Discussion on Technology and legal system

- FTTH and IPTV in Japan and France -

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financial key figures (at 12/31/2008)

- 53.5 billion euros in consolidated revenues
- 19.4 billion euros gross operating margin (GOM)
- 186,000 employees worldwide
- 36.3% GOM/revenues
- 4.1 billion euros net income attributable to shareholders
- 1.40 euro per share* dividend

* to be proposed to the Shareholders' Meeting on 26 May 2009.
The Orange Labs are located on 4 continents, close to innovative ecosystems, to benefit from local skills, and be close to new markets.
### Key Figures (as of 12/31/2008)

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Percentage Change</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Million customers worldwide</td>
<td>182</td>
<td></td>
<td></td>
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<tr>
<td>Million mobile customers</td>
<td>122</td>
<td></td>
<td></td>
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<tr>
<td>Growth in ADSL broadband customers</td>
<td>+ 9%</td>
<td></td>
<td></td>
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<tr>
<td>Growth in Business Everywhere customers worldwide</td>
<td>+ 46%</td>
<td></td>
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<tr>
<td>Million ADSL broadband customers in Europe</td>
<td>12.7</td>
<td>+ 70%</td>
<td></td>
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<tr>
<td>Growth in mobile broadband customers</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Million mobile broadband customers</td>
<td></td>
<td></td>
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<tr>
<td>+ 66% growth in IPTV customers</td>
<td></td>
<td></td>
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<tr>
<td>Million VoIP customers</td>
<td>6.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Million IPTV customers in Europe</td>
<td>2.1</td>
<td></td>
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<tr>
<td>+ 36% growth in VoIP customers</td>
<td></td>
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Track record of achievements (1)

- **1960’s**
  - **electronic voice circuit switching:** France has the world most modern network
  - **first TV transmission by radio** (with England)

- **1978**
  - **data packet switching:** Transpac becomes the leading provider to corporates

- **1981**
  - **Teletel:** France opens a **new era of online data services**

- **1982**
  - **launch of the GSM**

- **1997**
  - **ADSL:** paving the way for leading Europe in **triple play penetration**
  - **launch of Mobile prepaid cards** (Mobicarte)

- **2000**
  - **first wap services**
  - **first 3G tests**
  - **One of the first IPv6 offer** in the world

- **2001**
  - **first mass market location-based services in Europe**
  - **Introduction of giga ethernet** in Spain

- **2003**
  - **live TV and VoD on ADSL:** first complete offer on the French market

- **2004**
  - **Business Everywhere:** first convergent offer to corporates
Track record of achievements (2)

2006
- HDTV on ADSL: first offer worldwide
- Natural dialogue on ISV (interactive Voice Services)
- Connected hospital at home

2007
- Livephone HD Voice
- 160 GHz transmission on 1 lambda

2008
- Opening of APIs: SMS, e-mail, click2call, contacts, messages, photos, authentication, Device capability enabler, location, multimedia conference,…
- Solar energy feeders for Africa mobile network
- Internet services in TGV (France)
- Flashcodes – interactive advertising
- Catch up TV on 3 screens (France)
- 3D TV (France)
Interesting differences between France and Japan

In France, “Orange TV” over ADSL provided by France Telecom is subscribed by 2.1 million people. “Any time”, “any place”, and “any screen (TV, PC, mobile)” are achieved by fixed/mobile/broadcasting convergence.

In Japan broadband network infrastructure like FTTH (Fiber To The Home) has been actively introduced. 15.9 million people are enjoying FTTH in Japan as of June 2009. IPTV in Japan started in 2003. However the subscribers are still below 0.5 million.

Distance between social scientist and the market/users should be reduced.
thank you