

**IT'S TIME  
TO OPEN UP**

**Welkom | Welcome | Välkommen**

# AGENDA

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**09.00 – 09.05** Being a Challenger, Allison Kirkby

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**09.05 – 09.10** The Set-up, Jeff Dodds

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**09.10 – 09.25** The Network, Francois Mairey

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**09.25 – 09.50** The Deal, Jeff Dodds

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**09.50 – 10.20** Questions?

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# BEING A CHALLENGER

Allison Kirkby | President and CEO

**SHAKING  
THINGS UP  
SINCE 1993**



**TELE2**



**WHY DO WE  
CHALLENGE?**

**BECAUSE  
WE CAN!**

# THE SET-UP

Jeff Dodds | CEO Tele2 Netherlands

**FIXED**

**MOBILE**

**B2B**



**MOBILE**

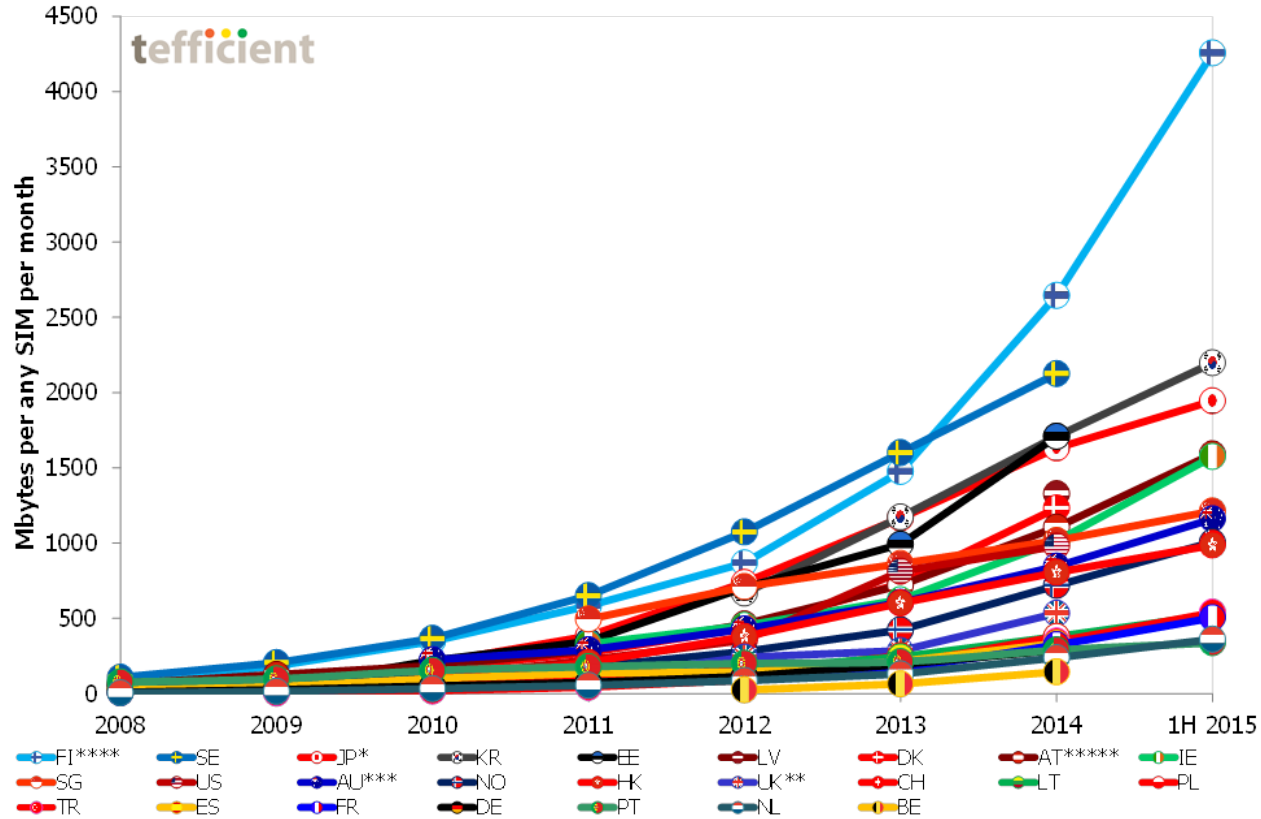


**THE BEST  
OF THE  
BEST...**



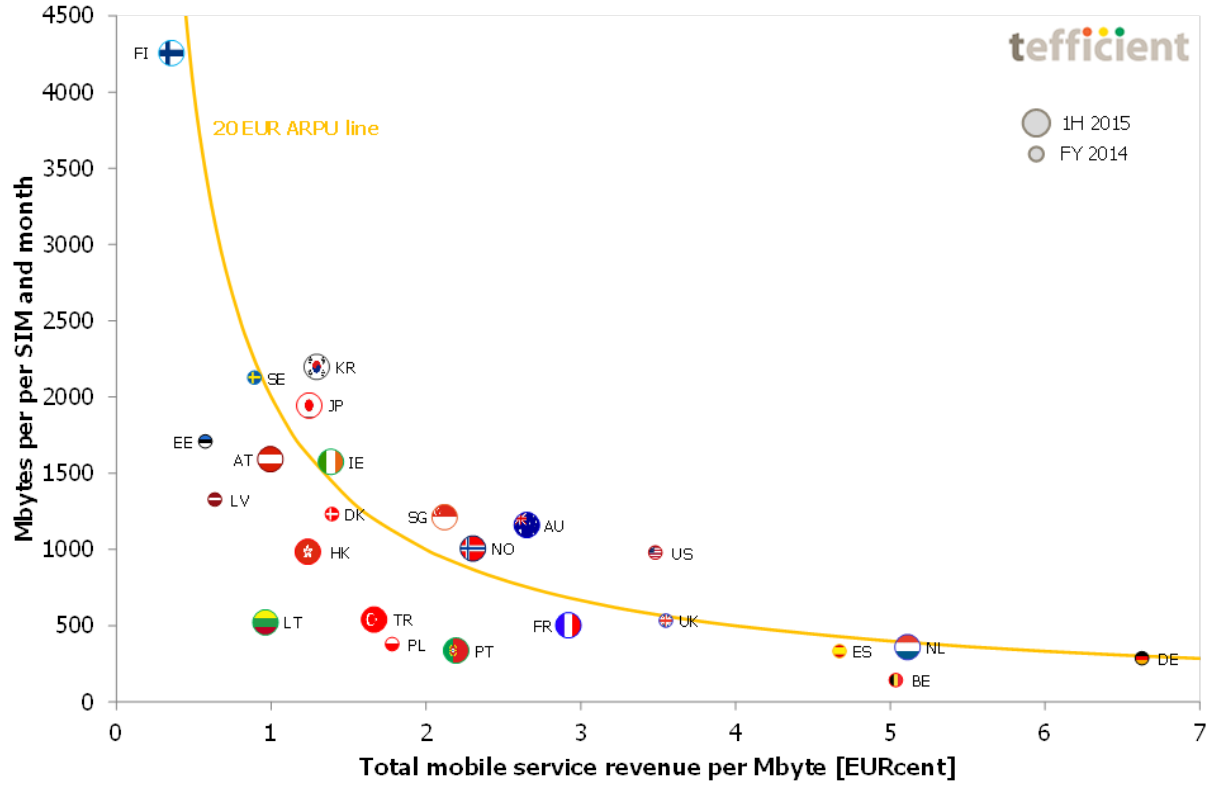
**TELE2**

# BUT...



Source: T-Efficient: Competitor business update – H1 2015

# WHY?





A close-up photograph of a person's hands on a car's steering wheel and gear shift. The person is wearing a blue t-shirt and blue jeans. The car's interior is visible, including the beige leather seats and the center console. The text 'TELE2 IS ON A MISSION' is overlaid on the image in large, bold, sans-serif font. 'TELE2' is white, and 'IS ON A MISSION' is orange.

