



**May 31<sup>st</sup>, 2005**

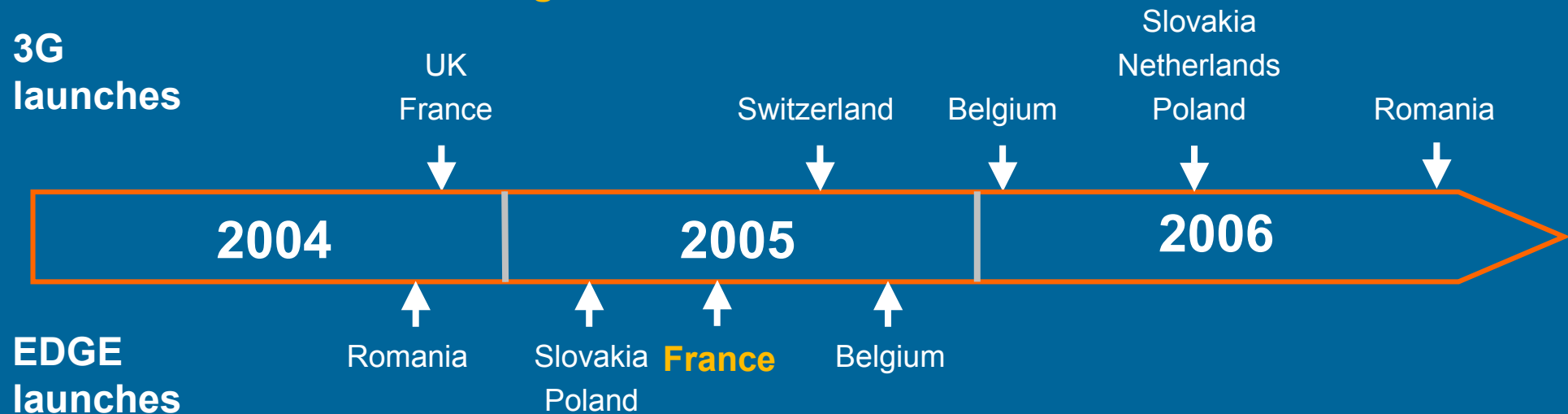
**Orange France  
Mobile Broadband strategy**

# Broadband at the heart of France Telecom Mobile strategy



- EDGE / UMTS deployment and mass-market launch phase (2004-2006)
  - EDGE deployed to provide a richer experience to as many customers as possible
  - UMTS deployed across footprint to compete in key areas (large cities), address high value segments and satisfy regulatory constraints

