

Sanjiv Ahuja

welcome to Orange



welkom
willkommen
bienvenido
vitejte
bienvenue
benvenuto
kalos
dzień dobry

Witaj



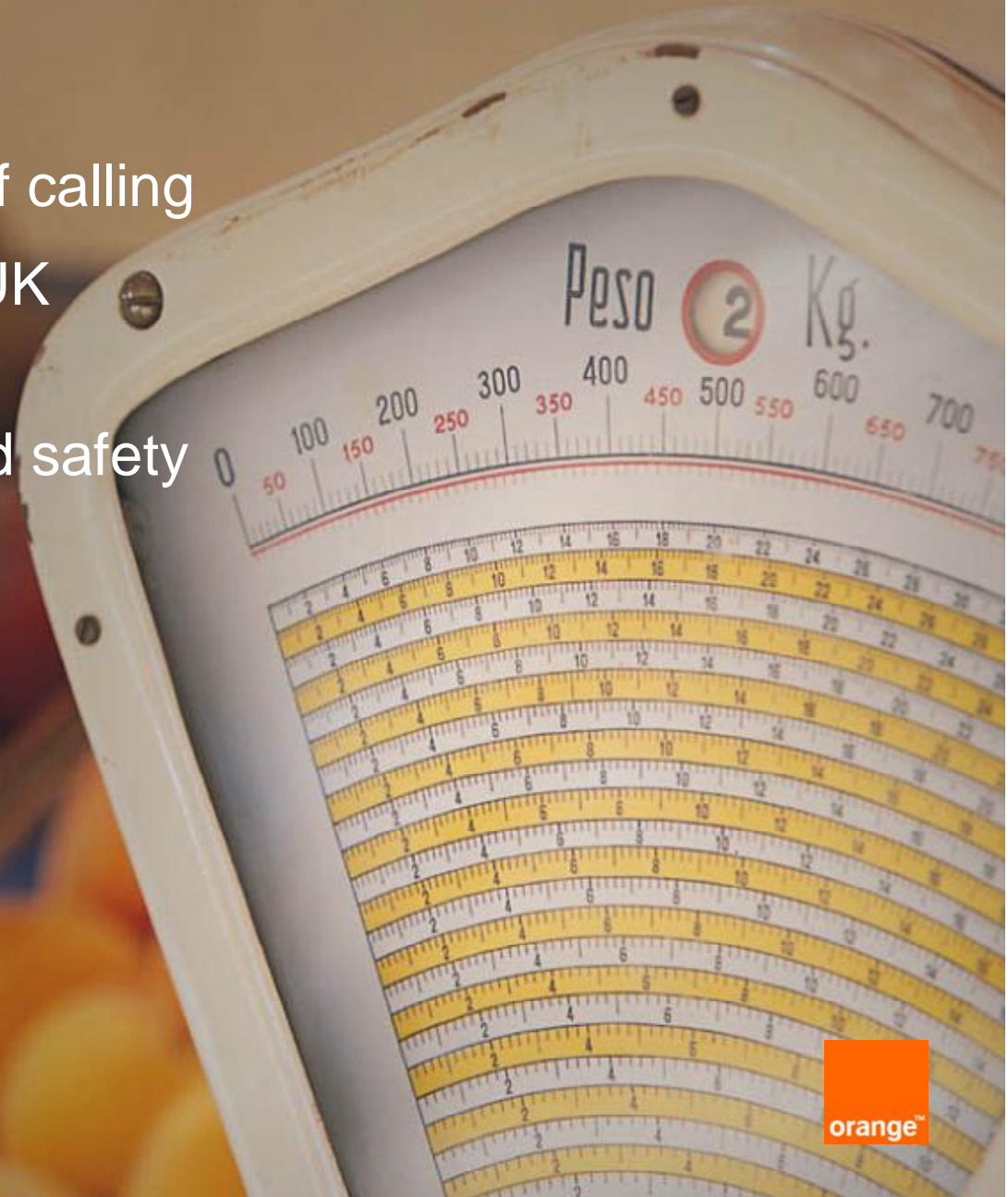
our values

- n honest
- n straightforward
- n refreshing
- n dynamic
- n friendly



honest

- n clarity about the cost of calling
- n per-second billing for UK customers
- n free guidebook on child safety distributed last month



straightforward

- n keeping things simple
- n signature phones exclusive to Orange
- n available in Poland from Monday
- n making it easier for customers to get more from their mobiles
- n customers spend 1/3 more time using mobile internet services
- n and 1/3 more likely to use services like photo messaging
- n over 2 million sold last year



refreshing

- n we are different from other operators
- n **first** to offer live mobile TV services in France, Belgium, Romania, UK
- n **first** to offer full track music download
- n French customers can access 11 live radio channels, video and ring tones
- n helping business customers to work more efficiently and effectively
- n customer support



dynamic

- n because our customers' need change
- n offering new services like Live TV, Talk Now "Push-To-Talk"
- n new price and tariff packages
 - n Orangeclick