**TELE2**  
**IS ON A**  
**MISSION**

TELE2

**GREAT COVERAGE**

**IS ON A  
MISSION**

TEL2

**GREAT COVERAGE**

**GREAT SPEED**

**EVERYONE ON**



**GREAT COVERAGE**

**GREAT SPEED**

**THE LOWEST PRICE**

**WHEN?**

**12TH OF**  
**NOVEMBER**  
**2015**

# THE NETWORK

Francois Mairey | CTIO Tele2 Netherlands

# OUR 4G NETWORK

Population coverage outdoor

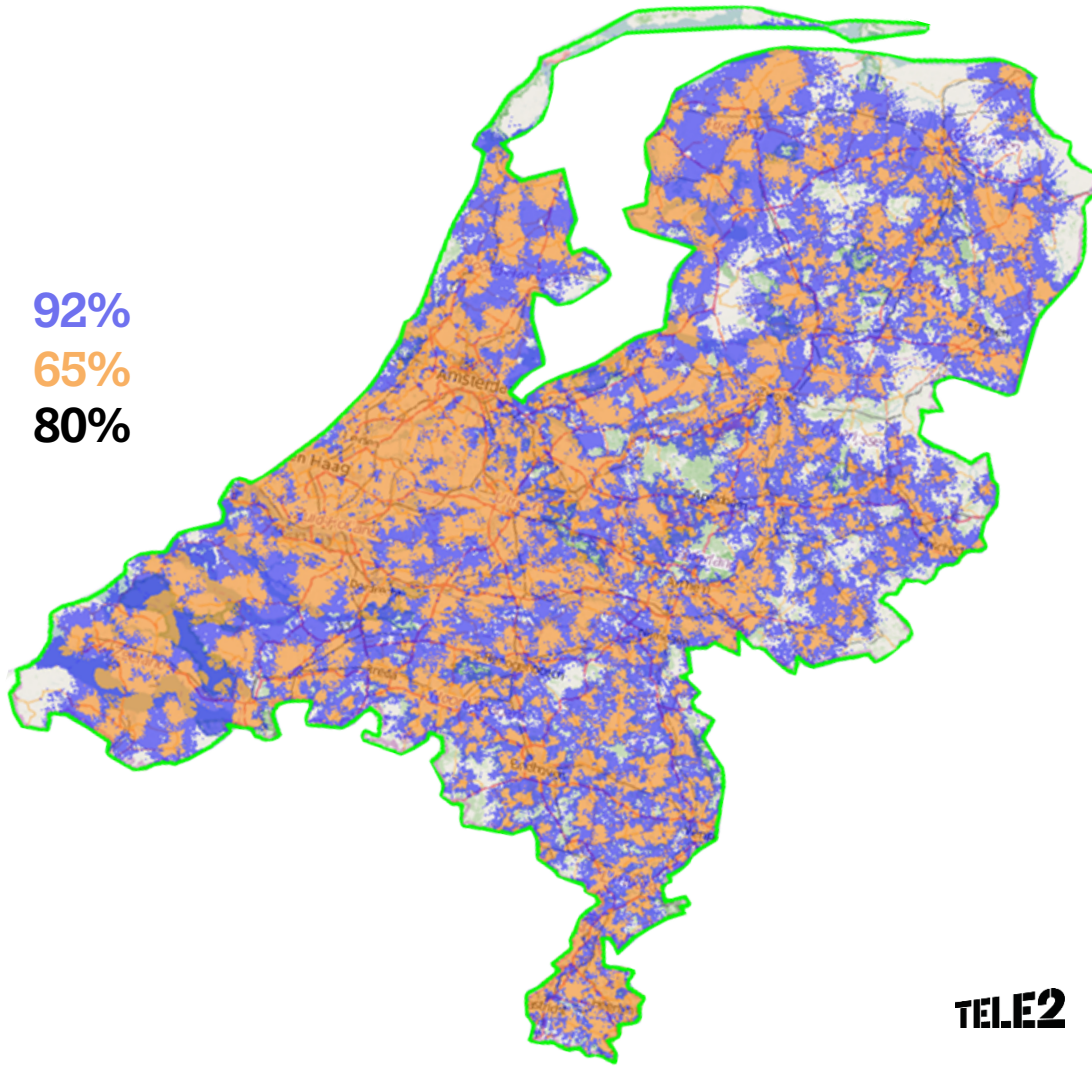
Population coverage indoor