## Orange mass-market launches



# 2 million customers expected in 2006

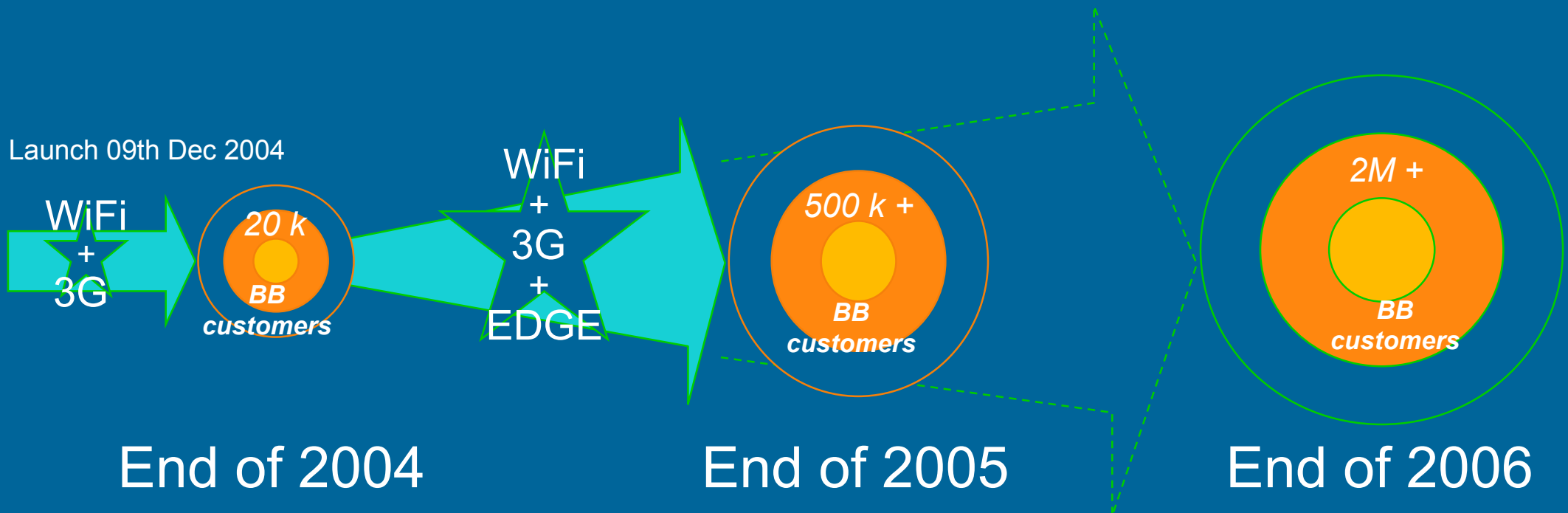


- 3 years of Orange leadership, with 3 complementary technologies

2003 : WiFi network

2004 : 3G development

2005 : EDGE launched



# Mobile Broadband : 3 different technologies for the widest domestic coverage



## WiFi

More than 8 000  
Orange hotspots access  
to mails, intranet, dedicated  
applications

## 3G

The best of mobile  
broadband in big cities  
visio + TV live + vidéo  
+ music

## EDGE

National coverage of mobile  
broadband  
TV live + video + music



2003

2004

2005

5 Mo/s

384 Kbps

100-200 Kbps plus rapide:  
mobile avec la 3G.



# First step for Mobile Broadband : WiFi hotspots in 2003



## ➤ A wide coverage WiFi network

- First WiFi network in France : more than 8 000 hotspots in 600 cities
- Launch of roaming in France and in 23 countries

## ➤ A booming traffic

- Strong traffic growth : + 20 %/month in 2004
- More than 1 M mn per week
- Average length per session 43 mn



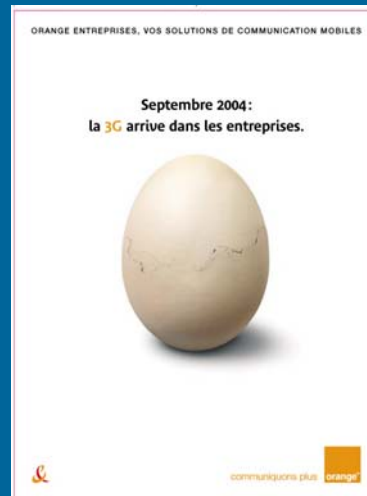
## ➤ Numerous compatible devices

- More than 2 million professional laptops are WiFi enabled
- More than 80 % of new laptops are WiFi enabled
- Some smartphone and PDA are already WiFi enabled

# Second step for Mobile Broadband : launch of 3G network in 2004



September, 2004  
launch for Enterprises



December 2004, launch for Residential



# Third step for Mobile Broadband : EDGE for an extended coverage



## ➤ WiFi

- 8 000 Hotspots with 1Mbps (per user) in more than 600 cities in France

## ➤ 3G

- 45 % population coverage with up to 384 Kbps bandwidth

## ➤ EDGE

- Up to 85 % population coverage with up to 200 Kbps bandwidth
- 90 % Enterprises covered by EDGE (\*)

