



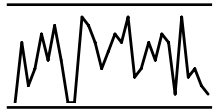
Introducción

Las tres olas Tecnologicas en Telefonía

Access Technology

Core Network Technology

**Traditional
Fixed
Telephony**

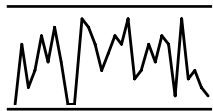


Analog

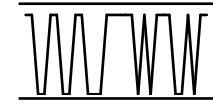


Analog

NMT

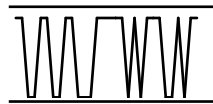


Analog

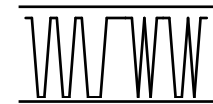


Digital

GSM

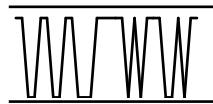


Digital



Digital

**GSM
Intranet
Office**



Digital



**Packet
Switching**

**Future
Wireless
Comms**

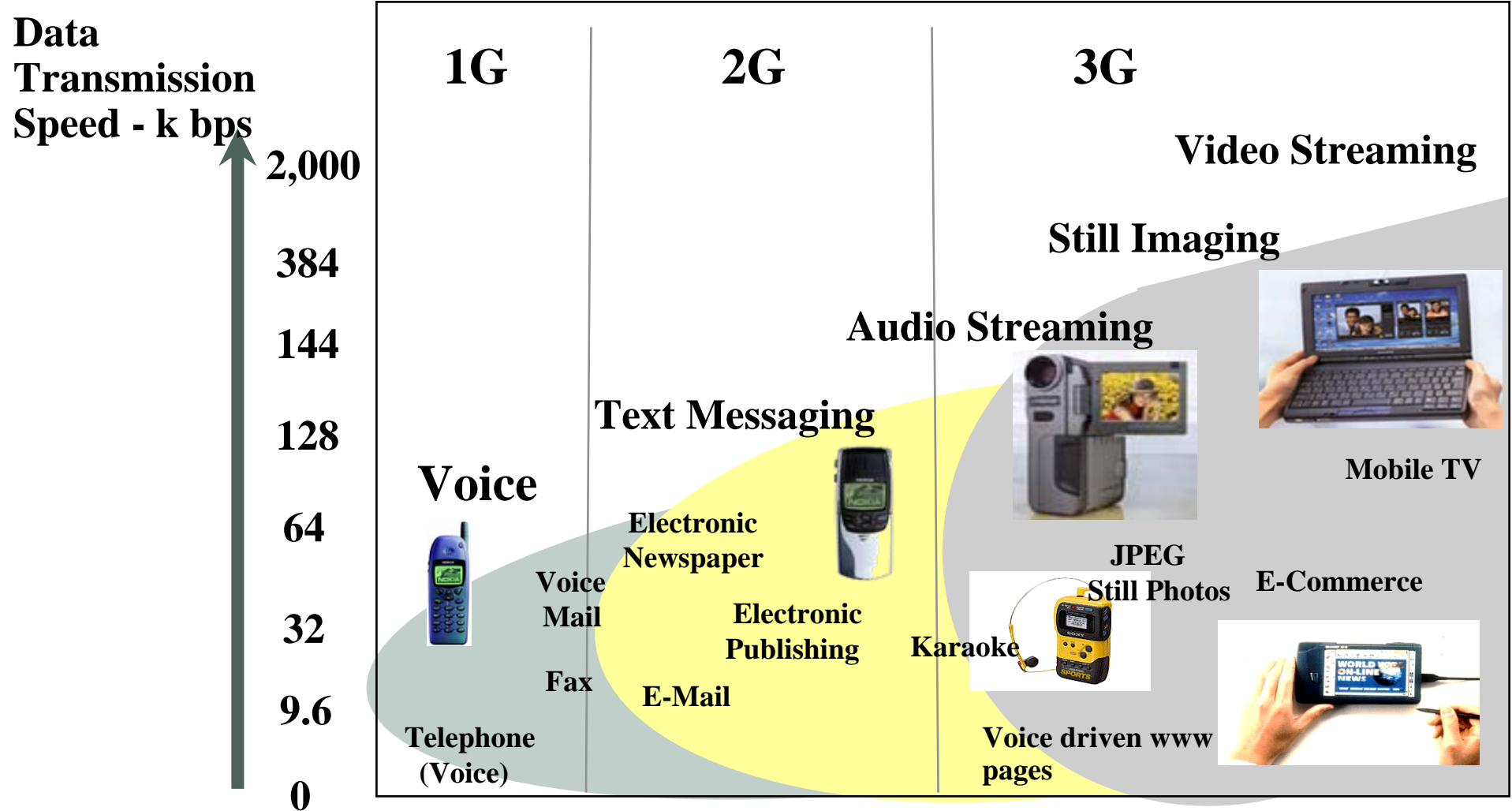


**Packet
Switching**



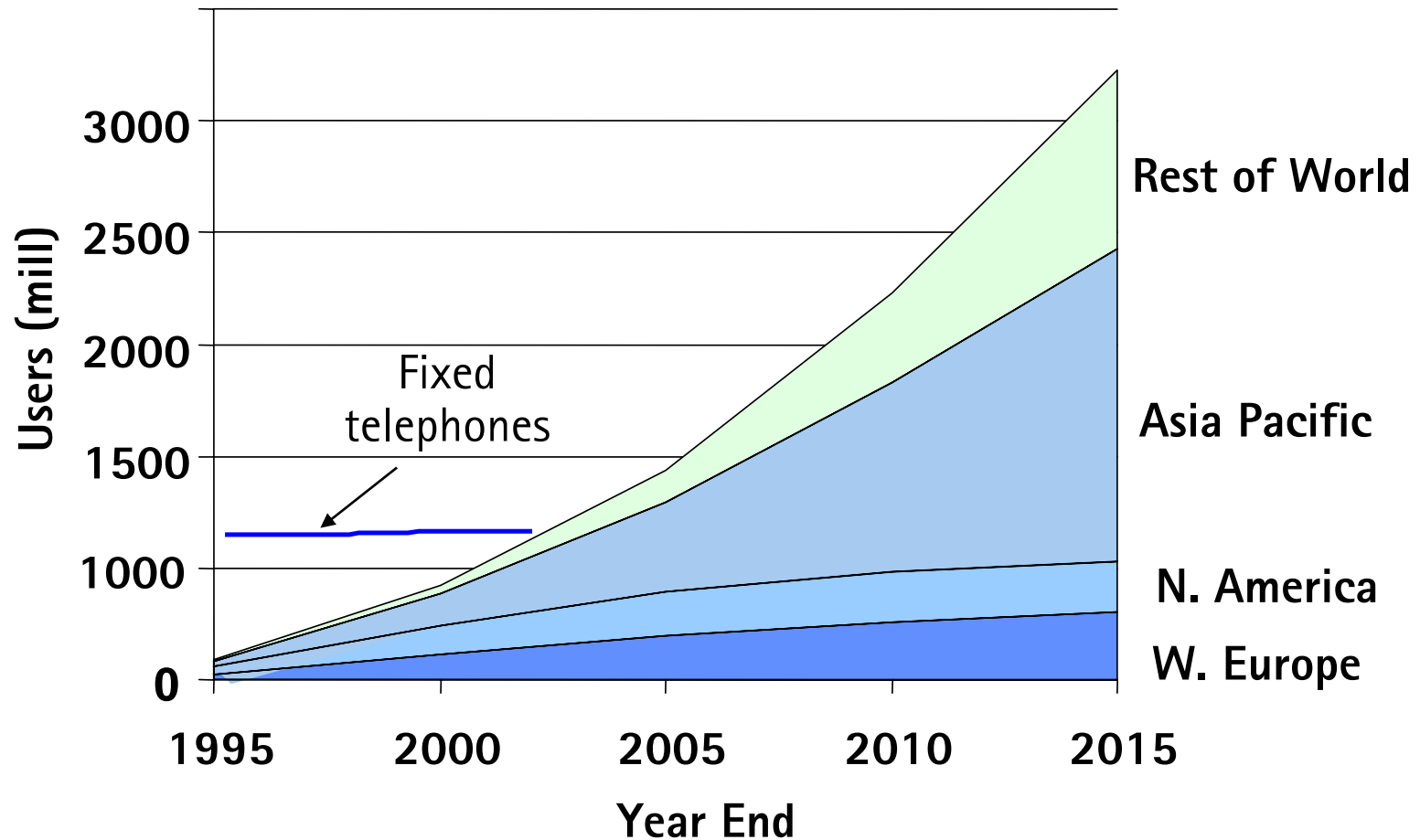
**Packet
Switching**