Geographical coverage

92%

65%

80%





# OUR 4G NETWORK

Population coverage outdoor

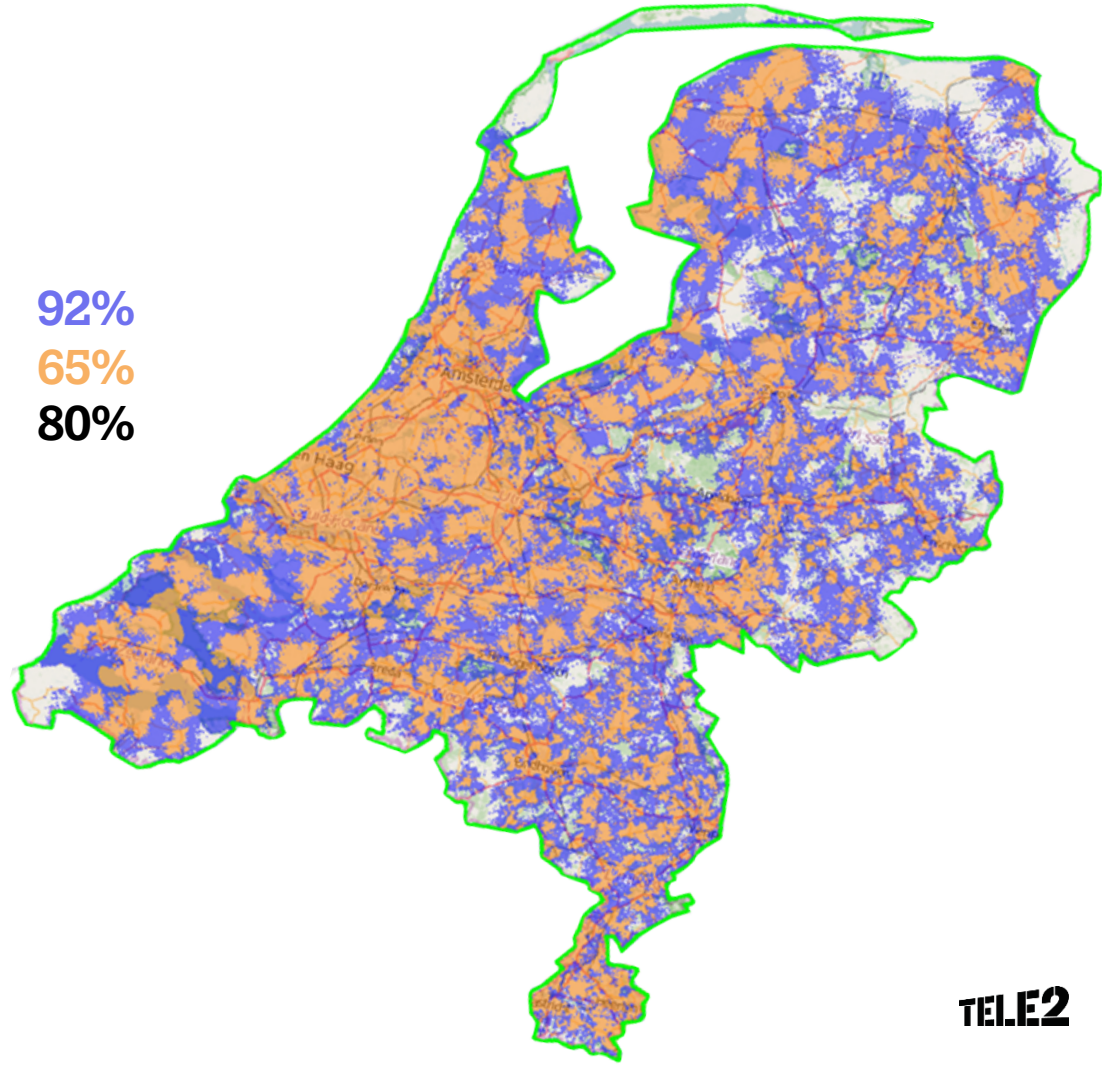
Population coverage indoor

Geographical coverage

92%

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80%



- Transferred learnings from one of the best in the world

# OUR 4G NETWORK

Population coverage outdoor

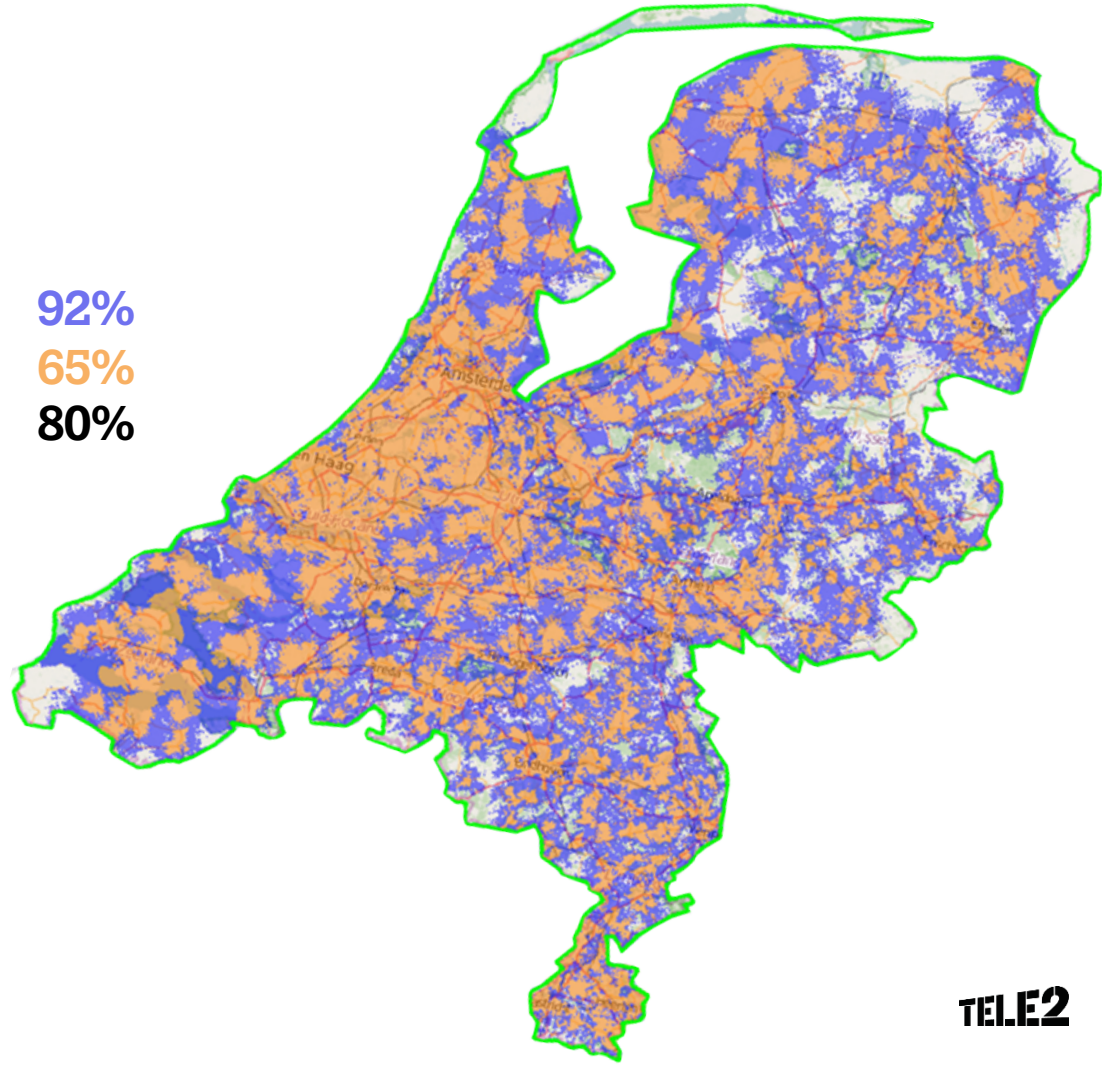
