



The Internet for All opportunity in Asia

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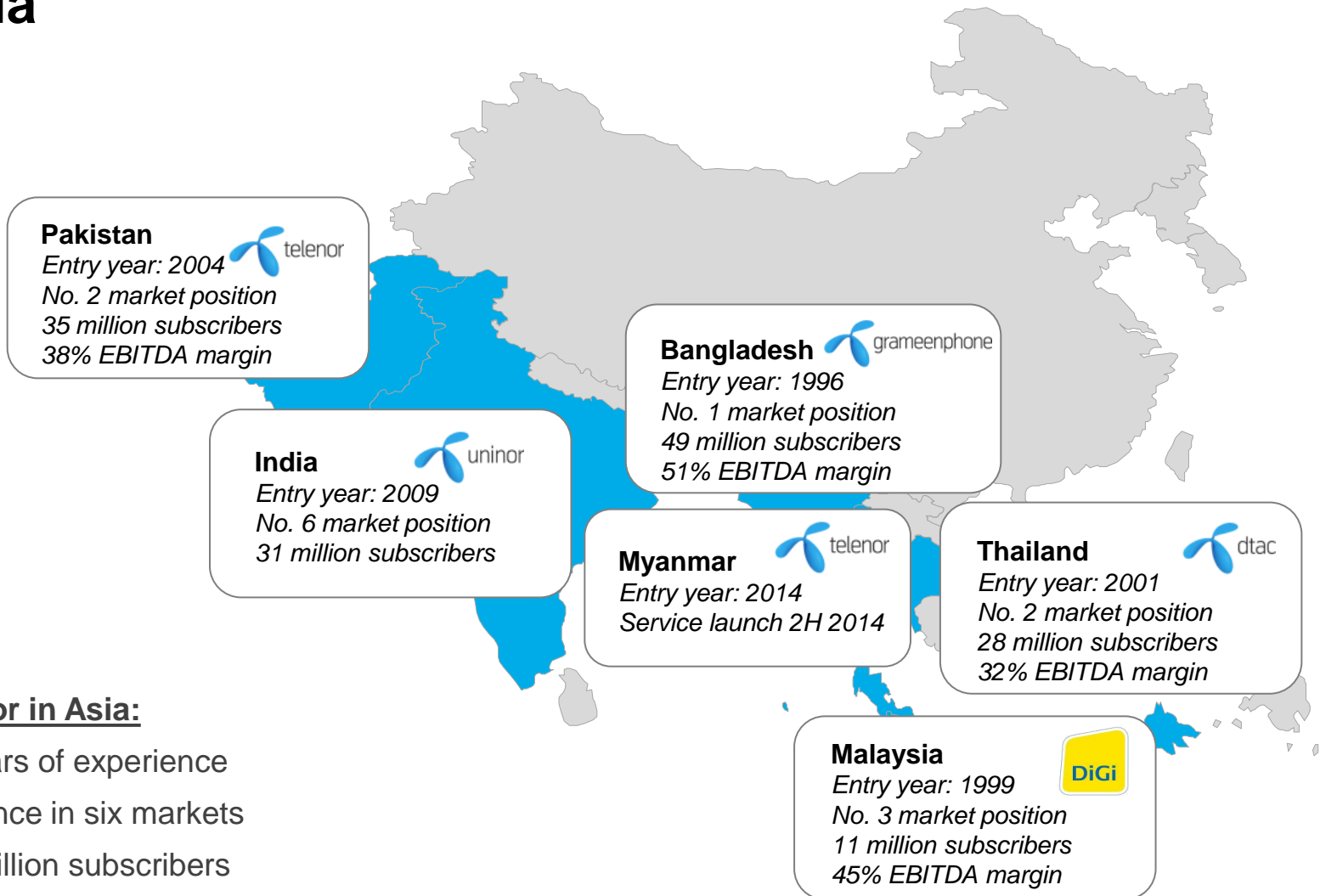
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Telenor - A strong regional provider of telecom services in Asia



Telenor in Asia:

- 18 years of experience
- Presence in six markets
- 154 million subscribers

A proven operating model

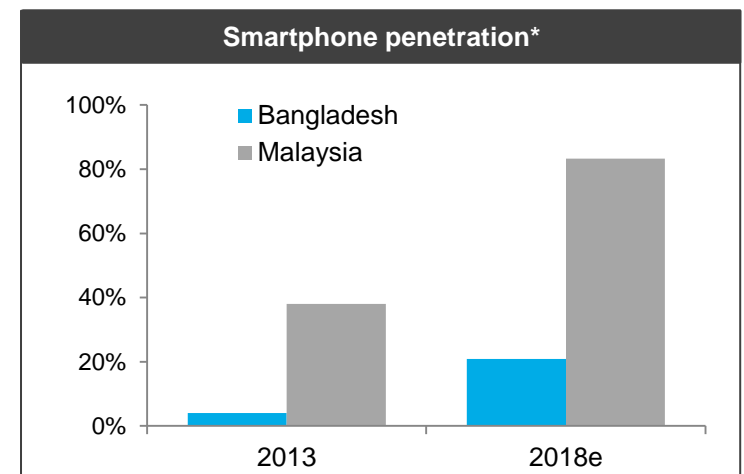
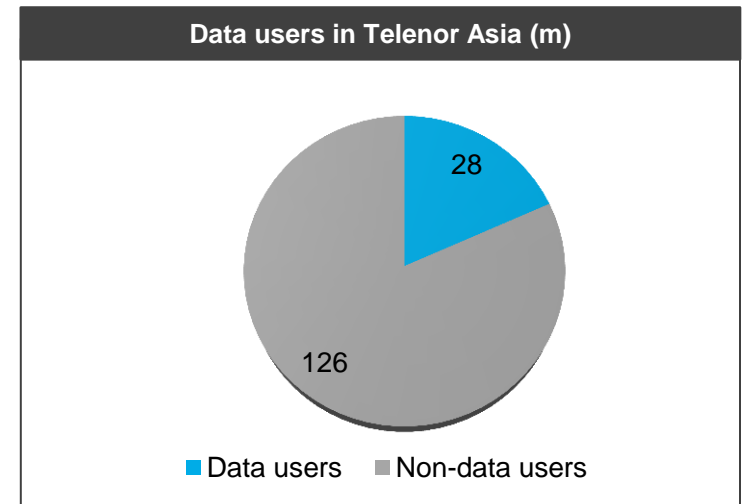
Mass market approach

Distribution capability

Low cost operations

Mobile data represents significant opportunity

- **1.2** bn people within our Asian footprint
- **154** million subscribers
- Under **20%** are active data users
- Device prices declining rapidly
- Low fixed-line penetration
- Highly interactive prepaid customer relationship