Digital Services Vision

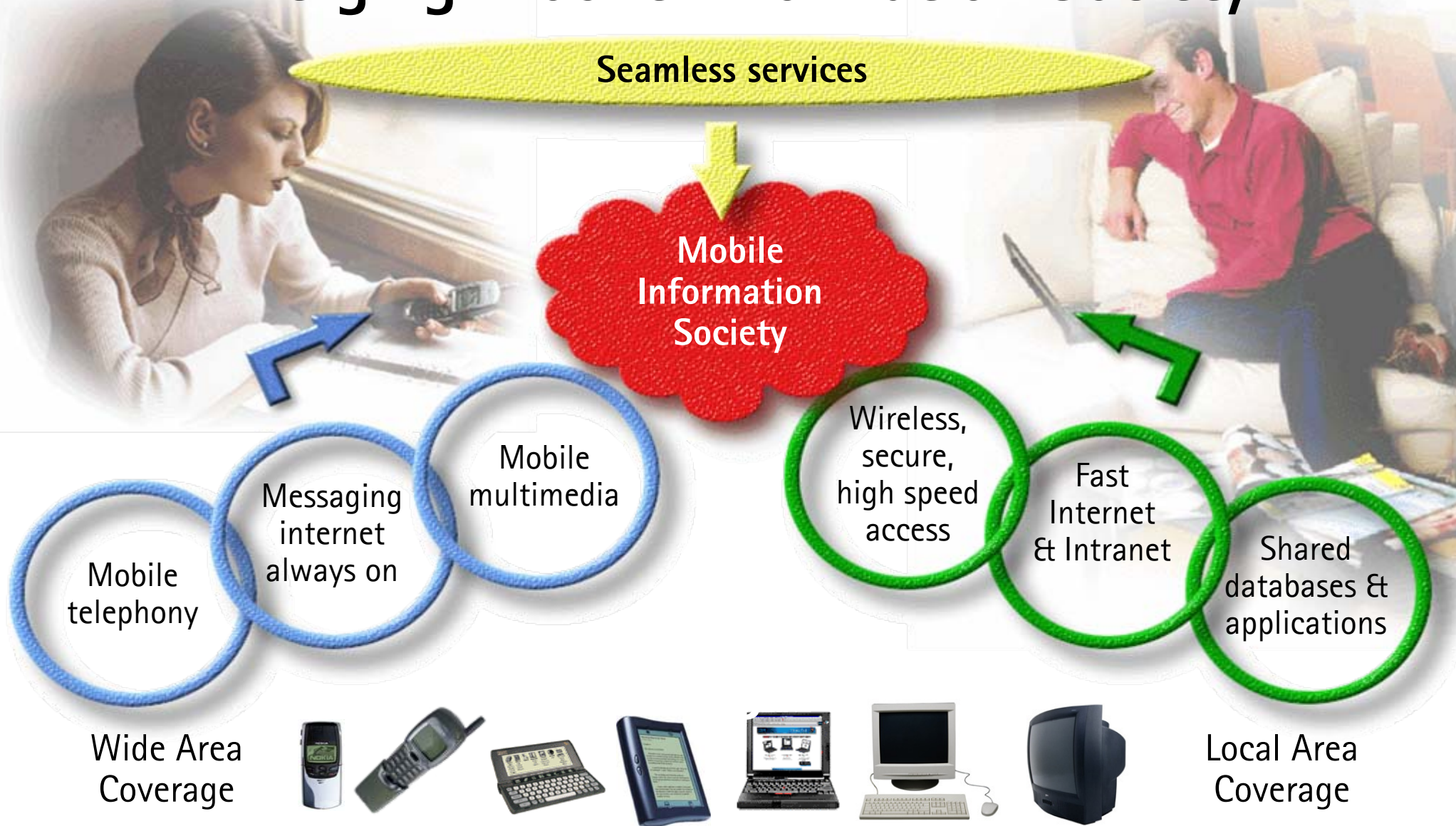


Future Wireless Market

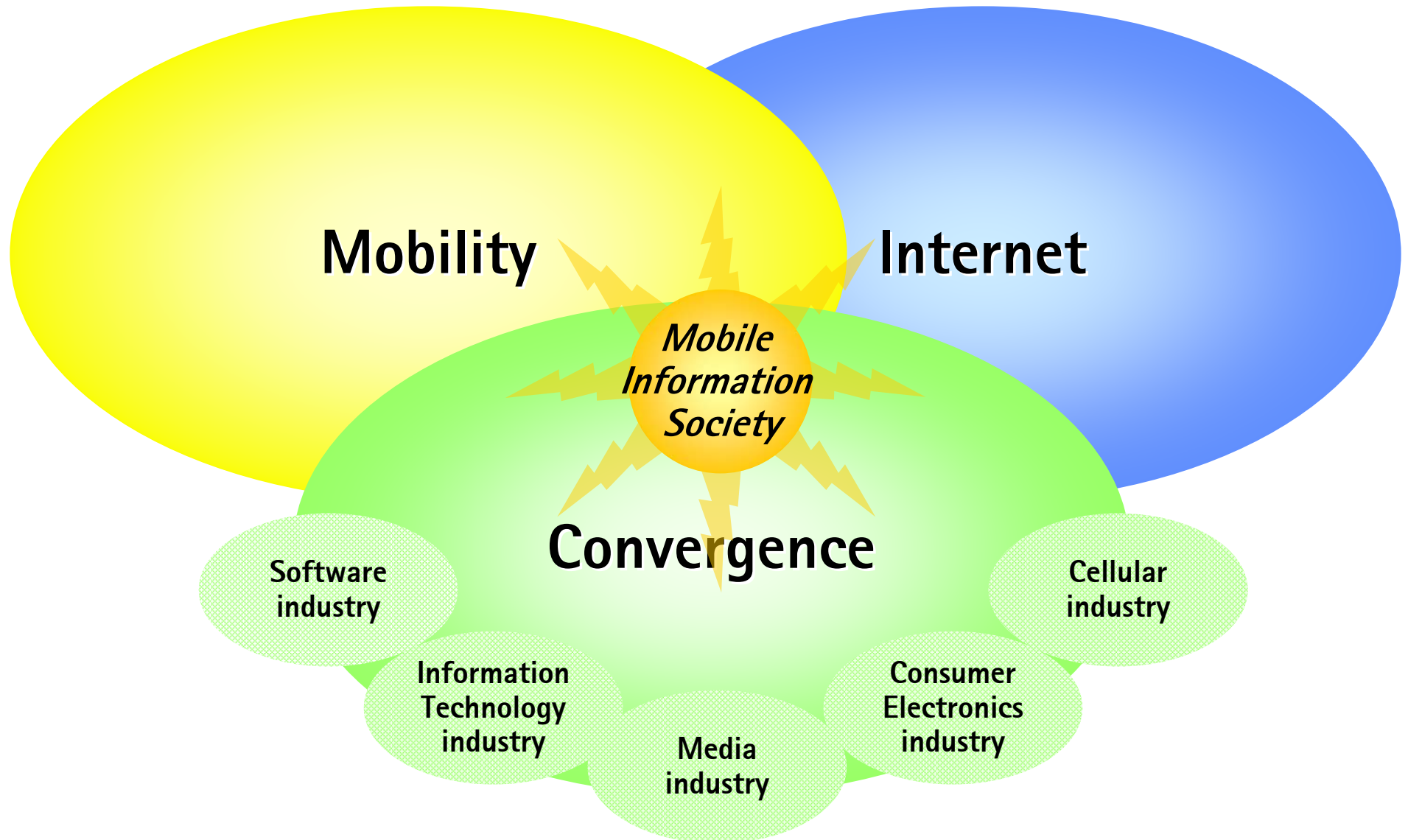
Source: UMTS Forum



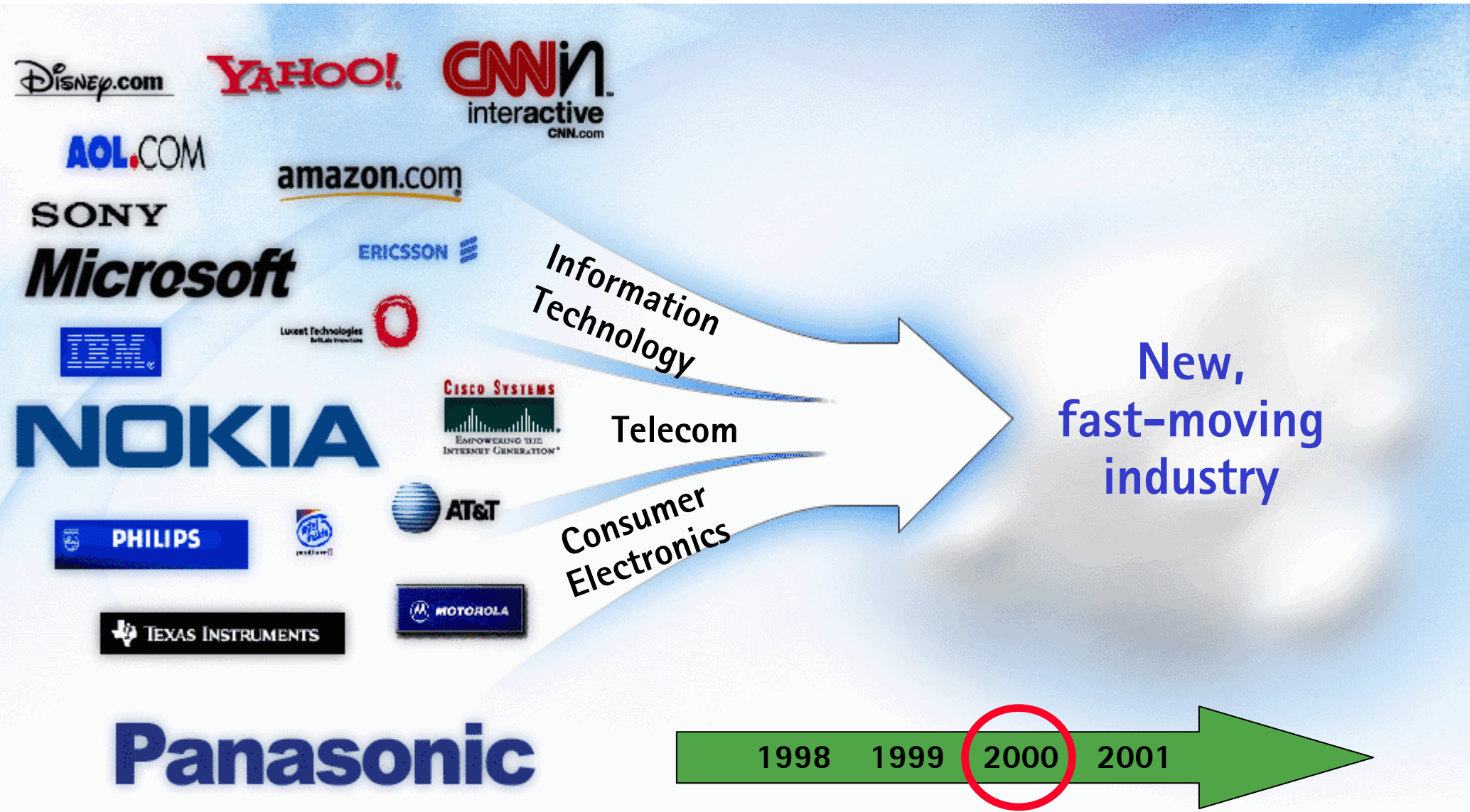
Emerging Mobile Information Society



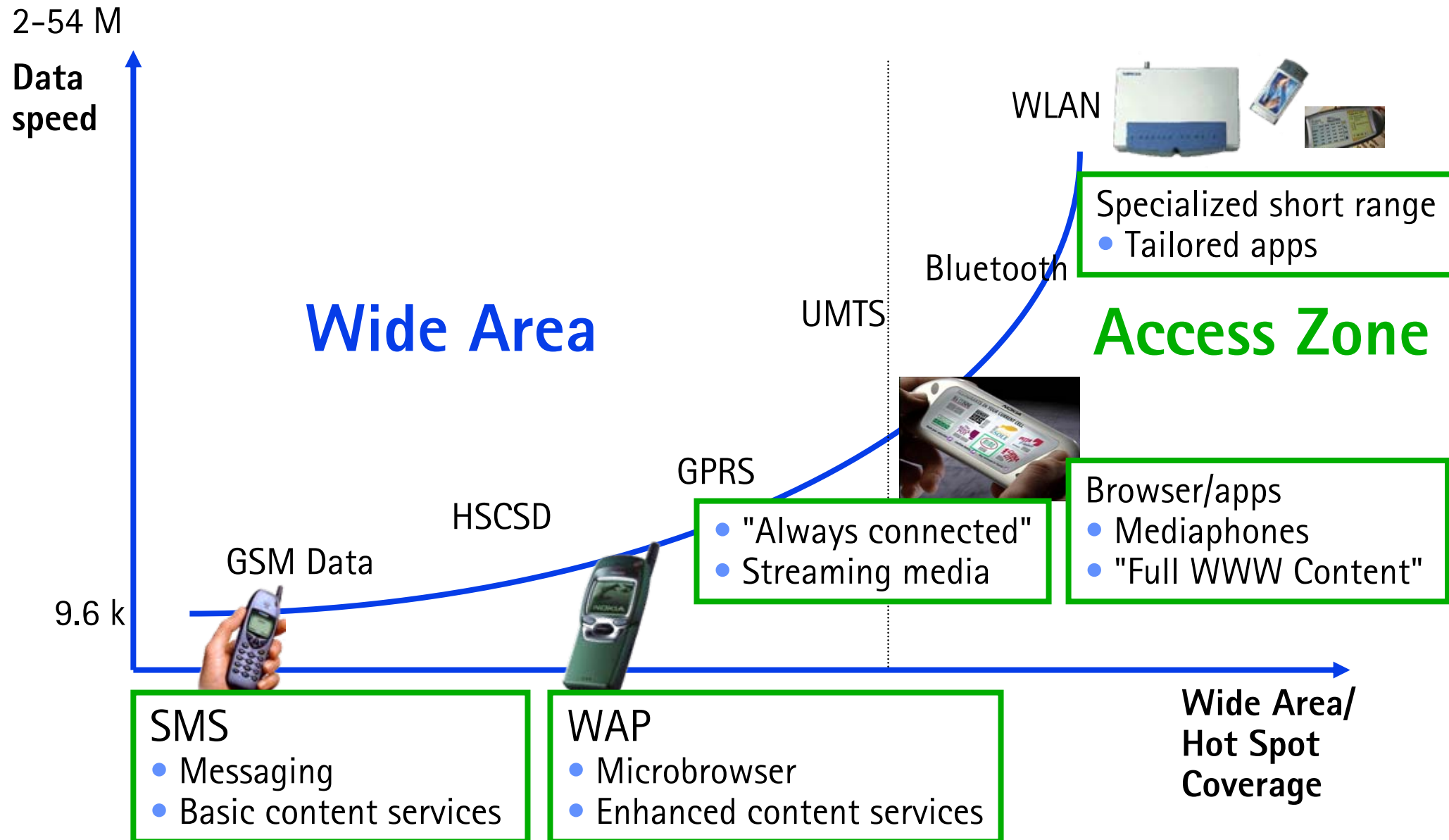
Drivers Of The Mobile Information Society