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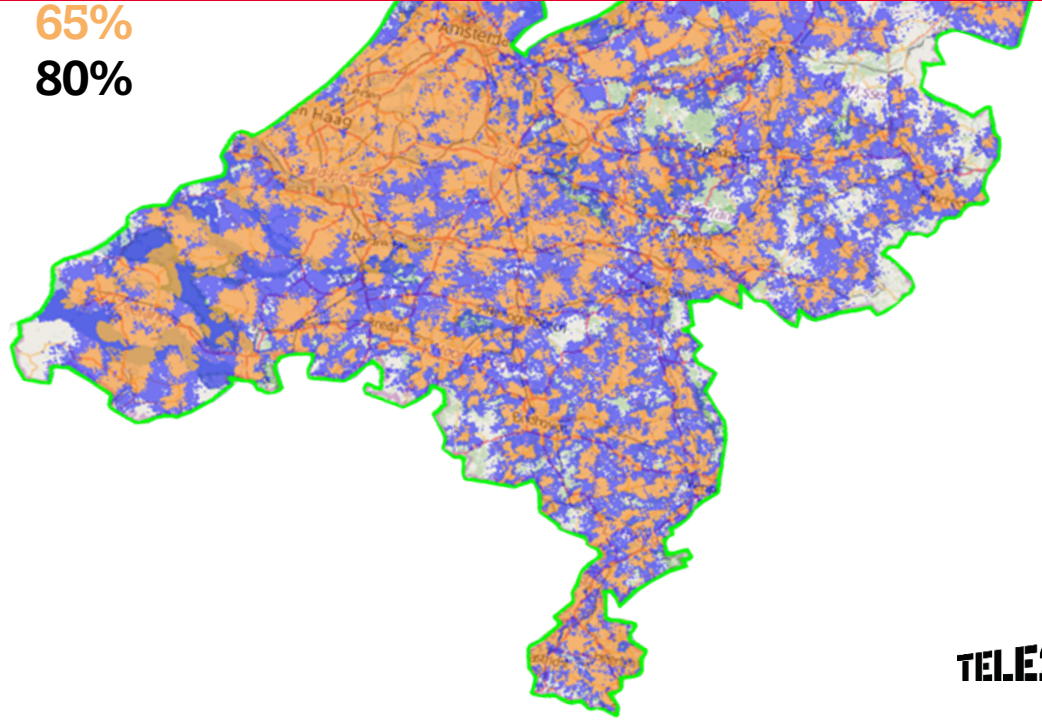
- Transferred learnings from one of the best in the world
- Nationwide 4G population coverage Q1 2016

# HIGH SPEED

**Population coverage indoor**  
**Geographical coverage**

**65%**  
**80%**

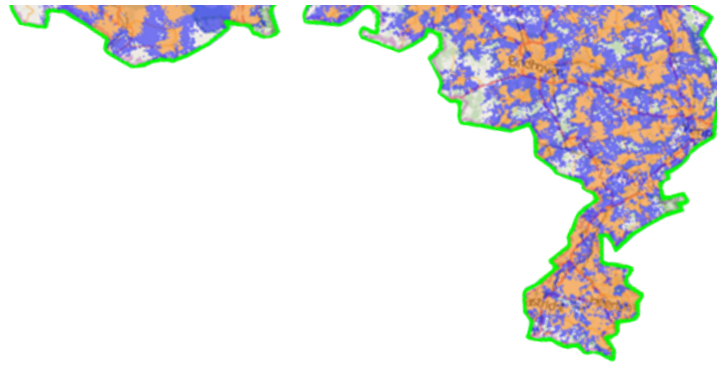
- Transferred learnings from one of the best in the world
- Nationwide 4G population coverage Q1 2016



