



# Telecommunication as a driver of modern digital society: challenges and opportunities

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Among the major mobile operators in the world  
192 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



Respecting all stakeholders in running business: from employees to end customers.

**Telenor** is the first and largest mobile phone operator in Montenegro.

Established in 1996, from 2004 fully owned by Telenor.

Telenor Montenegro's signal covers 99.5% inhabited territory and 94% of land area.



## State of the art technical building.

A secure house for a reliable network

More secure network

Finished in record time

Long-term dedication to Montenegrin market



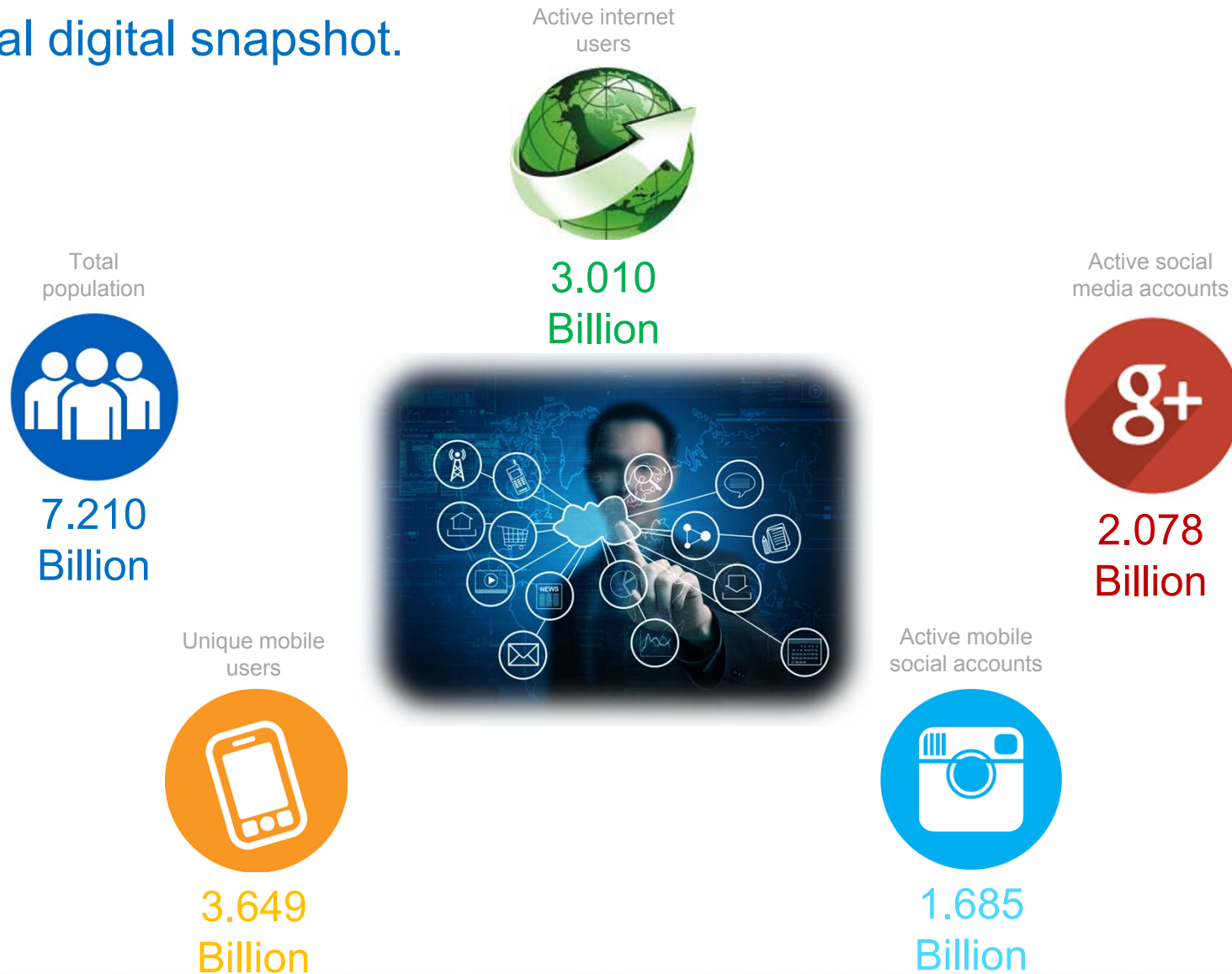
**Telenor Data Center can become the biggest interconnection point in Montenegro and neighbor countries.**



# The world is digital.



# Global digital snapshot.



Europe is in the game.



Total population



**837 million**

Urbanization  
**72%**

Active Internet users



**584 million**

Penetration  
**70%**

Active social media accounts



**387 million**

Penetration  
**46%**

Mobile users



**1.104 million**

vs. Population  
**132%**



# Telecommunication Drives the Modern Society Forward!



Telco is the backbone and key enabler for a modern society and digital economy

The full potential of the digital economy has to be released

Mobility adds value to the traditional services, seen from the consumers perspective





# Telco needs modern regulation, and a level playing field!

## Mobile Network Operators (MNO)



- Critical infrastructure providers
- Big local investors
- Heavily regulated
- Among the biggest tax payers
- Leading employers

## Over The Top Service Providers (OTT)



- No local investments
- Not regulated
- No tax contributions
- No local job creation



An active dialogue between the Government and telco sector is crucial and needed.

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Issues

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- Since 2009, telco face consistent revenue decline
- The tax burden for operators has increased significantly
- Financial erosion of the entire sector reduces investments
- We need predictability, consistency and transparency

Regulation that stimulates growth

Tax policy that respects the contribution of the sector

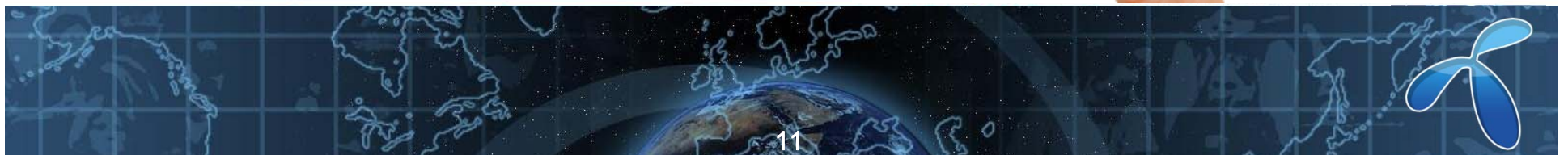
Spectrum licensing that enables infrastructure growth

Efficient allocation of spectrum to support modern technologies



## We want partnership for growth!

- Build a regulatory framework that supports digital economy and stimulates business environment growth!
- See telecommunication infrastructure investments as the key for future economic growth!
- We need full government and regulator support to embrace opportunities and to bring digital society to life!



“We need smart regulation for **smart industry**”

- **Günther H. Oettinger**  
*EU Commissioner for Digital Economy & Society*

**Thank you!**