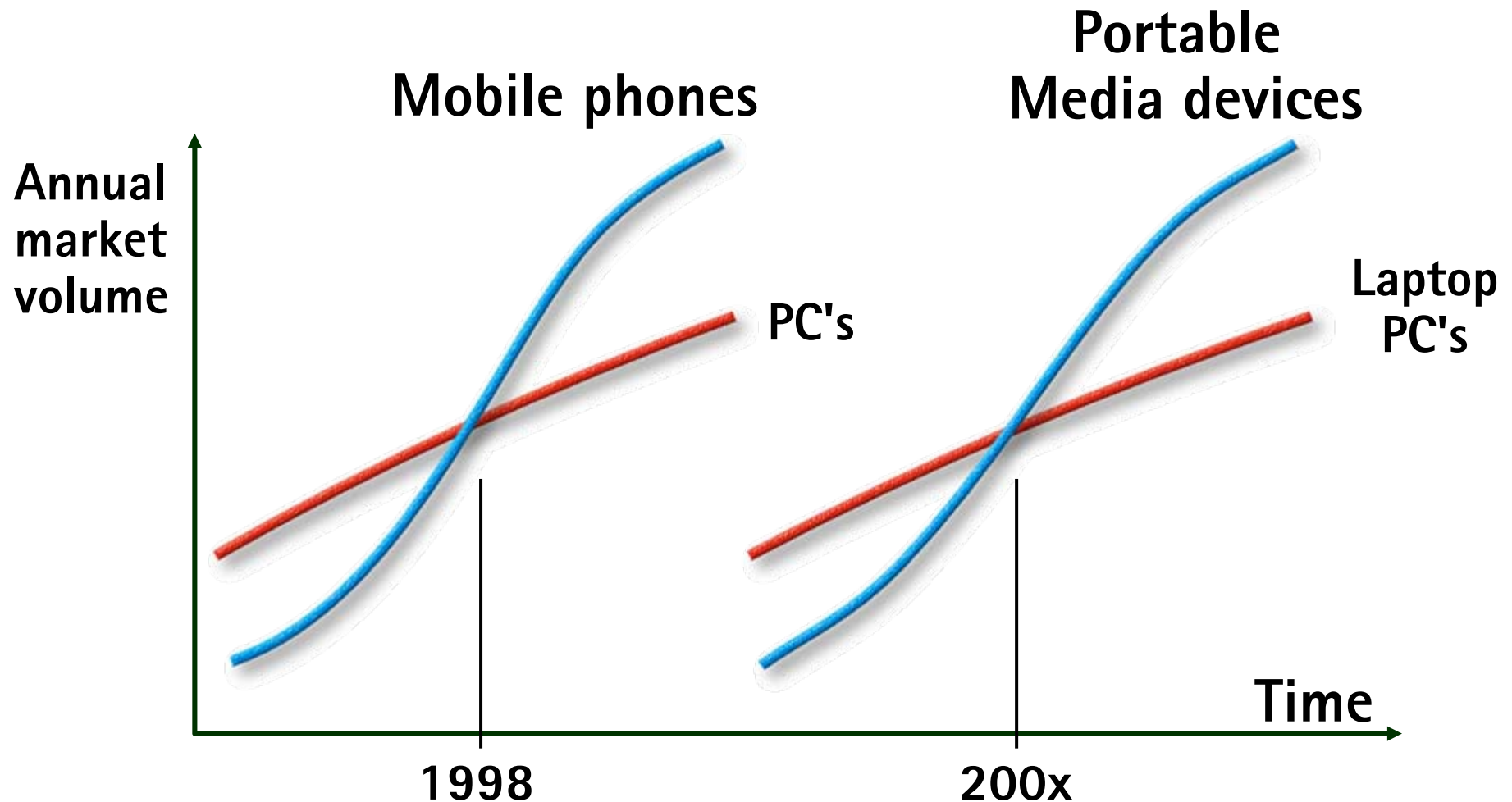
Digital Industries Converging



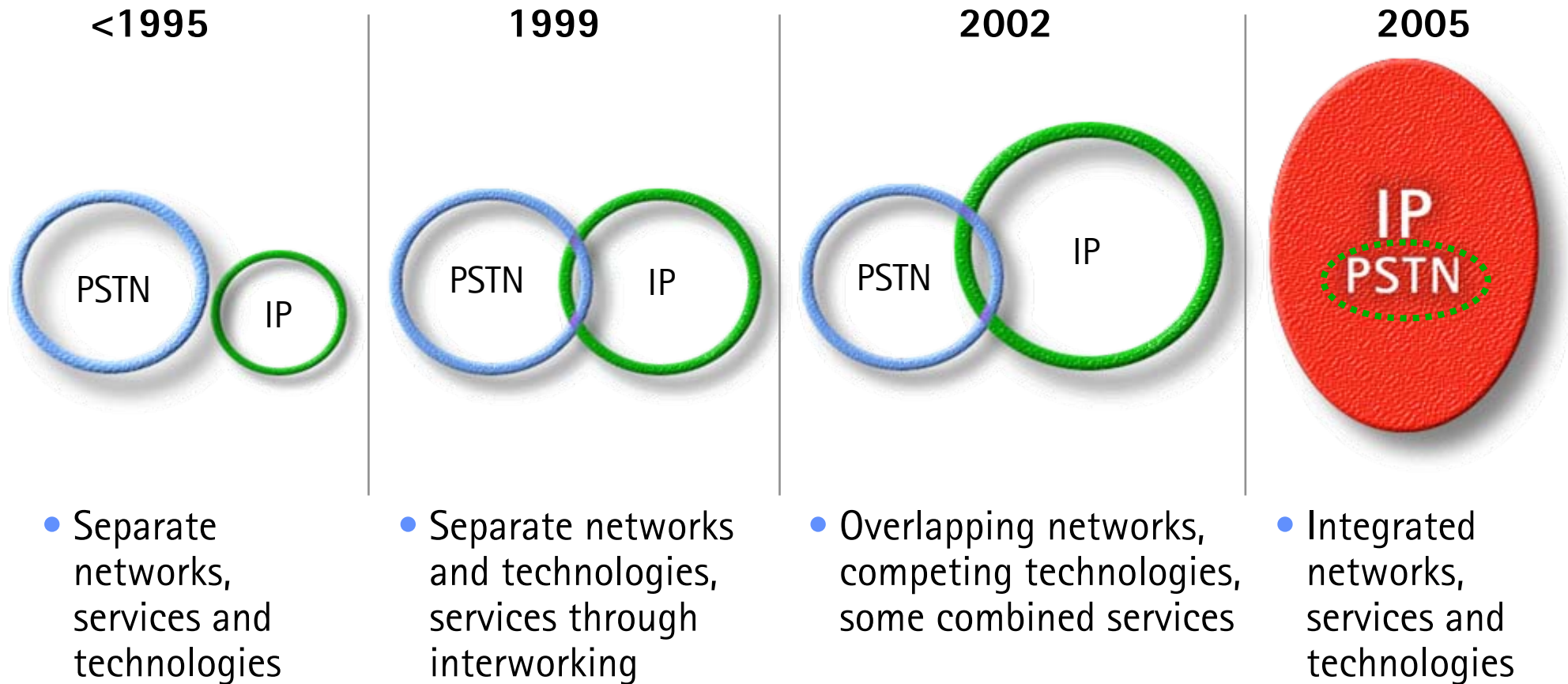