# HIGH SPEED

# HIGH CAPACITY

- Transferred learnings from one of the best in the world
- Nationwide 4G population coverage Q1 2016



**HIGH SPEED**

**HIGH CAPACITY**

**LOW LATENCY**

**LTE  
ADVANCED**

**VOLTE**

**TELE2**

# LTE ADVANCED

- Speeds up to 225 Mb/Sec
- Efficient spectrum usage
- LTE-A features to come

# VOLTE

# LTE ADVANCED

- Speeds up to 225 Mb/Sec
- Efficient spectrum usage
- LTE-A features to come

- Very short call set-up time
- Save battery
- HD voice & noise reduction

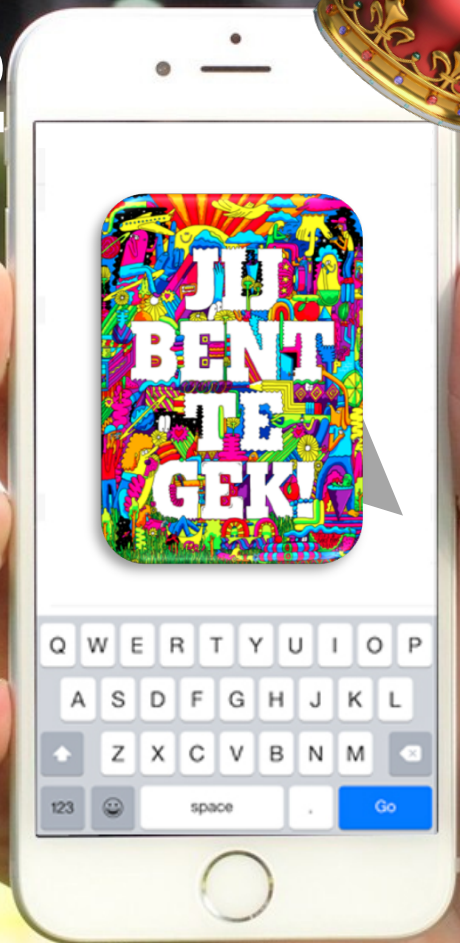
# VOLTE



# THE DEAL

Jeff Dodds | CEO Tele2 Netherlands

# EXISTING CUSTOMER IS KING

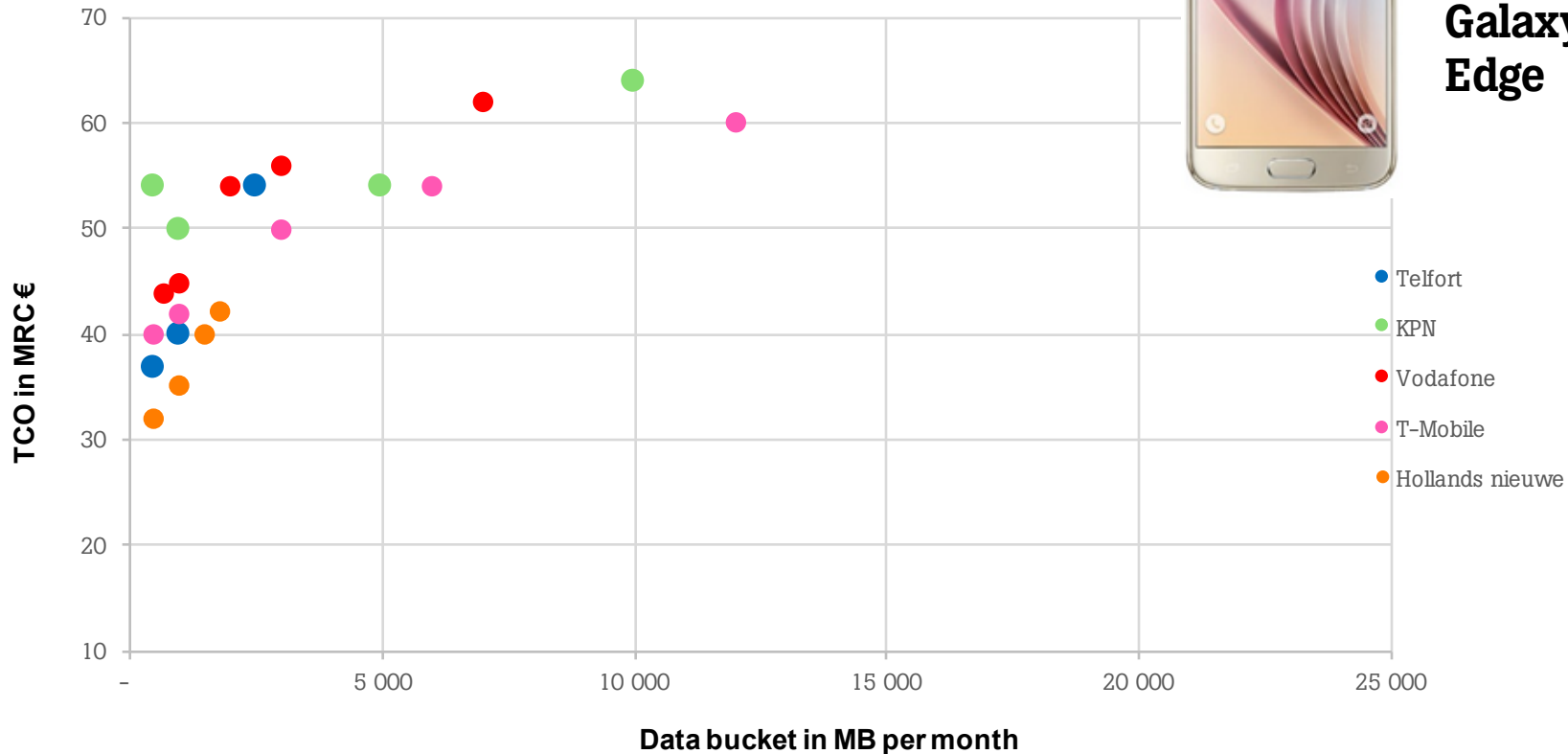


# **GOING TO WAR** **ON DATA**

# GOING TO WAR ON DATA



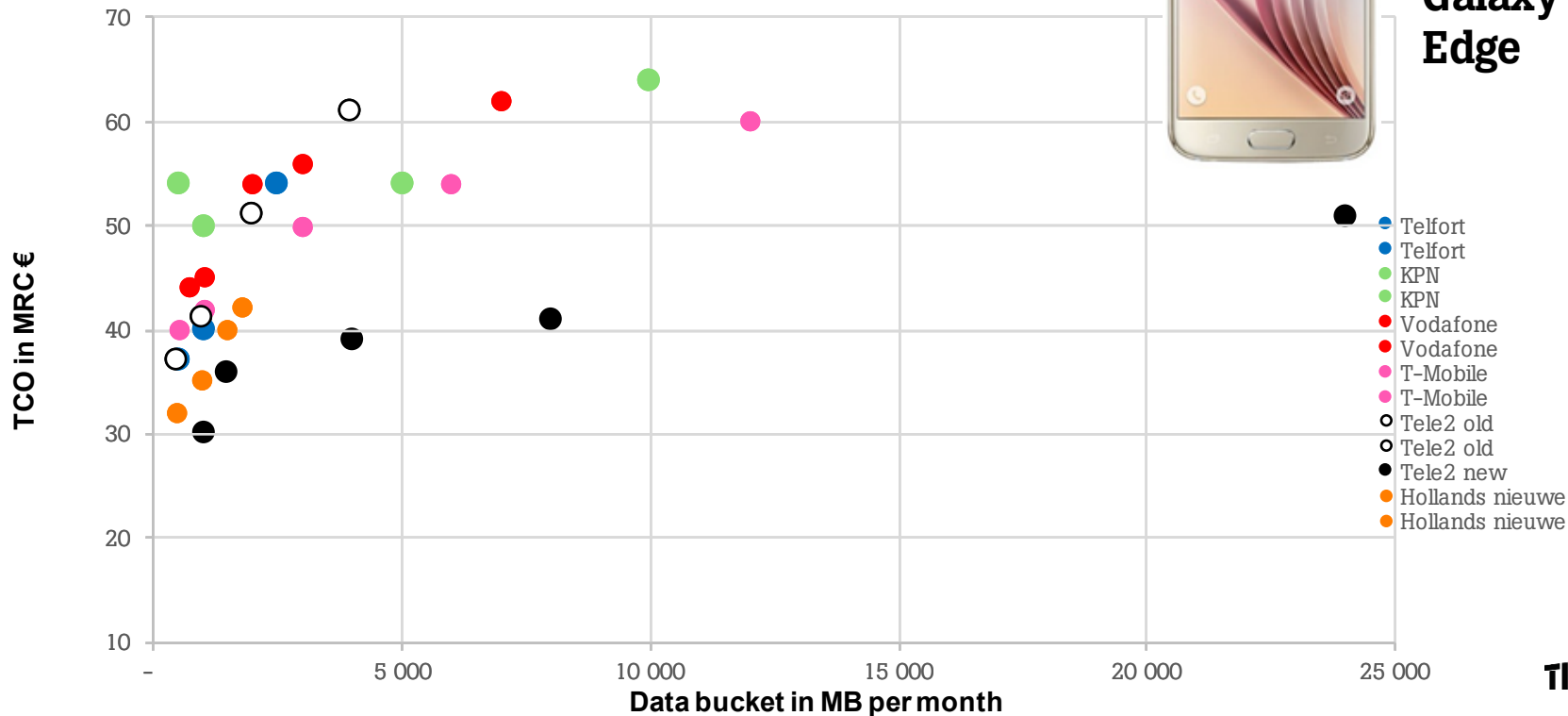
Subscription  
+  
Samsung  
Galaxy S6  
Edge



# GOING TO WAR ON DATA



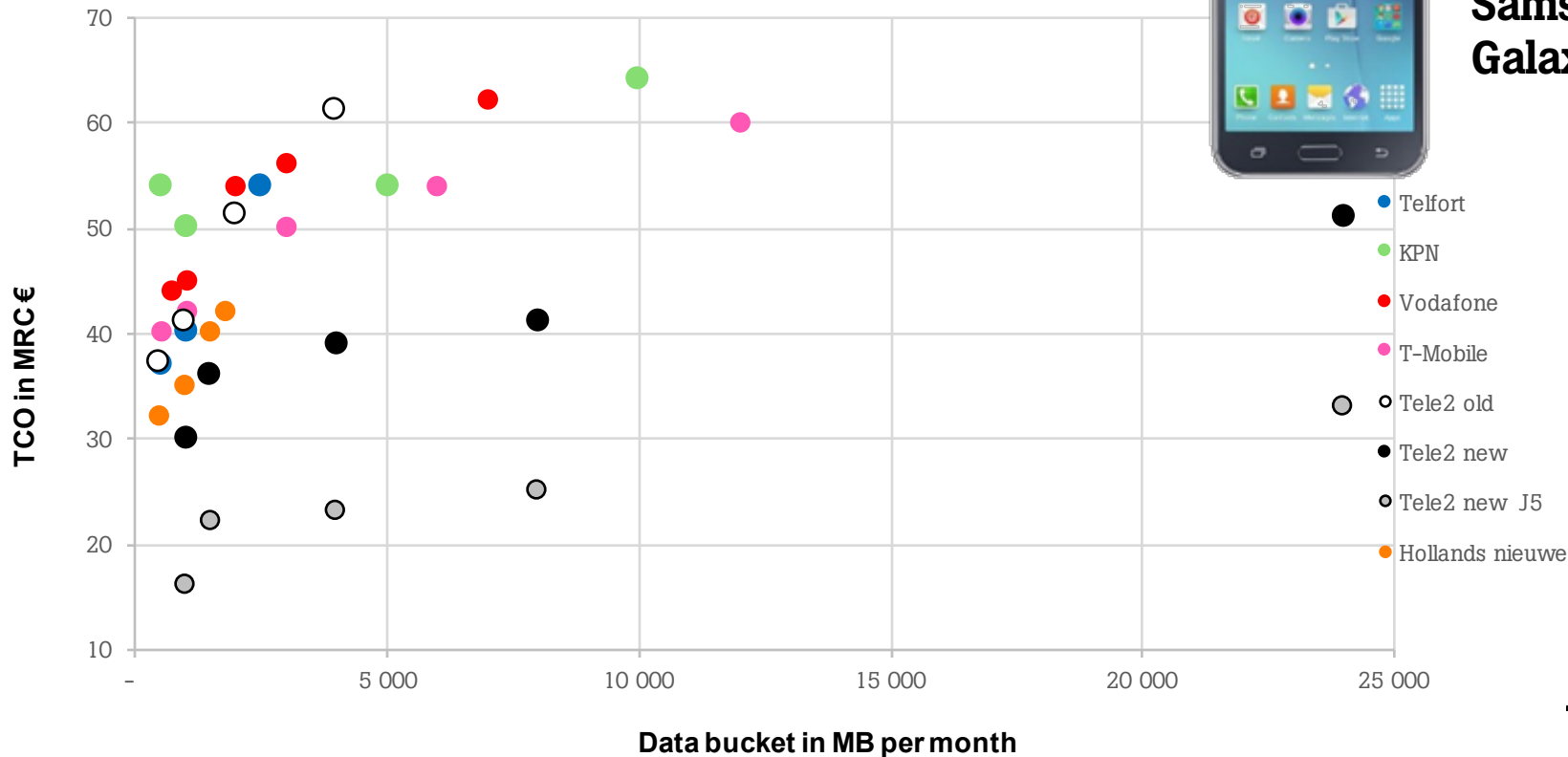
Subscription  
+  
Samsung  
Galaxy S6  
Edge



