



Global Partnerships

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Among the major mobile operators in the world

More than 189 million mobile subscriptions

33 000 employees

Present in markets with 1.3 billion people

A GLANCE AT THE Telenor group

Telenor

Norway

Telenor is the country's leading telecommunications operator.



Telenor

Sweden

Telenor is the third largest mobile operator in Sweden.



Telenor

Denmark

Telenor is the second largest mobile operator in Denmark.



Telenor

Hungary

Telenor is the second largest mobile operator in Hungary.



Telenor

Serbia

Telenor is the largest mobile operator in Serbia.



Telenor

Montenegro

Telenor is the largest mobile operator in Montenegro.



Telenor

Bulgaria

Telenor is the second largest operator in Bulgaria.



DIGI

Malaysia

DIGI is the third largest mobile operator in Malaysia. DIGI is listed on Bursa Malaysia.



Telenor

Pakistan

Telenor is the second largest mobile operator in Pakistan.

Uninor

India

Uninor launched its services in December. Uninor has operations in seven circles.



Grameenphone

Bangladesh

Grameenphone is the largest mobile operator in Bangladesh. Grameenphone is listed on the Dhaka Stock Exchange (DSE) Ltd and the Chittagong Stock Exchange (CSE) Ltd.



Telenor

Myanmar

Telenor has an ambition to become market leader.



dtac

Thailand

dtac is the second largest mobile operator in Thailand and is listed on the Stock Exchange of Thailand and the Singapore Exchange.

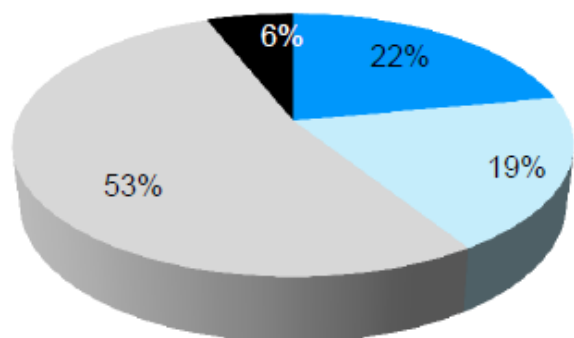


The Telenor Group is listed on the Oslo Stock Exchange.

A voting stake of 43 per cent (economic stake 33 per cent) in VimpelCom Ltd. with 218 mill. mobile subscriptions in 14 markets

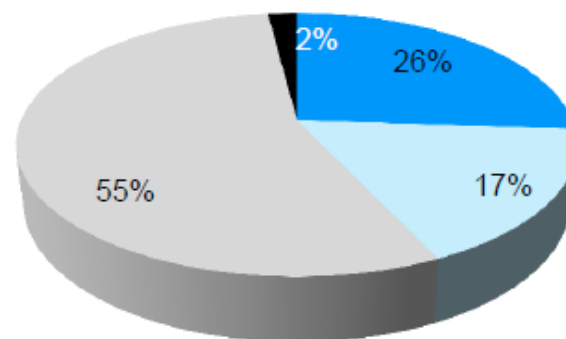
Geographic split of key financials in 1H 2015

