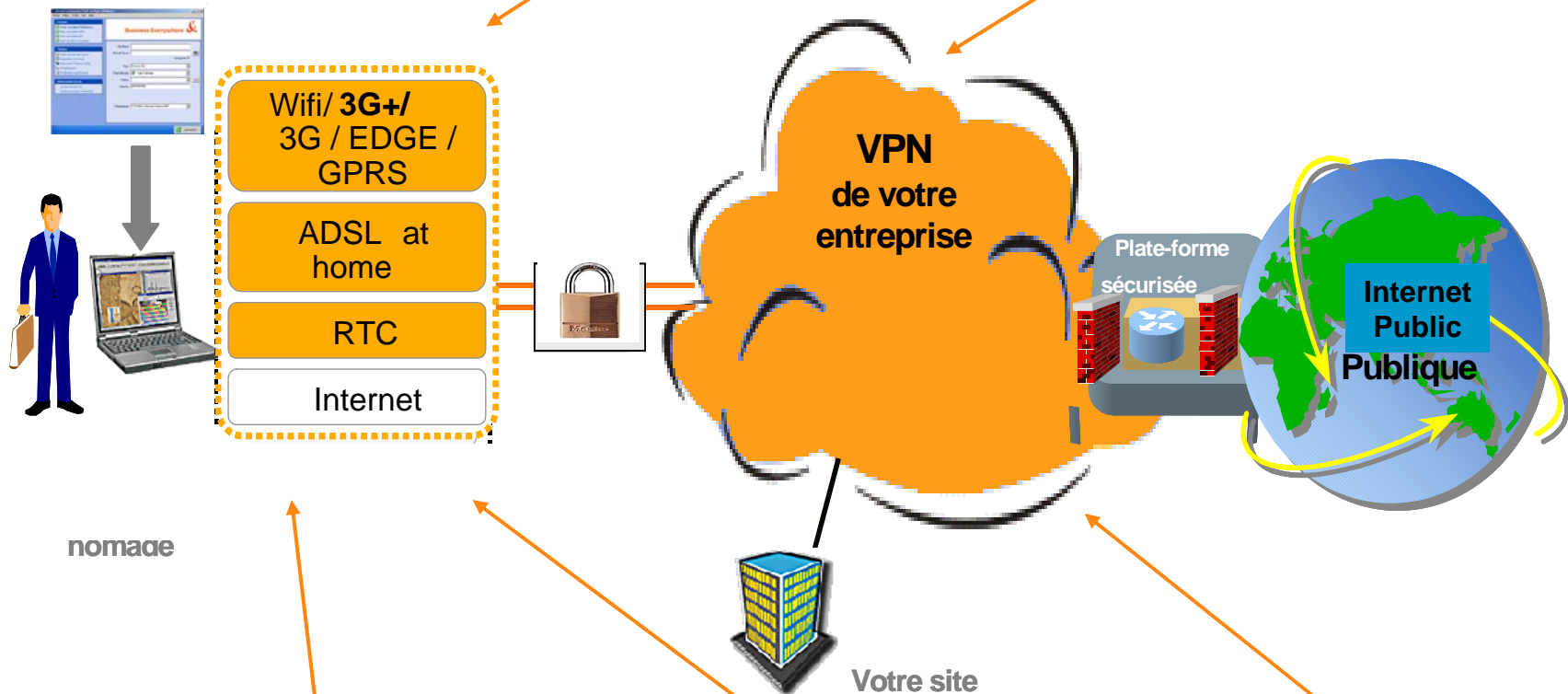
- Nouvelle interface :
3D, nouvelle ergonomie, nouveaux graphismes
- Téléchargement de destination par le 118712 :
plus besoin de saisir l'adresse manuellement
- Et toujours :
 - l'information trafic intégrée,
 - 20 pays d'Europe,
 - des cartes automatiquement mises à jour,
 - guidage piéton,
 - une application souple, pratique et efficace



Convergence with Business Everywhere, a concrete example of our integrated operator strategy

A single connection kit
A single access code

Roaming access
wherever you are



nomade

Votre site

A large range of
compatible terminals

Controlled access for
greater security

The best technology
with complete transparency

Convergence with unik: a single mobile and home telephone

- A single telephone
- A single number
- A single address book
- The best network / the best rate



A new generation of telephones

Thanks to a fluid connection on the most appropriate network

unik: simplicity for clients