# GOING TO WAR ON DATA



**Tele2  
Subscription  
+  
Samsung  
Galaxy J5**



# **DISRUPTIVE PROPOSITION FOR 4G VOLTE HANDSETS**

# DISRUPTIVE PROPOSITION FOR 4G VOLTE HANDSETS

<b>100</b> MIN/SMS <b>1GB</b> <b>€10</b>	<b>UNLIMITED</b> VOICE/SMS <b>1.5GB</b> <b>€16</b>	<b>UNLIMITED</b> VOICE/SMS <b>4GB</b> <b>€21</b>	<b>UNLIMITED</b> VOICE/SMS <b>8GB</b> <b>€25</b>	<b>UNLIMITED</b> VOICE/SMS <b>24GB</b> <b>€35</b>
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# DISRUPTIVE PROPOSITION FOR 4G VOLTE HANDSETS

<b>100</b> MIN/SMS <b>1GB</b> <b>€10</b>	<b>UNLIMITED</b> <b>VOICE/SMS</b> <b>1.5GB</b> <b>€16</b>	<b>UNLIMITED</b> <b>VOICE/SMS</b> <b>4GB</b> <b>€21</b>	<b>UNLIMITED</b> <b>VOICE/SMS</b> <b>8GB</b> <b>€25</b>	<b>UNLIMITED</b> <b>VOICE/SMS</b> <b>24GB</b> <b>€35</b>
<b>+</b>	<b>+</b>	<b>+</b>	<b>+</b>	<b>+</b>
Average discount on handset <b>€0</b>	Average discount on handset <b>€0</b>	Average discount on handset <b>€4</b>	Average discount on handset <b>€6</b>	Average discount on handset <b>€8</b>

# HOW DO WE COMPARE?

## GALAXY S6 + 4GB + UNLIMITED VOICE



- Unlimited voice/sms
- 3GB

**€ 46**

**€ 30 one-off**



- Unlimited voice/sms
- 3GB

**€ 46**

**€ 29.95 one-off**



- Unlimited voice/sms
- 5GB

**€ 54**

**€ 0 one-off**

# HOW DO WE COMPARE?

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**€ 29.95 one-off**



- Unlimited voice/sms
- 5GB

**€ 54**

**€ 0 one-off**



- Unlimited voice/sms
- 4GB

**€ 39**

**€ 0 one-off**

# HOW DO WE COMPARE?

## GALAXY S6 + 4GB + UNLIMITED


15% cheaper than T-Mobile with  
33% more data and €29.95 less upfront




**vodafone**



- Unlimited voice/sms
- 30GB



**T-Mobile**



- Unlimited voice/sms
- 5GB

€ 54

€ 0 one-off



**tele2**



- Unlimited voice/sms
- 4GB

€ 39

€ 0 one-off

# HOW DO WE COMPARE?

## GALAXY J5 + 1GB + 100 MINUTES



- 100 min/sms
- 0.7GB

**€ 23**

**€ 45 one-off**



- 120 min/sms
- 0.5GB

**€ 24.50**

**€ 0 one-off**



- 150 min/sms
- 1GB

**€ 27.50**

**€ 0 one-off**

# HOW DO WE COMPARE?

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- 0.5GB

€ 24.50

€ 0 one-off



- 150 min/sms
- 1GB

€ 27.50

€ 0 one-off

TELE2



- 100 min/sms
- 1GB


€ 15

€ 0 one-off


# HOW DO WE COMPARE?

## GALAXY J5 + 1GB + 100 M

35% cheaper than Vodafone  
with 43% more data and €45 less upfront




**vodafone**



- 100 min/sms
- 0.5 GB

one-off



**T-Mobile**



- 100 min/sms
- 1GB

€ 27.50

€ 0 one-off



**TELE2**



- 100 min/sms
- 1GB

€ 15

€ 0 one-off

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**OR**



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€ 0 one-off



- 150 min/sms
- 1GB

€ 27.50

€ 0 one-off

TELE2



- Unlimited Voice/sms
- 4GB

€ 24

€ 0 one-off

# HOW DO WE COMPARE?

## GALAXY J5 + 1GB + 100 MIN



**vodafone**



- 100 min/sms
- 0.7GB



**T-Mobile**



- 100 min/sms
- 4GB

€ 0 one-off



**tele2**



€ 27.50

€ 0 one-off



**tele2**



- Unlimited Voice/sms
- 4GB

€ 24

€ 0 one-off

For € 0.50 less than T-Mobile you get 8 times more data and unlimited voice/sms

# HOW DO WE COMPARE?

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**OR  
EVEN**

# HOW DO WE COMPARE?

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- 100 min/sms
- 0.7GB

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- 120 min/sms
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**€ 0 one-off**



