



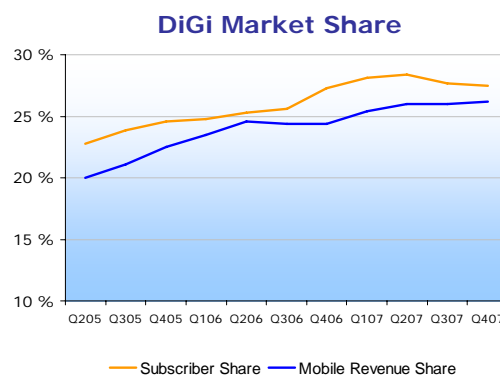
Mobile Broadband Challenge

Telenor Capital Markets Day
June 2008

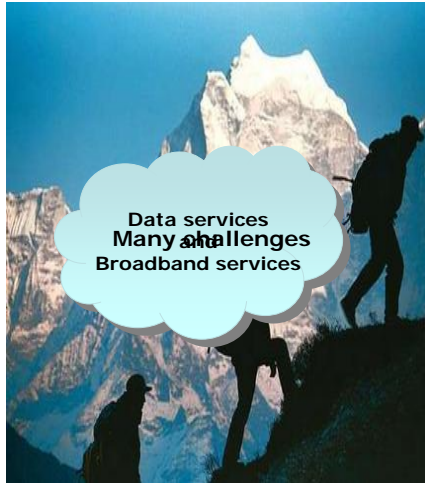
Johan Dannelind, CEO of DiGi

DiGi on the rise

- Started in 1995 as the smallest operator
- Revenue market share from 17% in 2004 to 26% end 2007
- 32% prepaid revenue market share end 2007
- USD 5.6 bn market cap, ~2000 employees



High level of commoditization in traditional mobile services



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DiGi now has 3G license to compete!



- Completed 3G spectrum transfer
- Joint business initiatives
- Good prospects for broadband growth
- Some key benefits:
 - *additional spectrum capacity*
 - *increased network & spectrum efficiencies*
 - *positive brand impact & customer retention*

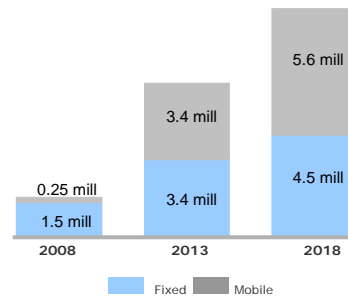


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Immature broadband market, huge upside

- Current household penetration 16%
- Demand to be stimulated by Govt initiatives
- 12 mill dial-up users
- High mobile penetration

Broadband Subscribers in Malaysia

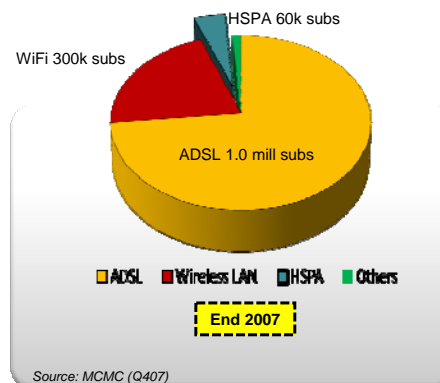


Source: MCMC Q407/Q108

Source: DiGi estimates

Broadband market currently dominated by DSL

- Existing ADSL services
 - Widely available in urban & suburban areas
 - But take-up impacted by perceived poor quality
- Wireless broadband picking up
 - Services mainly provided by Maxis, Celcom and UMobile HSPA services
 - WiMAX operators due to launch in coming months



Source: MCMC (Q407)

Targeting commercial launch in Q408



Technology

- Currently rolling out trial network
- RFP to be awarded shortly
- Seamless HSPA /3G/EDGE network



Segments

- Youth, young professionals, business
- DiGi's mobile base and EDGE users
- Big screens and small screens



Services

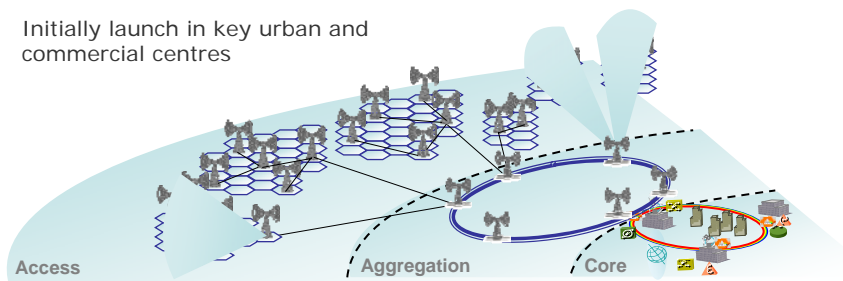
- ISP access with basic, enhanced services
- Strategic partnerships with content and service providers
- Value for money – good quality at affordable price



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How DiGi will deliver on this ...

- Build quality network supporting both broadband and 3G services
- Leverage on existing distribution channels
- Maximise existing 2G radio, access and core network & service platforms
- Capitalise on Telenor's support and synergies
- Initially launch in key urban and commercial centres



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