



World Class Communications

Fotis Karonis, Managing Director IT & Mobile, BT



Performance – Revenue £25bn (€28bn)

- £19bn Revenue +6% 2015/16
- £6.5bn EBITDA +5% 2015/16
- Strong growth in IP products
 - IP Lines up 62%
 - BT Cloud Voice users up 29% and BT Cloud phone users up 34% in Q4
- EE Performance
 - £6,311m Revenue
 - £1,781m EBITDA Full year 2015
 - 16m LTE customers
 - 31.5m connections

Well over £1bn of gross opportunities + improved synergy expectations



>£1bn

gross opportunities over the next two years



+10% (from c.£360m to c.£400m)

cost synergy expectations

EE Network Leadership

- Over 16 Million LTE Subscribers
- 98.6% of the UK population covered
- 92% geographic coverage by end 2017
- 3 Carrier (LTE-A) network for Cat 9 devices across the network
 - 20MHz 1800MHz spectrum plus 35MHz of 2600MHz
 - 4x4 MIMO opportunity
- VoLTE & VoWiFi fully deployed
- Emergency service network launch 2017



OUR 4G NETWORK
is 50% faster than any other



79% faster than O₂

75% faster than Three

50% faster than Vodafone

"EE's 4G network is 50% faster than Vodafone and more than 70% faster than O2 and Three. EE gives you the best network experience for downloading videos, music and content, whenever you want it."



iPhone 7 – best execution in Europe
Pixel phone by Google- exclusive to EE in UK



Innovative 4G coverage in rural areas... first global user cases



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Innovative services



September 2016 - Football fans can experience Premier League football match between Chelsea and Arsenal live in Virtual Reality in EE stores.

The game was filmed using Virtual Reality (VR) cameras and broadcast to deliver immersive viewing experiences, so fans can choose from four different viewpoints.



Decaf / Déca

☐

Shots / Shots

☐

Syrup / Sirop

☐

Robert

IT'S TIME
TO GET
PERSONAL

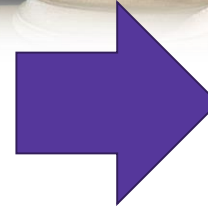
The New Normal

Rise of the new consumer, driven by knowledge & demand

- Empowerment, with a sense of purpose
- Self-serve

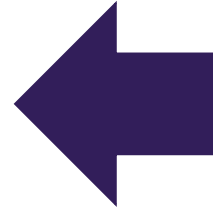
Always on networked society

- Using mobile and apps to instantly connect to each other
- Provide instant requests and feedback to companies – social first



New communication provider

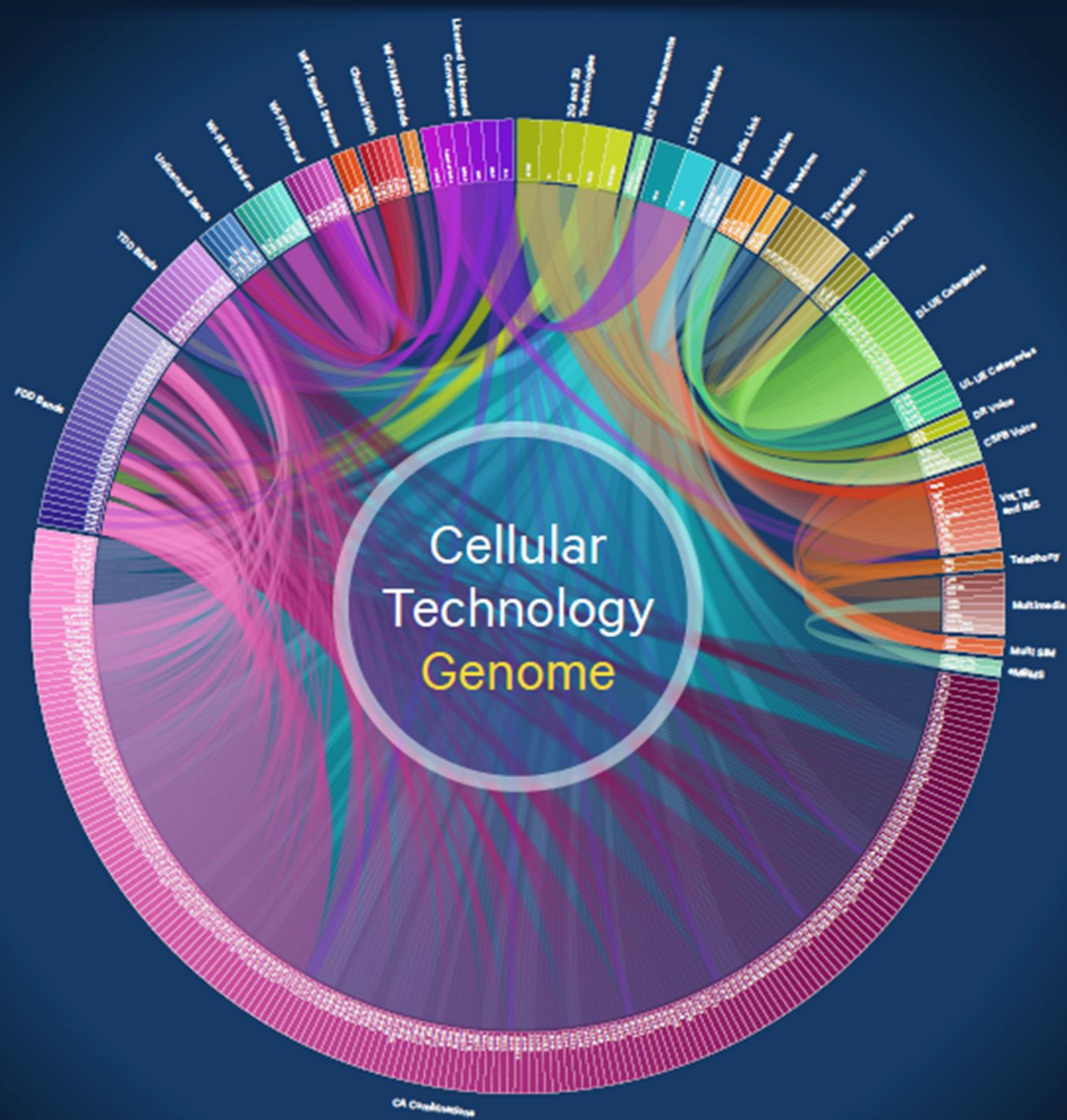
- Everything connected, all the time, without fail
- Cloud first
- Automation and personalisation



Telecoms Ecosystem Innovation

- Web Internet
- Smartphone & Apps
- Superfast connectivity – 4G+
- Wireless first – Mobile, WiFi

Challenging Complexity



Network innovation

1st Generation



2nd Generation



3rd Generation



4th Generation



5th Generation



The 5th Generation is not an incremental step



Delivers real
value to the
world







Ευχαριστώ Αθήνα