- 150 min/sms
- 1GB

**€ 27.50**

**€ 0 one-off**



- Unlimited Voice/sms
- 8GB

**€ 28**

**€ 0 one-off**

# HOW DO WE COMPARE?

## GALAXY J5 + 1GB + 100 MIN



**vodafone**



- 100 min/sms
- 0.7GB



**T-Mobile**



- 100 min/sms
- 0.7GB

€ 0 one-off



**KPN**



- 100 min/sms
- 0.7GB

€ 27.50

€ 0 one-off



**Tele2**



- Unlimited Voice/sms
- 8GB

€ 28

€ 0 one-off

For € 0.50 more than KPN you get 8 times more data and unlimited voice/sms

# **COMPETITIVE PROPOSITION** **FOR ALL SIM-ONLY**

# COMPETITIVE PROPOSITION FOR ALL SIM-ONLY

**100**MIN/SMS

**1GB**

**€10**

**150**MIN/SMS

**1.5GB**

**€15**

**250**MIN/SMS

**2.5GB**

**€20**

# HOW DO WE COMPARE?

## 250 MINUTES + 2.5GB



- 300 min + unlimited sms
- 3GB
- 24 months binding

**€ 24**

+ € 15 activation fee



- 300 min + unlimited sms
- 2GB
- 24 months binding

**€ 22.50**

+ € 14.95 activation fee



- 200 min/sms
- 5GB
- 24 months binding

**€ 25**

+ € 20 activation fee



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**€ 22.50**

+ € 14.95 activation fee



- 200 min/sms
- 5GB
- 24 months binding

**€ 25**

+ € 20 activation fee



- 180 min
- 24 months binding

**No 4G offer**

**€ 20**

+ € 10 activation fee



- 300 min/sms
- 3GB
- 24 months binding

**€ 22.50**

+ € 9.95 activation fee



- 200 min/sms
- 2GB
- 12 months binding

**€ 25**

+ € 14.99 activation fee

# HOW DO WE COMPARE?

## 250 MINUTES + 2.5GB



- 300 min + unlimited sms
- 3GB
- 24 months binding

**€ 24**

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T-Mobile

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# TELE2

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- 2.5GB
- 12 months binding

**€ 20**

+

**€ 10**

**activation fee**

hollands  
nieuwe

- 180 min
- 24 months binding

**No 4G  
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**€ 20**

+ € 10 activation fee

Ben

- 300 min/sms
- 3GB
- 24 months binding

**€ 22.50**

+ € 9.95 activation fee

simyo

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TELE2

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**OR**

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**TELE2**

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- 24 months binding

**€ 24.50**

+ € 15 activation fee



- 300 min/sms
- 2GB
- 12 months binding

**€ 25**

+ € 14.99 activation fee



- Unlimited voice/sms
- 4GB
- 24 months binding

**€ 24**

A brand new smartphone, unlimited voice/sms and 50% more data for €1 less than Simyo Sim-Only

# BUILDING OUR BRAND





# TELE2

OMDAT  
OET  
OMDAT  
AN



DROWN YOURSELF  
IN DATA

TELE2



**IK TREK  
HET  
INTERNET  
HELEMAAL  
LEEG**

Met een 24GB databundel  
voor een genadeloos lage prijs

**OMDAT HET KAN**

[Check tele2.nl](http://Check.tele2.nl)

**TELE2**

**IK WIL  
MEER  
SELFIES  
POSTEN  
DAN KIM  
KARDASHIAN**

Met het nieuwste 4G-netwerk  
voor een genadeloos lage prijs

**OMDAT HET KAN**

[Check tele2.nl](http://Check.tele2.nl)

**TELE2**

**IK WIL  
STREAMEN  
TOT IK  
SCHEEL  
ZIE**

Met het nieuwste 4G-netwerk  
voor een genadeloos lage prijs

**OMDAT HET KAN**

[Check tele2.nl](http://Check.tele2.nl)

**TELE2**

**TELE2**



• TELE2 PRESENTS •  
**OMDAT HET KAN**

# SUMMARY

We're a challenger and are here to shake things up

# SUMMARY

We're a challenger and are here to shake things up

# SUMMARY

We're releasing the handbrake

We're a challenger and are here to shake things up

# SUMMARY

handbrake

Our 4G network already has 92% outdoor population coverage

challenger and are here to shake things up

# SUMMARY

Nationwide coverage by the end of Q1 2016

handbrake

work already has 92% outdoor population coverage

Nationwide coverage by the end of Q1 2016

challenger and are here to sh

# SUMMARY

work already has 92% outdoor population c

LTE-advanced network with potential speeds up to 225Mb/sec

s up

ake

Nationwide coverage by the end of Q1 2016

challen

are here to sh

Voice over LTE planned for launch in Q1 2016

work already

LTE-advanced network with potential speeds up to 225Mb/sec

s up

SUMMARY

ake

outdoor population c



The data-revolution starts tomorrow

Voice over LTE planned for launch in Q1 2016

Network with potential speeds up to 225Mb/sec

Nationwide coverage by the end of Q1 2016

SUMMARY

challen

re he

s up

work already

outdoor population co

ake



# GAME ON

The data-revolution starts here

Voice over LTE

Nationwide coverage

challenges

potential speeds up to 225Mb/sec

reach in Q1 2016

outdoor population coverage

work already

Q1 2016

**QUESTIONS?**