Internet for All is a strategic pillar for Telenor Group

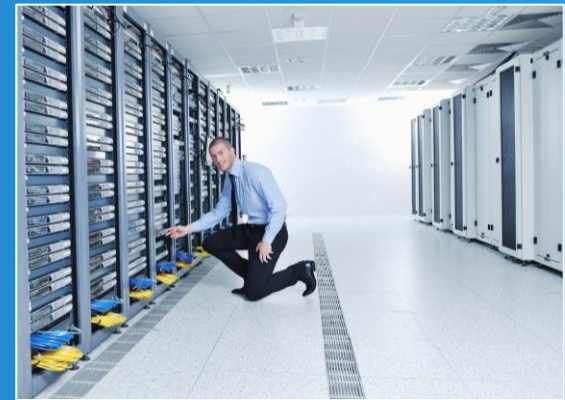
Internet for All



Passion for customers

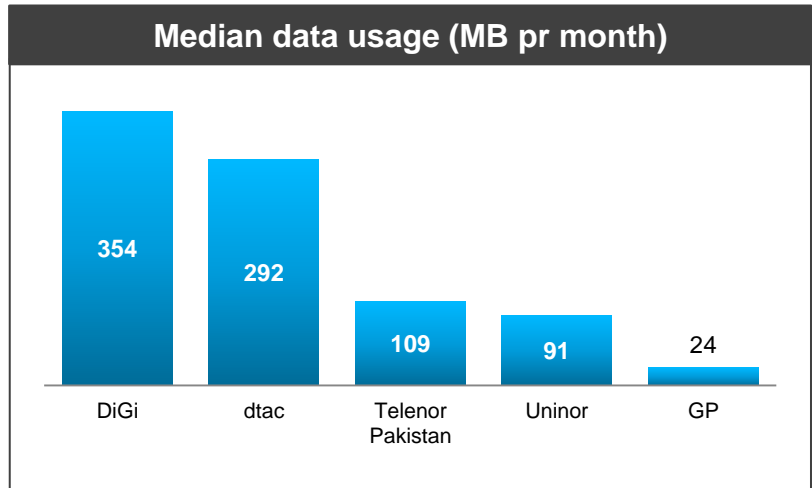
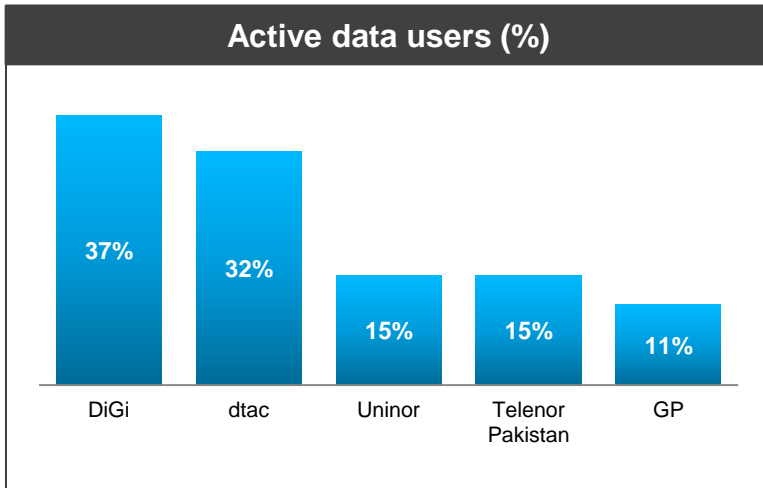
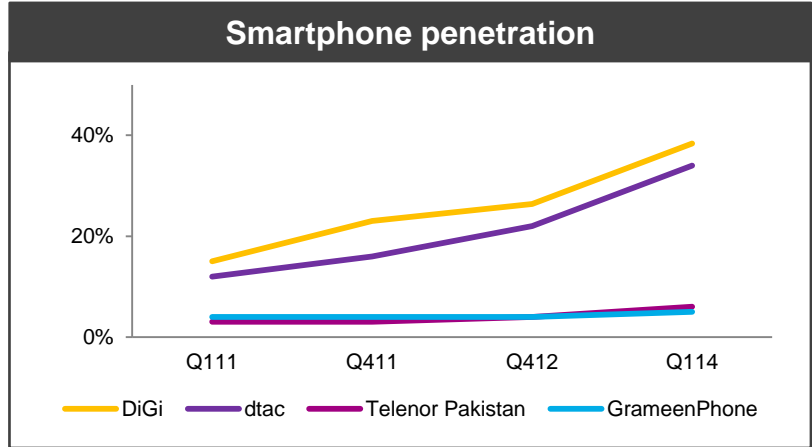
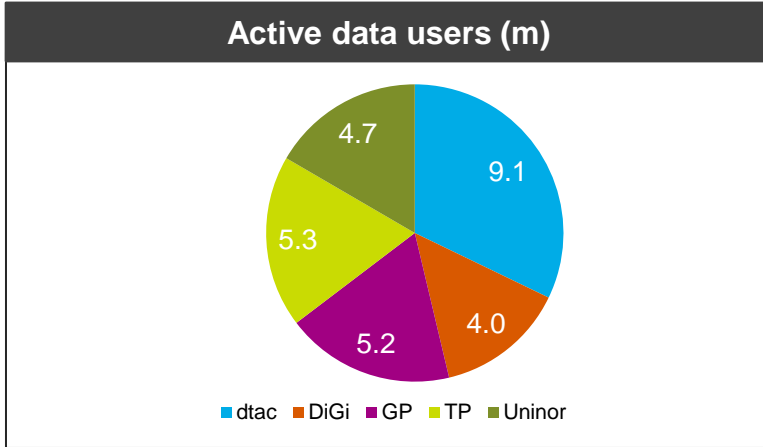


Efficient operations



Empower Societies - We provide the power of digital communication, enabling everyone to improve their lives, build societies and secure a better future for all.