Applications in Wireless Networks



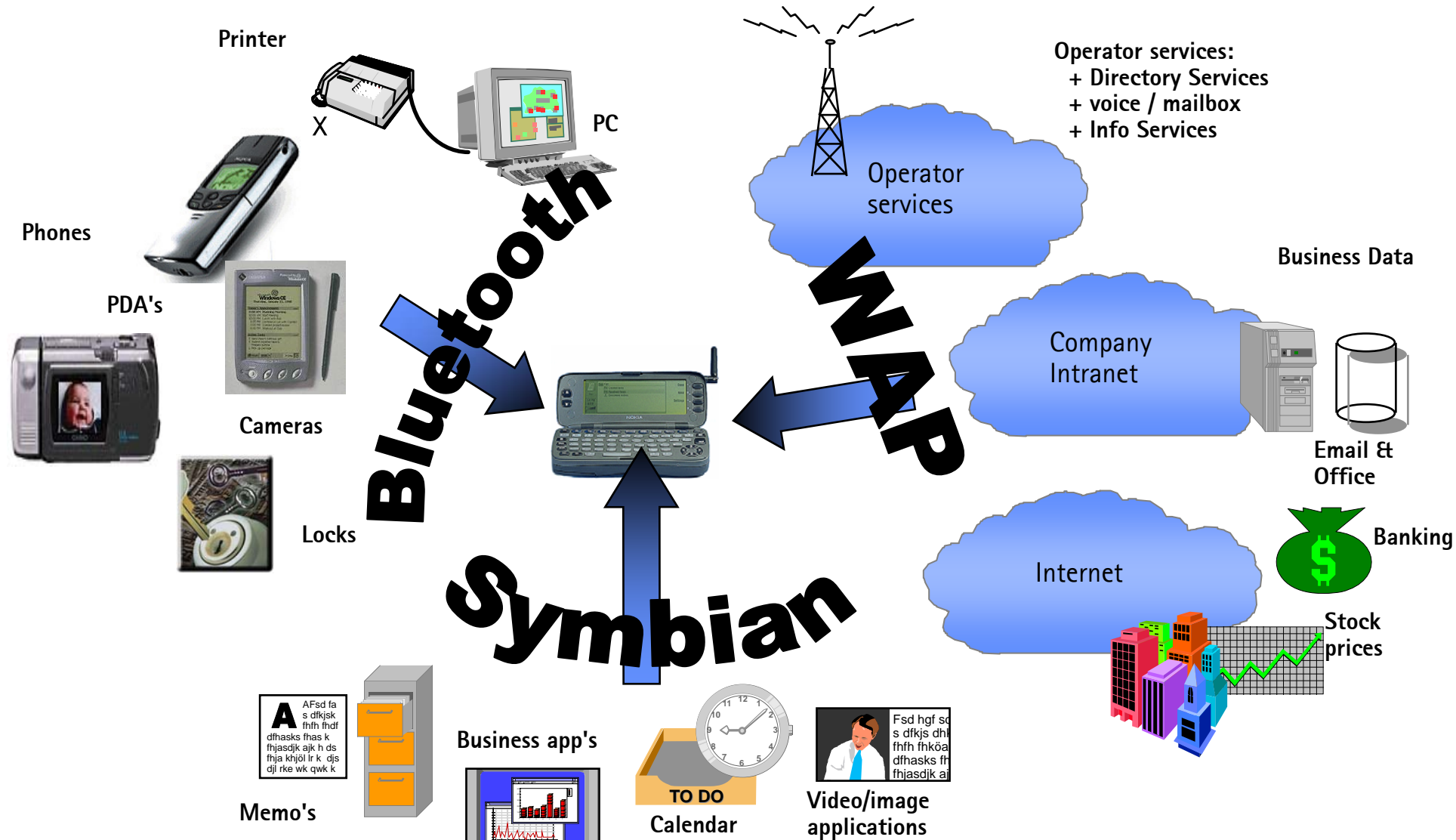
Mobility will be the standard in computing and communication



