



# Telenors deltagelse i EU- forskningen

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# A global provider of telecommunications services

14 countries  
174 million mobile subscribers  
More than 40 000 employees



- Mobile operations in 13 markets across the Nordic region, Central Eastern Europe and in Asia
- One of the world's largest mobile operators with 174 mill. mobile subscribers \*
- A leading Nordic position in mobile, broadband and TV services

- Total workforce of more than 40 000
- Headquartered in Norway
- Listed on the Oslo Stock Exchange
- Revenues 2009: NOK 107 billion\*
- Market cap: NOK 134 billion \*\*

\* all companies Kyivstar included as per Q4 2009

\*\* As of 30 December 2009

# Industry changes will create continued opportunities for growth

## Our industry has changed...

- From monopoly to market competition
- From national to global players
- From telecom to data technology
- High growth

Yesterday

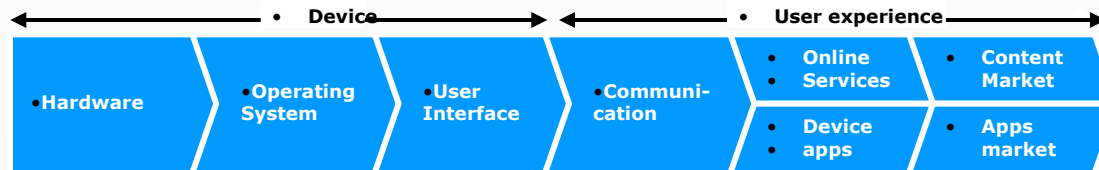
Today

Tomorrow

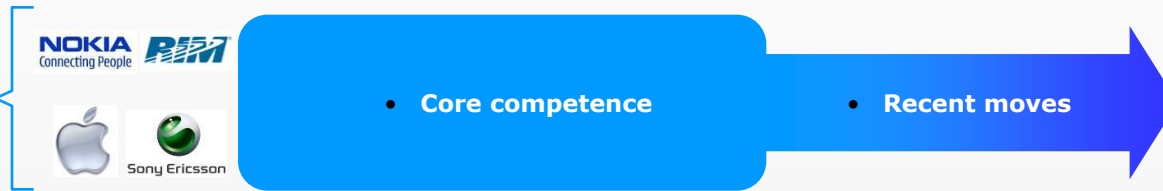
## ...and the change will continue at high speed

- Growth flattening
- Increased competition
- Continued technological development with explosion in mobile data traffic
- Stronger focus on partnerships and the enabler role
- Software based services
- Customer power will grow
- Communities and social networks