Thailand and Malaysia are leading the growth - but pace is picking up across all markets

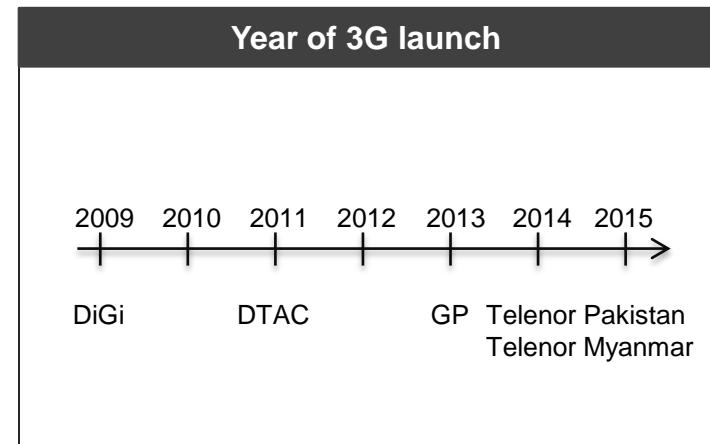
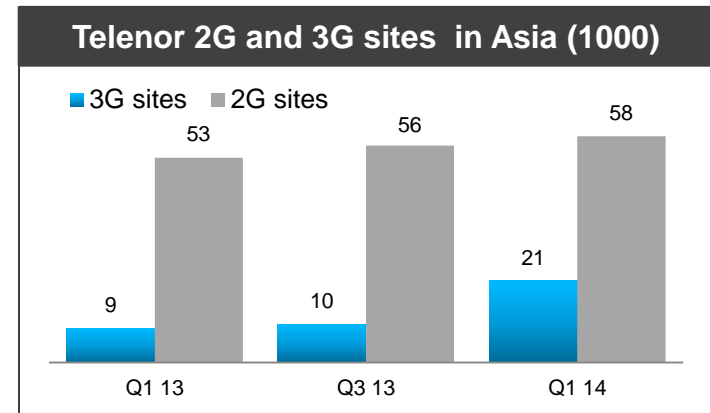


Four key elements to drive profitable mobile internet usage



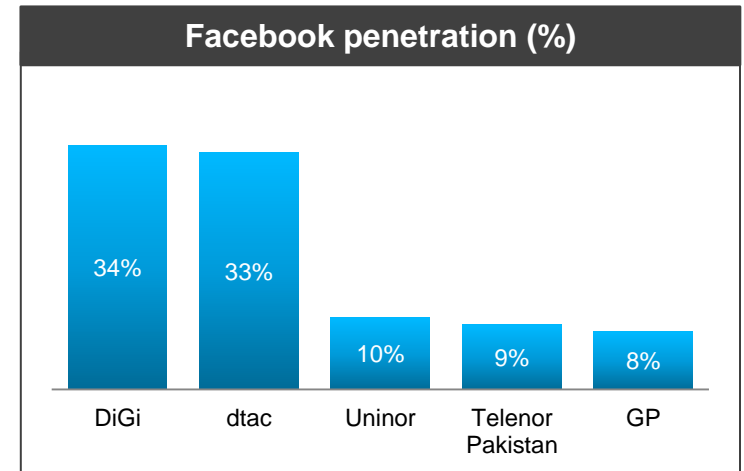
Enablers like spectrum and networks are getting in place

- **Important spectrum secured**
 - 2.1 GHz in Thailand, Bangladesh and Pakistan
 - Additional 1800 MHz in India
 - 900 MHz and 2.1 GHz in Myanmar
- **Network modernisation programmes**
 - RAN swaps completed
 - Fibre backhaul in Malaysia
 - New 3G network rollout in Thailand
- **Infrastructure sharing where applicable**
- **Steady-state capex/sales expected at ~10%**



Partnering with social media and entertainment players to stimulate usage

- Partnerships raise awareness, help discover mobile internet and drive usage
- Social media – particularly Facebook – and messaging apps are key to drive penetration
- A combination of global and local players is likely to be necessary to reach broadly
- A culture of fast turnaround and willingness to test and learn is key, e.g. digital distribution of telecom services



Several initiatives within other digital services with potential to drive internet usage