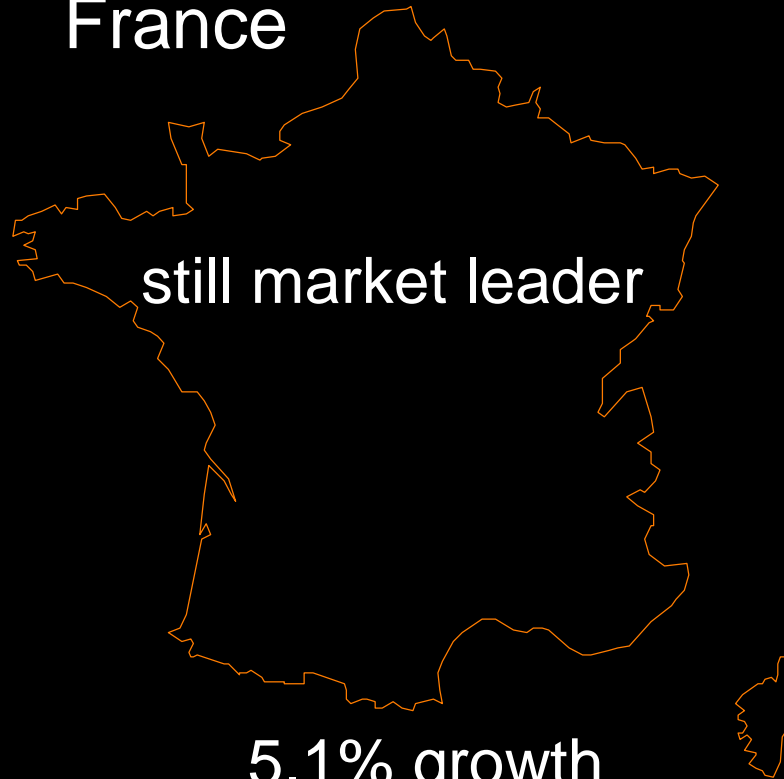
friendly

- n helping customers get the most from their mobiles
- n Orange phone trainers
- n the human touch



the Orange effect

France



still market leader

5.1% growth
in customer base

UK



5.2% growth
in customer base

Source: H1 2005 results



the Orange effect

Romania



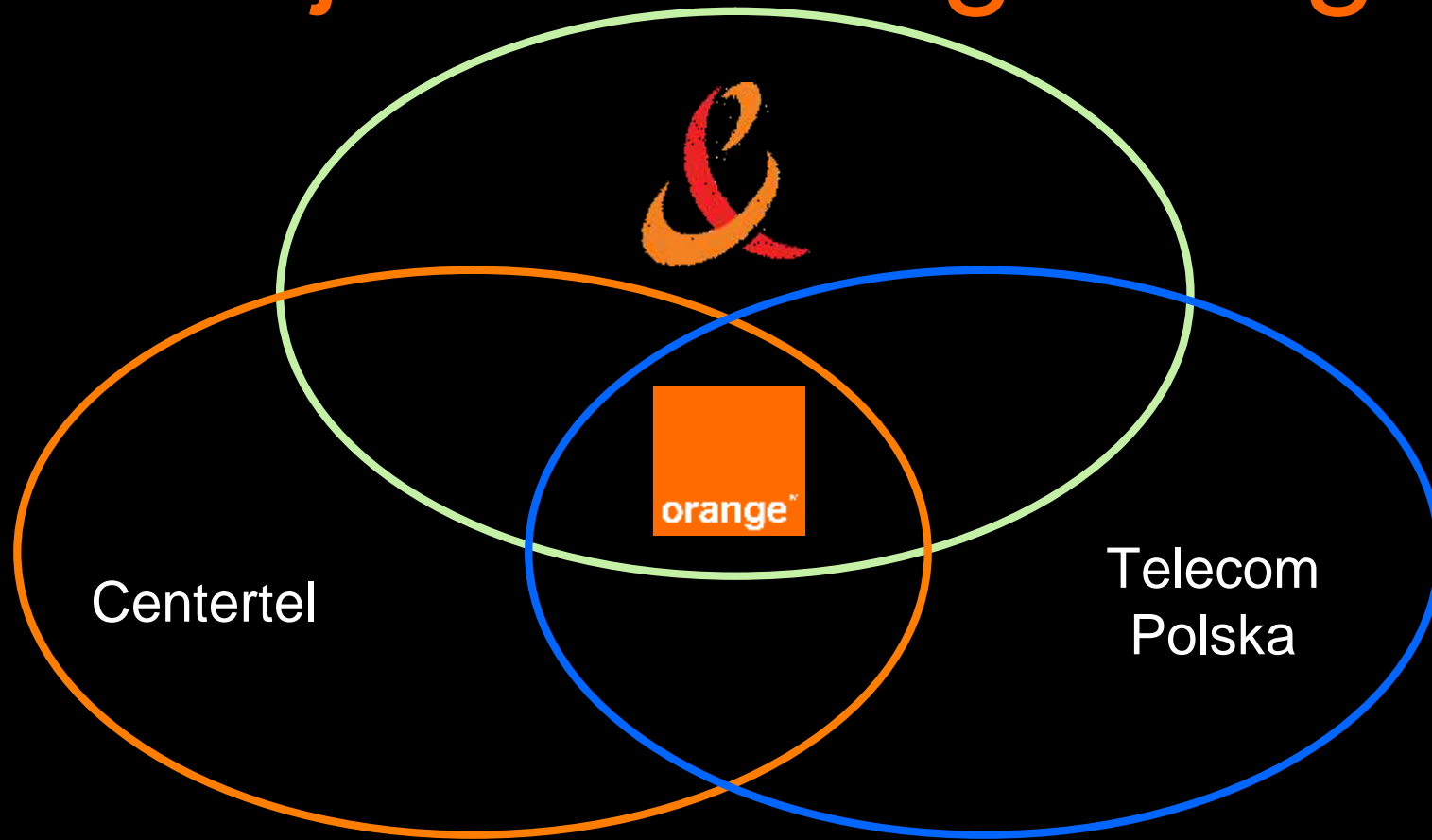
2003

- n 38% growth in customer base
- n market Number One choice
- n halved rate of staff turnover
- n 31% revenue growth

2004

- n 44.6% growth in customer base
- n almost 45% revenue growth

this is just the beginning



n together we will provide our customers with world-class next generation services





the future's bright, the future's Orange