(\*) Source : INSEE Base related to more than 50 employees companies

# Orange, First mobile broadband network for residential



- **Mobile broadband with extended coverage (up to 85% of French population) with EDGE**
- **A new range of devices for everybody**
- **The richest and most complete offer of the market**
  - TV live : 31 channels available
  - Video : 300 new videos each week
  - Music : a quasi real time up date
- **Data abundance for multimedia offers**
  - « Orange World Intense » options : TV live for free and unlimited during WE
  - « Orange Intense » : free voice traffic after the 3 first minutes
- **Convergence offer with France Telecom fixed for visiophonie**



# Offer a unique Orange user experience

## Orange World multimedia services



- Mobile portal available in all our European markets (except Poland)
- Distinctive icon: one click access to Orange World on signature devices
- Segmented portal experience, with dynamic homepage
  - Constantly updated, content-rich
  - Not a static icon menu
  - “Add to your page” easy personalisation feature
- Open browsing
  - Surf internet without restrictions
  - Not a walled garden
- Addressed to a large customer base
  - Optimised for Signature devices
  - Accessible on all wap phones and smartphones
- Some of the key mobile multimedia services will be extended to the web/PC environment

# Orange Intense Multimedia offer : 3 pillars with TV live, Video and Music



**TV live :** *Regarder la télé sans rester devant*

Exclusiv for Orange Intense clients



**Video**

*C'est mieux de voir ce qu'on entend*

Broadband quality



**Music**

*Sortez avec la musique qui vient de sortir*

New

**Je sors**  
avec la musique qui vient de sortir  
Toute l'actualité musicale en temps réel

Pour connaître toutes les nouveautés, accédez sur Orange World aux playlists des radios partenaires. Avec NRJ, Skyrock, Fun Radio ou Europe 2, vous serez à la pointe de la tendance!

Profitez des offres Orange Intense pour découvrir les tout derniers titres, acheter un CD ou télécharger un logo ou une sonnerie.



# Key to the success of Orange Intense : TV live



## Orange Intense Exclusivity

31 TV channels available  
And more to come



## Orange TV means

The most numerous programmes  
Strongest audience programmes

Already a successful offer

Orange Intense video users (March 2005)	Average length min/active user/month (March 2005)
55 %	25

Top 3 chaînes



Orange Intense, le haut débit mobile pour tous en France

Regardez la télé sans rester devant la télé

avec l'option Orange World Intense ou le forfait Orange Intense

31 chaînes de télé gratuites et illimitées en direct sur votre mobile pendant 2 mois

communiquons plus

# Video : for increased usages



*A wide and permanently updated offer*

*A convincing service offer*



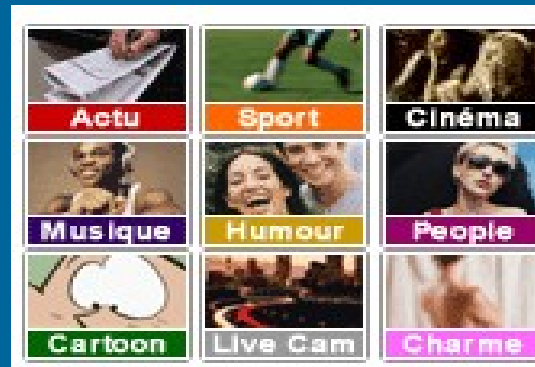
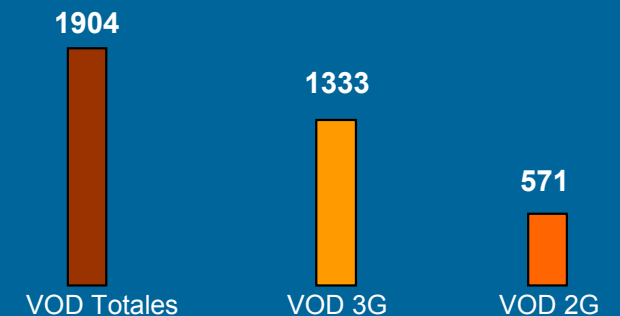
**9 Themes**

**More than 45 programmes**

**300 new videos/week**

- Listen to music and watch musical clips
- Be informed on live and with images
- Know L1 results on live and with video