Financial services



Online classifieds

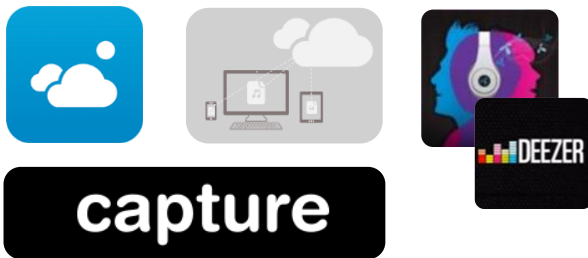
mudah.my
Malaysia's Largest Marketplace

ekhanei.com
বেচা-কেনা হরদম এখানেই জট কম

Chợ Tốt.vn
Chợ của người Việt

berniaga.com
Jualnya Gampang Belinya Senang

OTT services



mHealth and Agri services



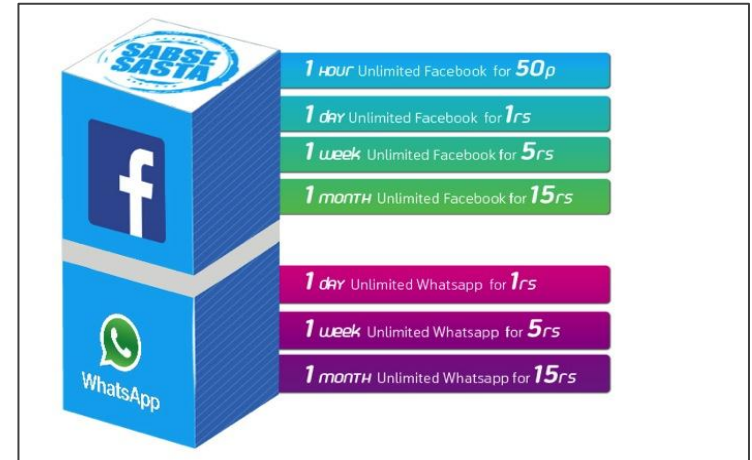
HEALTH LINE





AGRI INFO SERVICE

Pricing has to be bite-sized and focused on services

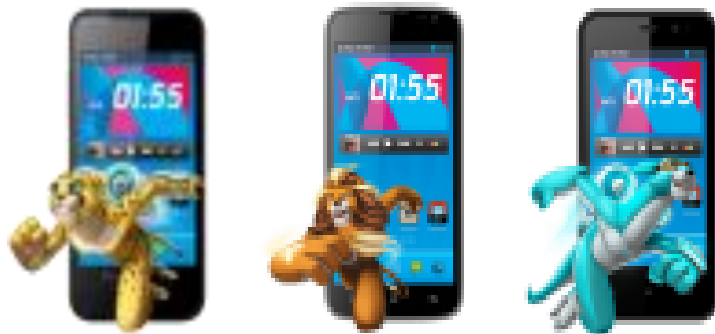
- Most prepaid customers have limited airtime balance and reload small amounts frequently
- Bite-sized and service based pricing makes data pricing easier to understand
- Campaigns and free trials are key in driving usage and data penetration
- It is critical to develop and adjust pricing as the market matures