# New competitive dynamics and interdependencies



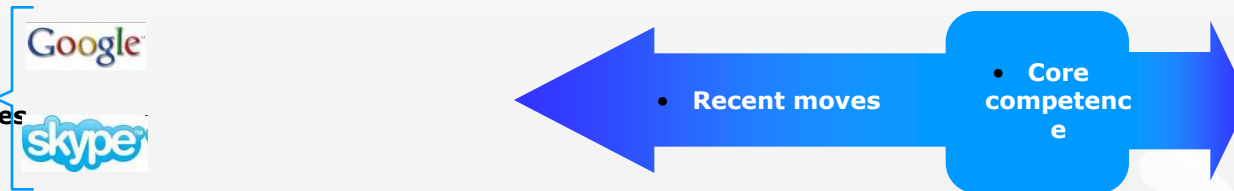
## • Device vendors



## • Example: Apple App store



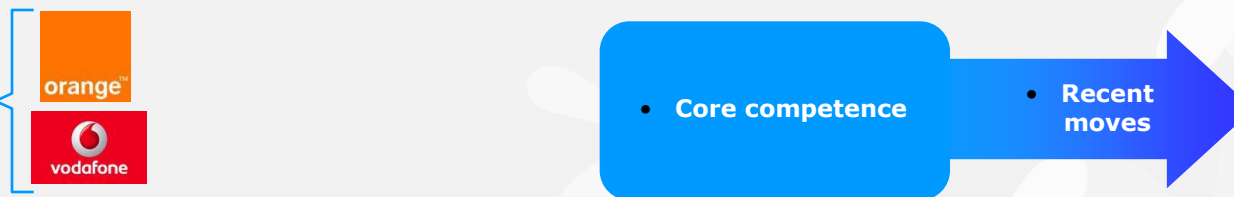
## • Internet companies



## • Example: Google Android



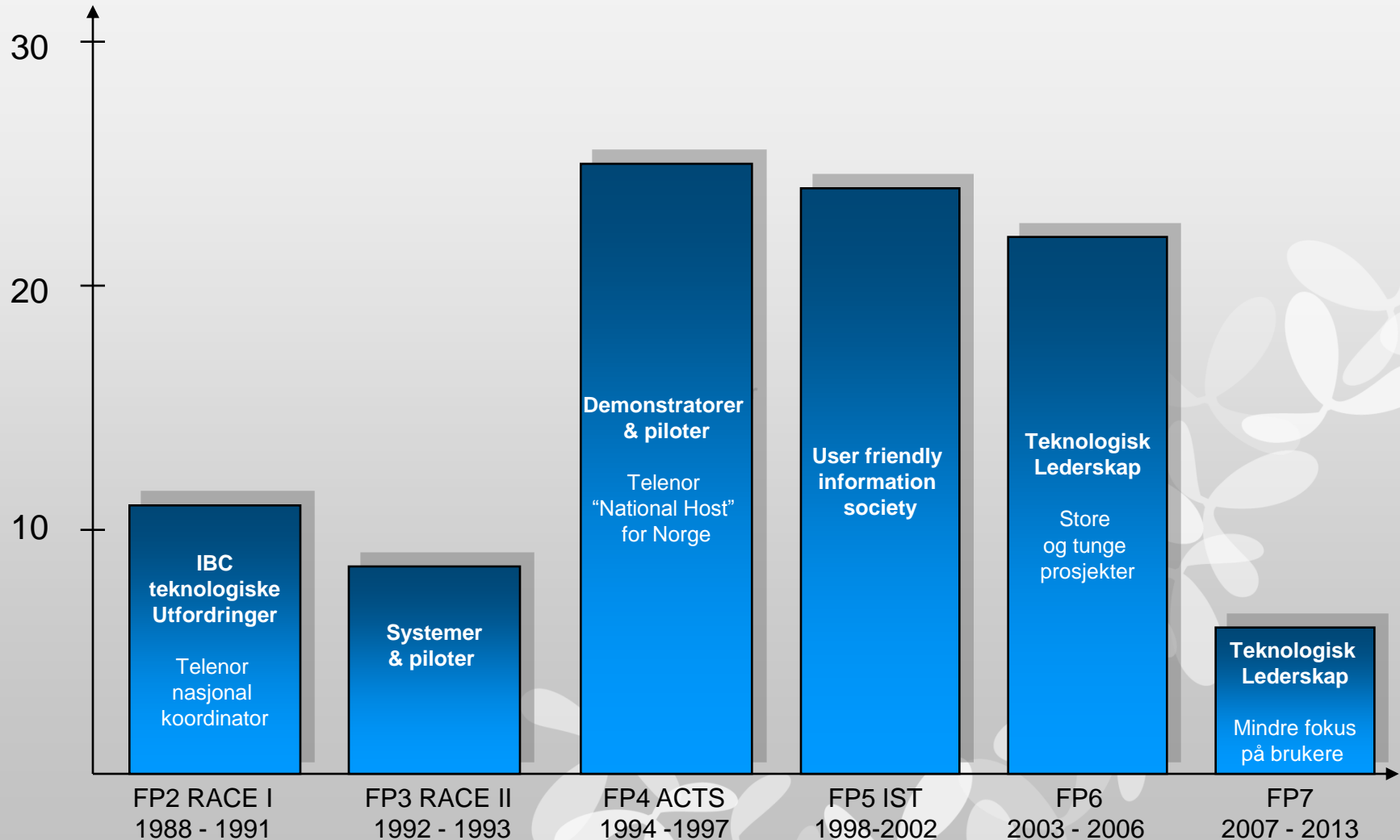
## • Mobile operators



## • Example: Orange App shop



# Telenors deltagelse i EU-FP's – ICT del



# Hovederfaringer fra deltagelse i FP6 og FP7 – ICT del

## **Positive**

- “Communication, computing and software technologies” god match
- Høy suksessrate på søknader innen dette området
- Videreføring av gode faglige samarbeidsnettverk
- Positive erfaringer med å gå inn som leder av arbeidspakker
- Kompetanseoppbygging av yngre forskere

# Hovederfaringer fra deltagelse i FP6 og FP7 – ICT del

## Utfordringer

- ICT programmene i EU oppleves til dels teknologitunge
  - “tradisjonelle” i forholdet mellom teknologi og innovasjon
  - “moderne” i fokus på ny teknologi
- Mye rettet inn mot å serve de tradisjonelle teknologitunge miljøene i Europa
  - Kan forsinke omstilling
- Teknologiforskning viktig for leverandører, operatører anskaffer ferdige systemer i større grad en før
- Bruker- og tjenesteinnovasjon har liten plass i programmene
- Fokus på “basic research” mindre relevant for teleoperatører
- Lang tid fra planlegging til resultater
  
- Betydningen av å delta i prosjektets tidlige definisjonsfase for å påvirke faglig innhold
- Koordinatorrollen mindre interessant

Thank you!

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