Number of clicks for the Pope funerals  
From 8/04 10h00 to 9/04 10h00



**Top 3 services**



# Music : an innovative offer focussed on news

Orange World Musique : latest music on the move

Orange Intense, le haut débit mobile pour tous en France




Sortez avec la musique qui vient de sortir

avec Orange Intense, retrouvez sur votre mobile playlists, hits des plus grandes radios et clips des derniers tubes

 Cartes bleues compatibles en part de monde.  
Orange France, SA au capital de 3 000 000 000 € - RCS Nanterre  
400 700 000 - 01 69 30 00 00 - 10 rue de la République - 92000 Nanterre **communiquons plus** 

News, Singles, Clips  
Buy CD, concert tickets...  
Ring tones, logos...  
News...



Orange World 

Musique

Les Tops Ma Musique Live

Nouveautés

> American Idiot - Green Day  
> Get Right - Jennifer Lopez

Radios

> Unwritten - Natasha Bedingfield  
> Enjoy the ... - Depeche Mode

Sonneries

> Tekito? - Rachid Taha  
> Keine Lust - Rammstein

Par genre :

Rap - RnB

Valider

Rechercher

OK

Voir aussi

> Sortir > Vidéo  
> Chat > IM

Les Tops Ma Musique Live

> Orange World  
> Infos légales  
> Mode d'emploi

# Orange Intense for Residential first results



## First customer profile



- 52 000 residential clients
- Urban type
- Rather young < 35 years old
- A high ARPU (cc. 105 euros)
- Strong multimedia users

## Very encouraging first results



- 80% of clients uses Orange World
- 50% user for Video and 40% for TV live
  - 10 videos / user / month
  - 26 min TV live / user/ month
- Key successful themes : news, sport, music and films
- 25% user for visiophonie

# Orange First mobile broadband operator for Enterprises



September 2004



Launch of « Business Everywhere Découverte 3G »

November 2004



Launch of Business Everywhere flat fees  
« Heure » and « Volume »  
Launch of Business Everywhere integrated  
offer (including 3G) by France Télécom

December 2004



Launch of Orange Intense Enterprises

March 2005



EDGE first trials for our Enterprise customers

18 April 2005



**Commercial offers for Enterprises integrating EDGE**



# Orange, First mobile broadband operator for Enterprises



- **Devices** : the widest choice for mobile broadband handsets :
  - 3 PC cards 3G/2G, 3G/2G/WiFi, **WiFi/EDGE/GPRS** (Sony Ericsson GC89)
  - 7 mobile broadband devices 3G, EDGE, EDGE/3G (including Edge PDA Treo 650)
  - to be extended by year-end
  
- A wide offer :
  - **Business Everywhere** from a PC with tariffs according to time, or volume, or pure flat fee
  - **Data option** according to volume in addition to voice telephony
  - **Orange Intense Enterprises**, bundles of voice, SMS and MMS
  
- **Data roaming** solution to access an international coverage
  - EDGE : 20 countries in April
  - 3G : 13 countries in April
  - WiFi : 10 000 hot spots in 23 countries
  - GPRS : 75 countries in April



# Orange Intense for Enterprises first results



## 3G Enterprises is a Success



- almost **17 000 3G Enterprise Clients** (as of April 2005)
- A vast majority of 3G offer regards **Business Everywhere** (laptop Offer)

## Strong growth of usages



- **3 times more data usages** since 3G launch (in 6 months) and **+ 50% since EDGE** commercial launch)
- 17 Mo in average per month for **Orange Intense Enterprises** customers

# Orange broadband offer leverages on France Telecom integrated business model



- Orange is the only operator to offer a simple and seamless access to mobile broadband with a national coverage
- France Télécom is the only operator offering an integrated broadband offer fixed-mobile with Business Everywhere
  - Broadband access whatever the technology (ADSL, WiFi, 3G, EDGE )
  - All in One bundles
  - Easy to install and to use connection kit



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