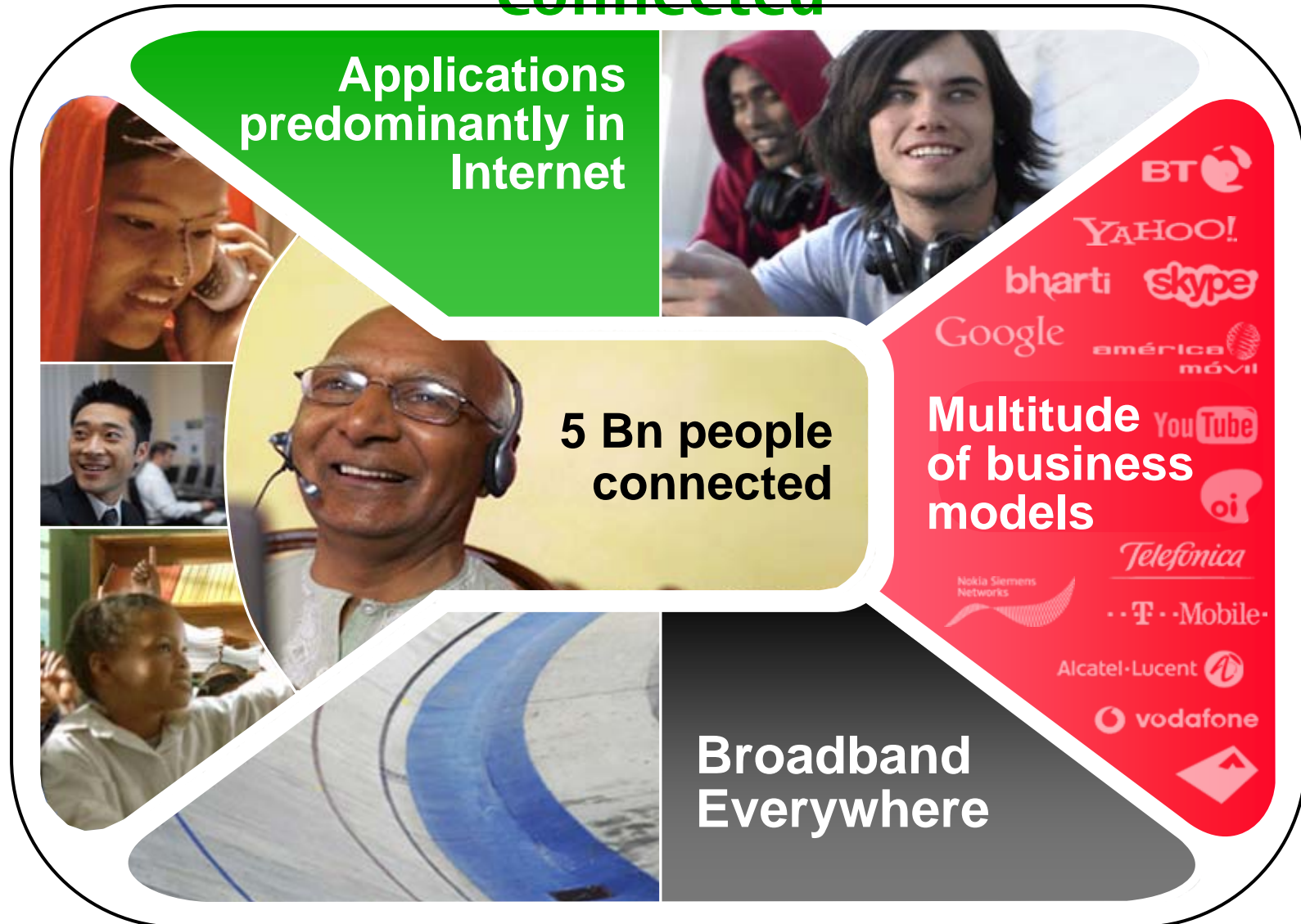
IP will dominate in the future



Open platforms and standards boost software and service development



Our market vision of 2015 – the World connected



We'll face a major scaling challenge...