Revenues



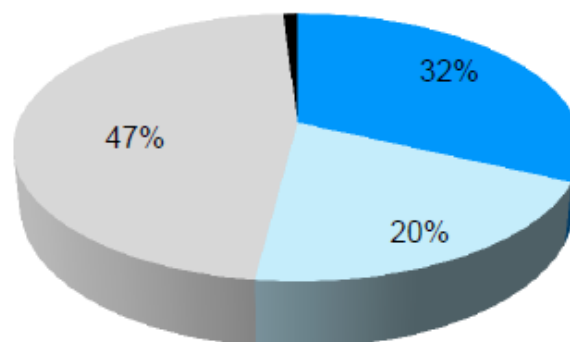
■ Norway ■ Europe ■ Asia ■ Other

EBITDA

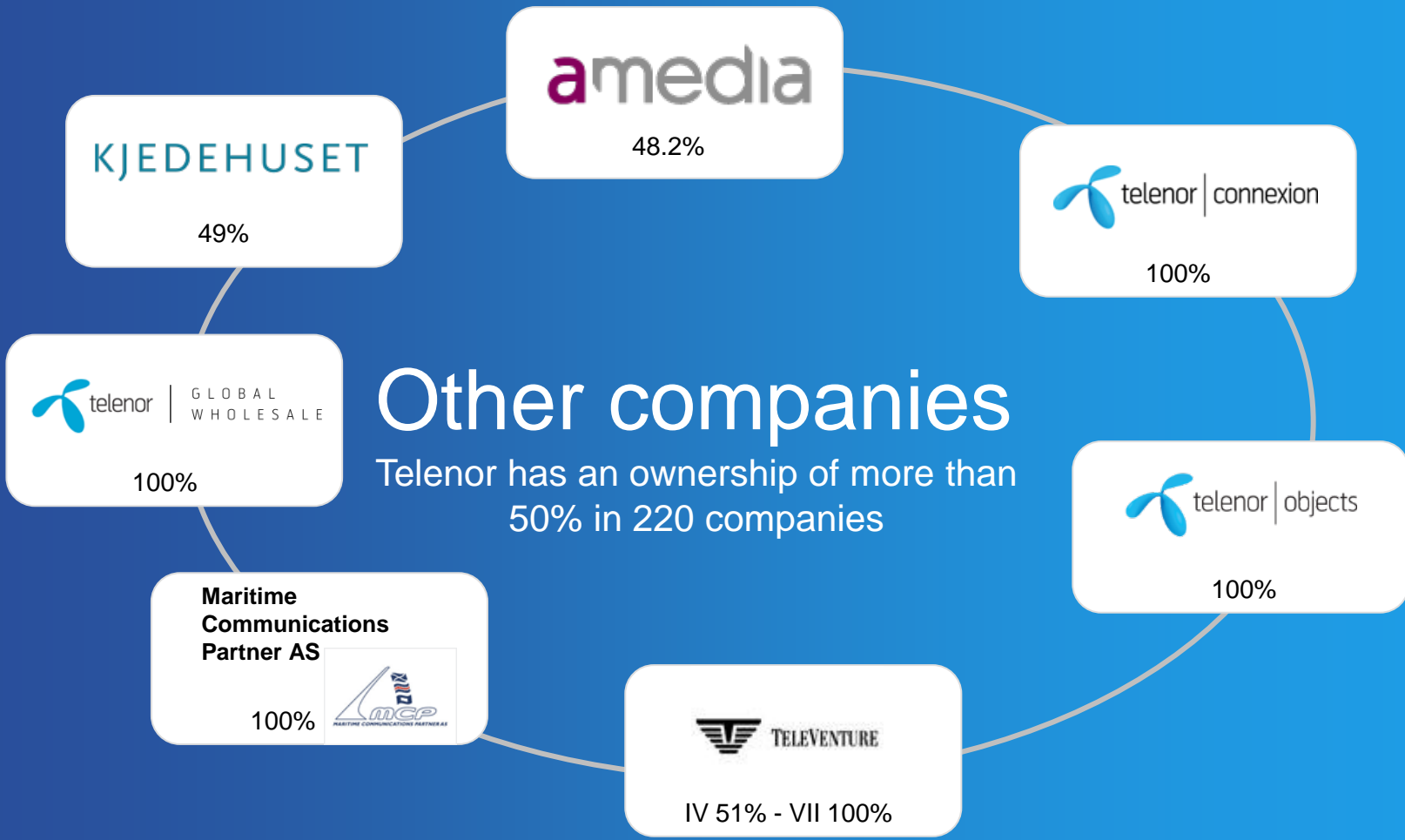


■ Norway ■ Europe ■ Asia ■ Other

Operating cash flow



■ Norway ■ Europe ■ Asia ■ Other



Percentage = Telenor ownership as of Q1 2015

Q2 2015

Creating value by executing on strategy

Internet for All



Loved by customers



Efficient operations









Global Partnerships

- Overall strategic rationale

Leverage **group scale and efficiency** to create attractive global partnerships **differentiating BU's**, propose a **“reason to use”** and **creating new revenues**

Partnerships to enable, stimulate and monetize Internet user growth

Rationale	Objectives	Types of partners	Examples
 <p>Enable</p>	<ul style="list-style-type: none"> • Overcome language barrier • Overcome illiteracy rate • Deliver “Smart” feature phone experience 	<ul style="list-style-type: none"> • Photo, video, push-to-talk • Local/regional content • Stimulate development and support of clients for feature phone 	
 <p>Stimulate</p>	<ul style="list-style-type: none"> • Provide services “everyone” knows • Enable low data consumption services • Provide “always-on” services 	<ul style="list-style-type: none"> • OTT communication • Social networking services • Information services 	
 <p>Monetize</p>	<ul style="list-style-type: none"> • Drive data consumption • Drive acquisition • Drive up-sell • Drive loyalty • Drive service revenues 	<ul style="list-style-type: none"> • Streaming media • Local media • Apps • Games 	

All partnerships should target access to data and partners’ real estate

Example list

ECOSYSTEM

facebook

Google

Tencent 腾讯

Microsoft

SAMSUNG

Alibaba Group
阿里巴巴集团



OTHERS

twitter

Spotify



LINE

NETFLIX

KKBOX

WeChat

PROSPECT

New partners need to meet a set of criteria

New partner criteria:

1. Global reach / global ambitions
2. Best in class
3. Executes on several strategic areas in Telenor Group / BUs
4. Business development and continuous relationship with partner leveraging on Telenor assets
5. Partnership requires leveraging of group scale & Telenor partnership manager

Thank you!

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