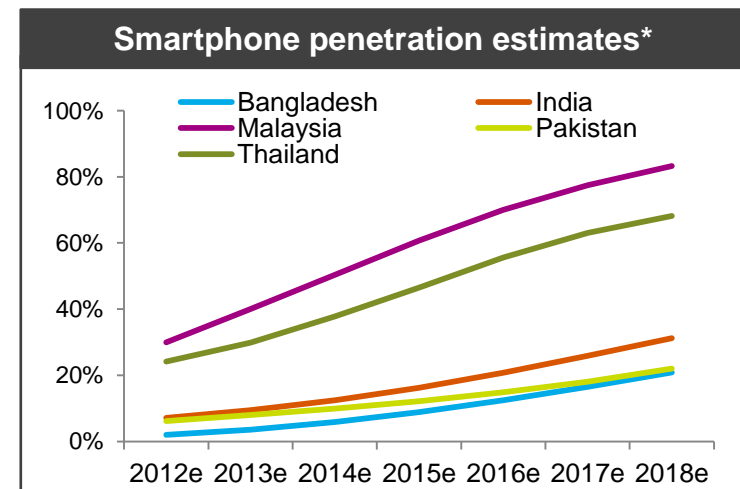
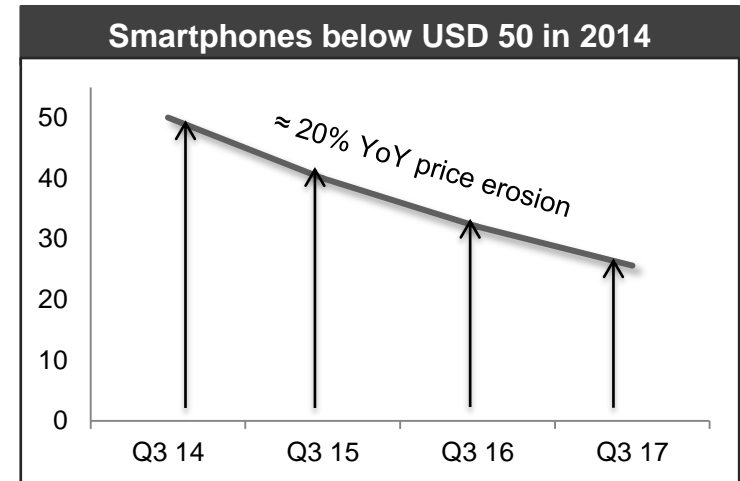
DiGi	Weekly RM3	Weekly RM5	Weekly RM7 <small>More Quota</small>	Monthly RM18 <small>More Quota</small>	Monthly RM30 <small>More Quota</small>
	Quota	0MB	100MB	250MB	300MB
Unlimited Social Messaging™ 	✓	✓	✓	✓	✓
Unlimited Internet Surfing™ 	✓	✓	✓	✓	✓
Validity	7 Days	7 Days	7 Days	30 Days	30 Days

Driving device quality in base fast but smart...

- Internet-enabled phones are a key enabler to drive data revenues
- Smartphone prices continue to fall and penetration is expected to increase rapidly
- Stimulate device upgrades through low price device campaigns



Affordable TriNet branded phones from \$30



The presentations today represent four stories of Internet for All in Asia



Profitable transition to data



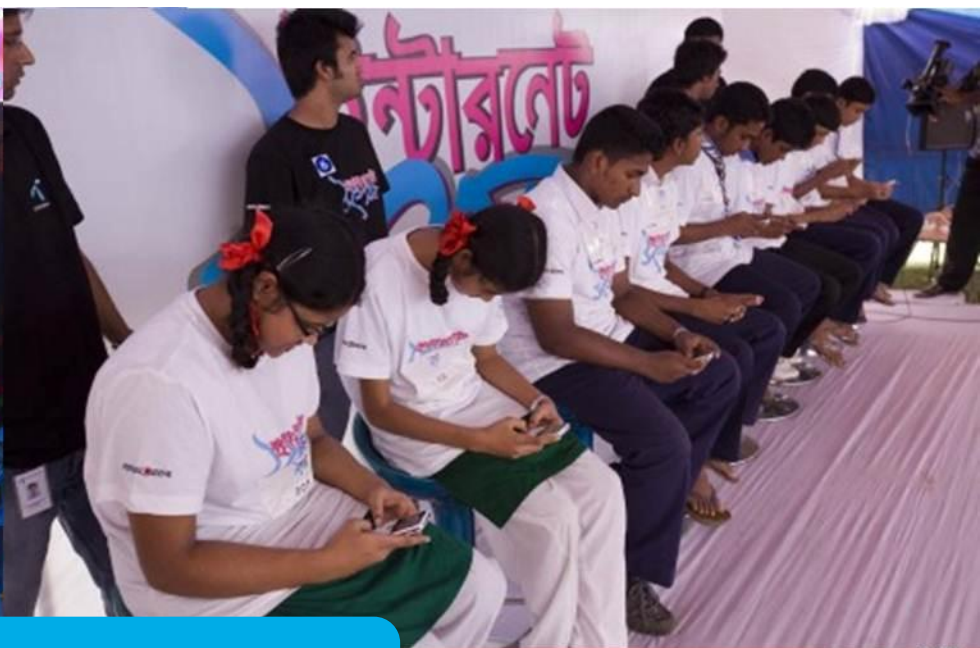
Partnership and device strategy to drive data growth



Overcoming barriers to internet usage in Bangladesh



Enabling basic internet services for the masses in India



Thank you