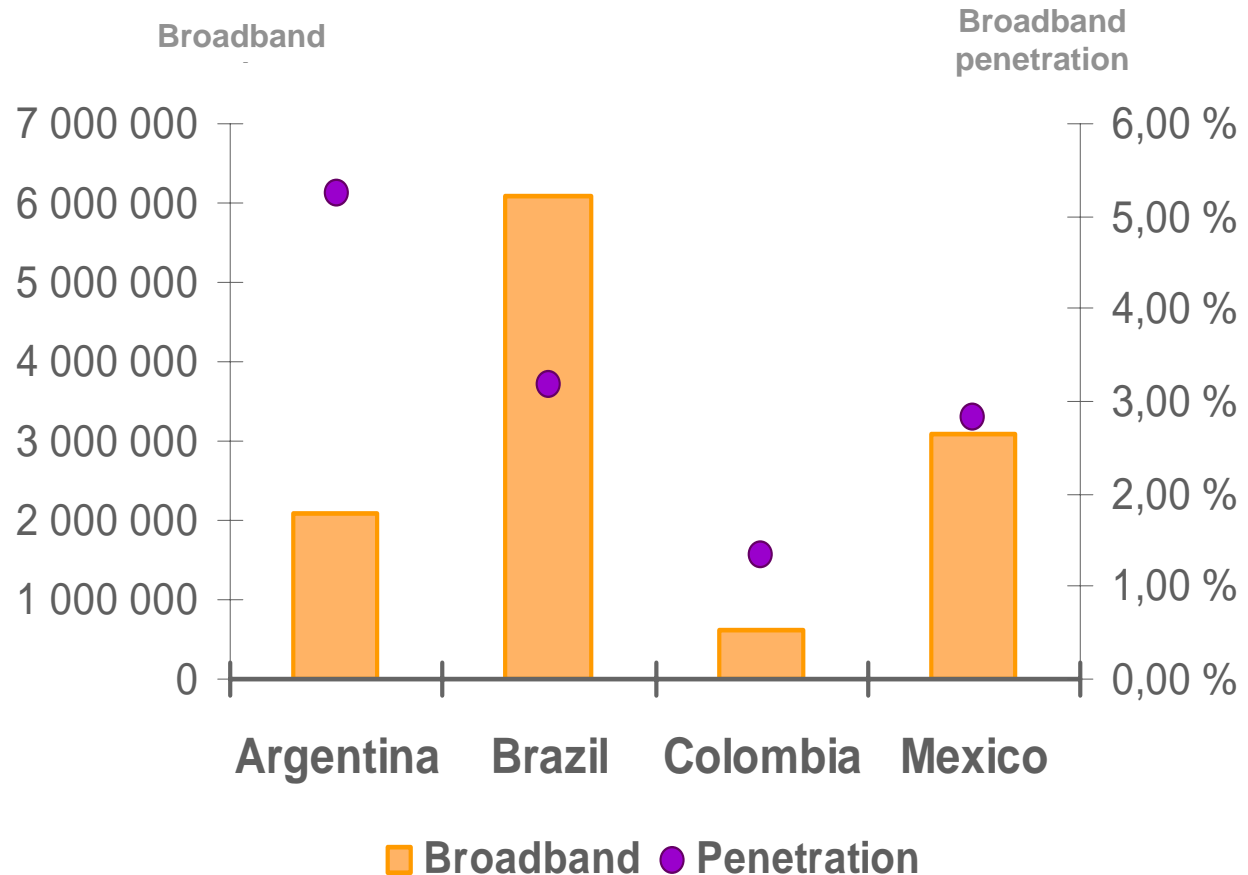
Key trends

1B => 3B broadband connected people

Bandwidth hungry applications (Video, P2P file sharing etc.)

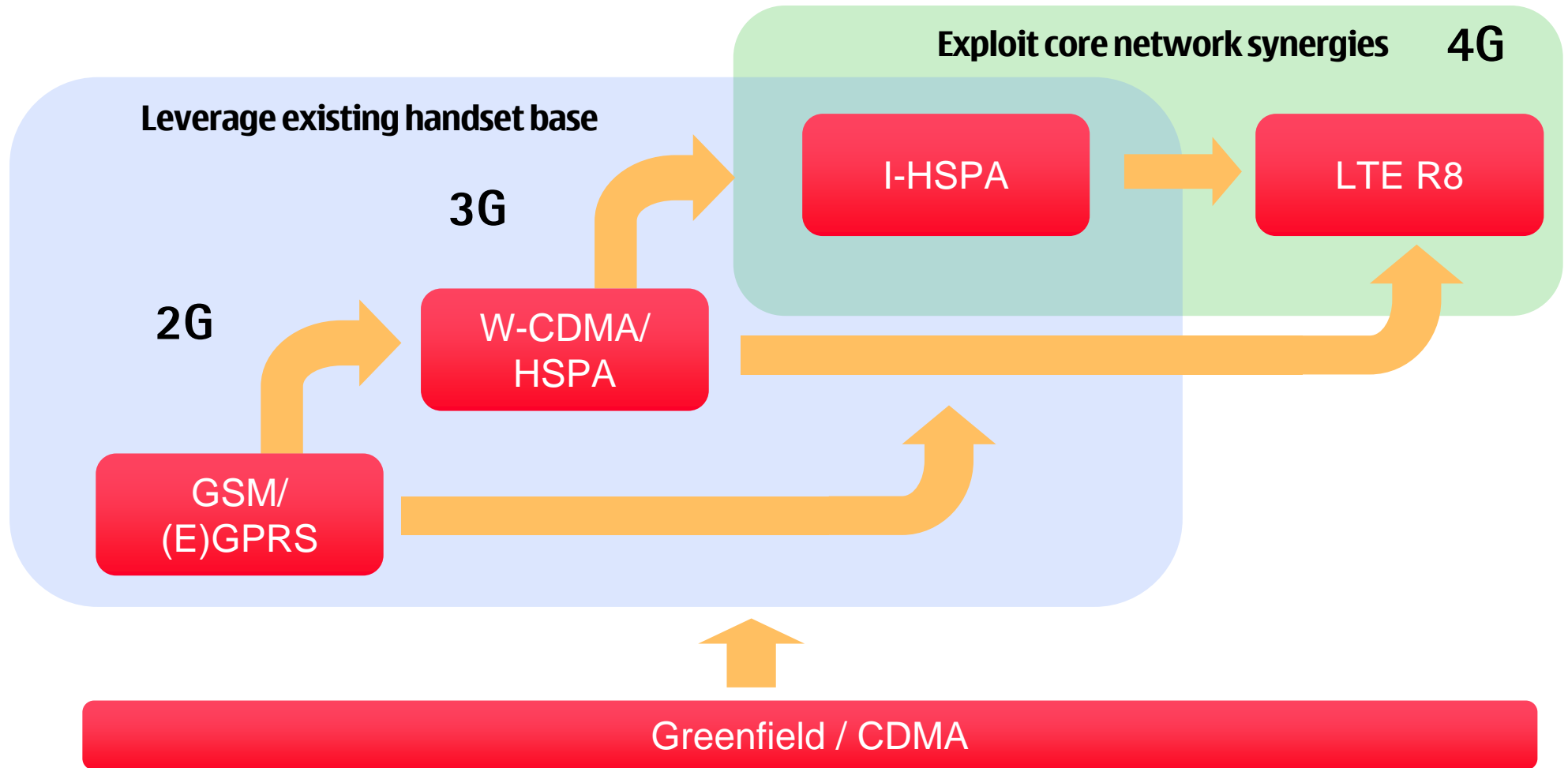
New devices driving data use

Flat-fee subscriptions



Source: inCode Global Market Watch / December 2007

Evolution Paths



Future Market Driver: Me, myself and I



I want mobility

- I want complete freedom from time and place
- I want effective communication and secure access to important information also when I'm on the move



*Whatever I do, wherever I am,
whenever I want*

*communication, information
and services will follow me*

"This is My choice for My life"



