



A view from Telenor in Brussels

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Agenda

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The EU and Brussels in context

- Telenor in Brussels – what we do

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The main headlines in Brussels

- The 2020 strategy and the Digital Agenda for Europe
- The Digital Single Market
- A connected continent

3

Our priorities and some concluding remarks

Brussels and the EU in context

The biggest marketplace for policy making and influencing next to Washington DC

EU early with deregulation of telecoms markets, considered an authoritative competence in global arena for ICT policies and trade

EU sets the framework conditions for our business in the EU and beyond

- Source of main political initiatives
- Affecting all our European markets inc. CEE, Asia and Norway

Brussels - an important stakeholder arena

- EU also an Important ally in many markets



Brussels – an important arena for Telenor

Monitor EU
policies

Build networks

Advocate
positions

Assist in
implementation



The Digital Agenda – a Europe 2020 Flagship



Seven Flagship initiatives of which one is the Digital Agenda for Europe

Economic and social benefits from a digital single market based on *fast and ultra fast internet*

Its about digitisation of the entire society

Main initiatives – more than 130 actions

1) *Digital Single Market*, 2) *Interoperability & Standards*, 3) *Security*, 4) *Very fast Internet*, 5) *Research & Innovation*, 6) *Enhancing e-skills*, 7) *ICT for social challenges*

The targets for “very fast” internet remain key milestones

The Digital Single Market



The vision of creating a free flow of online services and entertainment across national borders - a single market for digital goods

Objectives

- to promote take up of e-commerce
- to establish a single area for online payments,
- to further protect EU consumers in the online environment
- to achieve 4% GDP gain in 2020

Important initiatives:

IPR and collective rights management

E-signature directive

Data Protection Regulation

Payment services

VAT reform to align tax rates

Converged audiovisual world

A number of the essential initiatives are still pending

European telecoms markets in perspective

High degree of fragmentation
Structural imbalances



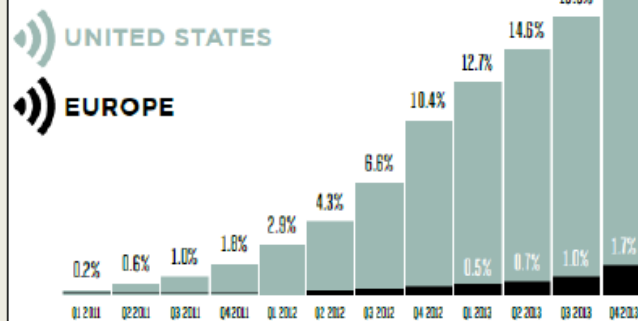
Weaker investor expectation
Insufficient investments



WIRELESS CAPEX IN EUROPE VERSUS THE U.S.
Index 2007 = 100



LTE CONNECTIONS AS PERCENTAGE OF TOTAL
2011-2013 PROJ., EU VERSUS U.S.



Source: GSMA Wireless Intelligence

Revenues of network operators by region⁽¹⁾



▶ European telco's revenue growth is 7 to 9 times lower than in Asia and North America

Source: Thomson Reuters, World Bank, Arthur D. Little analysis

The Connected Continent Package



The Connected Continent proposal aims at completing the single market to bring Europe back in the lead

Initiatives falls in following areas:

- single authorisation
- full harmonisation of consumer rights including net neutrality
- strengthen harmonisation of spectrum
- European fixed access product
- roaming and intra EU calls
 - + a Recommendation
 - + a Communication

24 – 25 October 2013

- Heads of State meeting dedicated to the Digital Agenda and innovation
- The Council conclusions about the Connected Continent package were not convincing

Telenor Brussels policy agenda 2014 →

Pursuing a framework conducive to investments where the increasing convergence of actors in the value chain is acknowledged by legislators

Priorities

- Single market regulation
- Payment services
- Data protection regulation
- Review of relevant market recommendation
- *Market access and trade dialogue w/Asia*
- *Enlargement*

Implementation issues

- Roaming regulation
- Sector specific taxes
- eCall
- Safer internet for kids

In pipeline

- Copyright, content liability
- Network security
- Data Retention
- Human rights
- AV media regulation

Concluding remarks

The Digital Agenda Strategy for Europe remains the focal point of reference – politically and regulatory for the foreseeable future

Telenor shares the objective of the EU agenda on a wide range of policy issues

The financial crisis has slow down momentum of decisions makers, “Europe is behind”

Many policy initiatives are being discussed – are they the right ones?



Thank you