My own
services

My
databases

My feature
configuration

My money

My authority

My
calender

My own user
interface

My identity

I want Real-time services

Consult my
doctor

Pay the
bills

Train
myself

Check my
business
calendar

Check the
weather

Buy on-line

Buy airline
tickets

Check the
Sports
results

Trade Stocks

Watch
the news

Navigate
safely

Order
Pizza

Meeting the needs of people – lifestyle

My Place



Meeting Place



Market Place



Myself, My family,
My friends, My colleagues

- One-to-one connections
- Voice, text
- Customizable infotainment

My trusted
communities

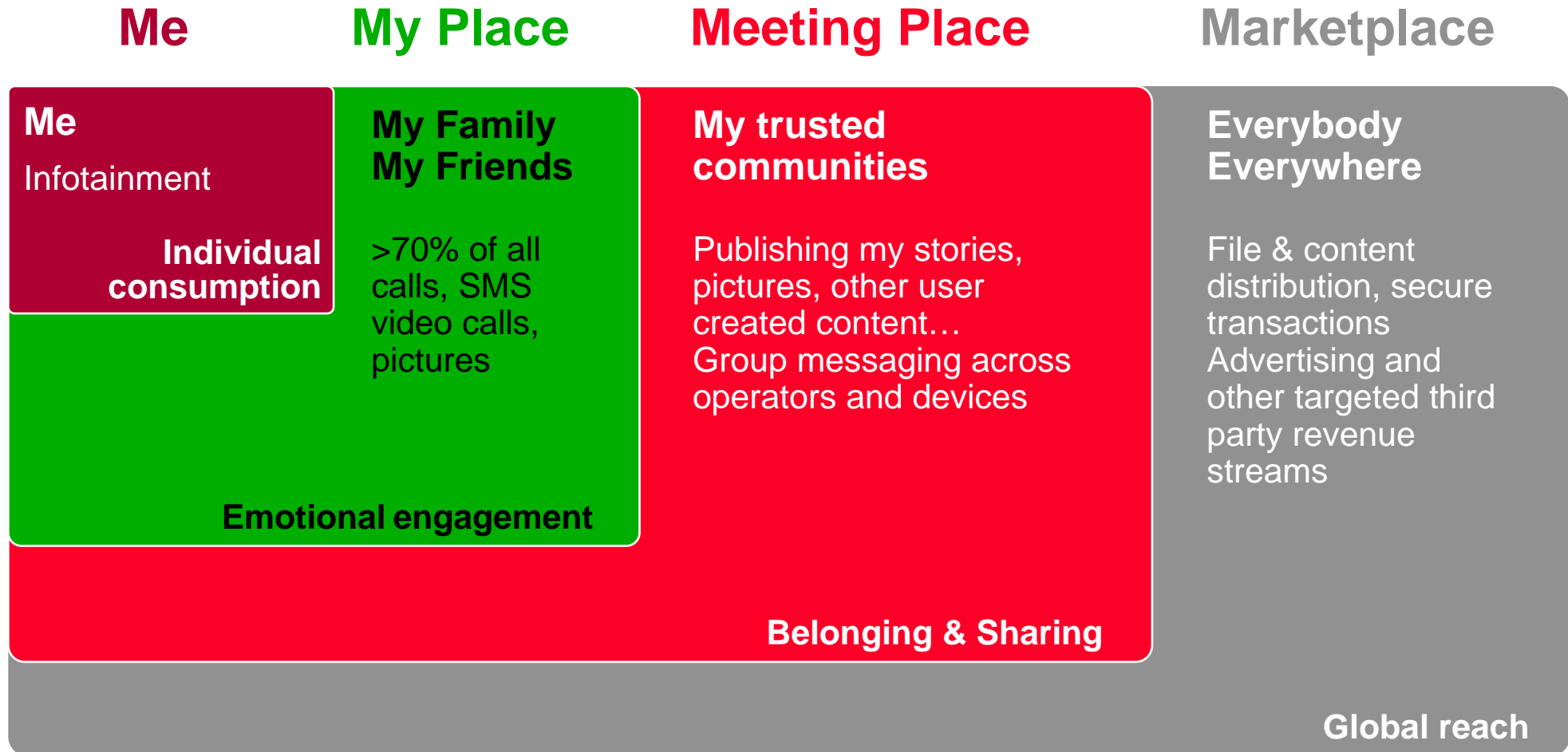
- Belonging, sharing and connecting
- Easily find people I know or work with
- Safely meet people and share experiences

Everybody
Every brand
Everywhere

- 3rd party products, servi content
- Social consumption
- Targeted advertising

Introducing new differentiating services

Connecting people to what really matters – enriching life



Sources: Mobilizing applications vision paper by NSN COO RTP, MIBA 2007 by Nokia

With the new way business we will see...

...improved efficiency and user experience in
person to person communications



"see what I mean"

"look!"





**...to real interactive mobile multimedia.
And a new transaction way.....**

...portals increasing user convenience

- Added user relevance through
 - personalisation (increasing also churn resistance)
 - location specific filtering

but they also increase operators/service providers capabilities

- Increasing service usage through easy (visual) navigation
- Easy market introduction of new services ("click-to-try")
- Advertising revenue potential from content providers links and banners



...mobile commerce expanding to include also payments, advertising, product display...

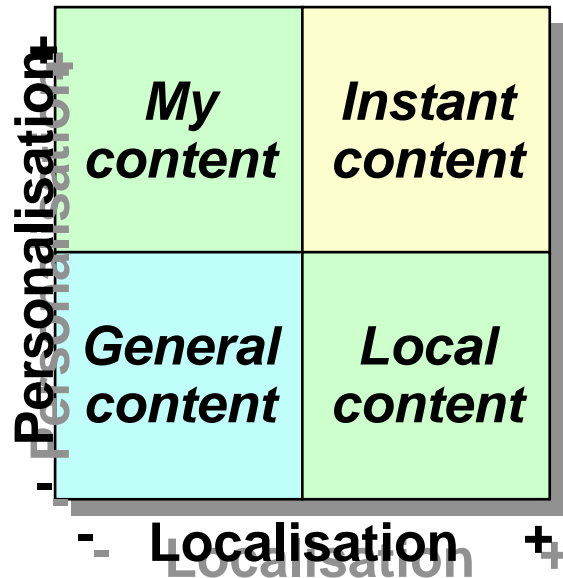
- Ability to visually display goods offered will increase mobile commerce usability
- Consumer to consumer sales (classified ads) will drive service usage and messaging volumes
- Location filtering of goods and services offered makes the mobile terminal a unique sales channel



The mobile operator has an important asset: an efficient machinery for managing micropayment transactions!

...increasing relevance of information services

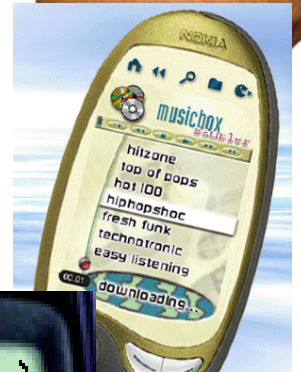
...with location sensitive terminals and services combined with capabilities for richer visualisation



The Mobile Internet is more than just Internet in Your pocket!

...the mobile terminal becoming a new media type

- real-time audio/video streaming on broadcast sites
- music and video "jukeboxes" (on-demand streaming or download)
- interactive media (games, quiz etc.)
- comprehensive rich content portals (tabloids, financial news, guide books ...)



Value is created through

- instant availability (mobility)
- relevance (personalisation and localisation)



I am ready to pay, if I can...

- Save money
- Save time
- Save trouble
- Have fun

...what would you pay for?