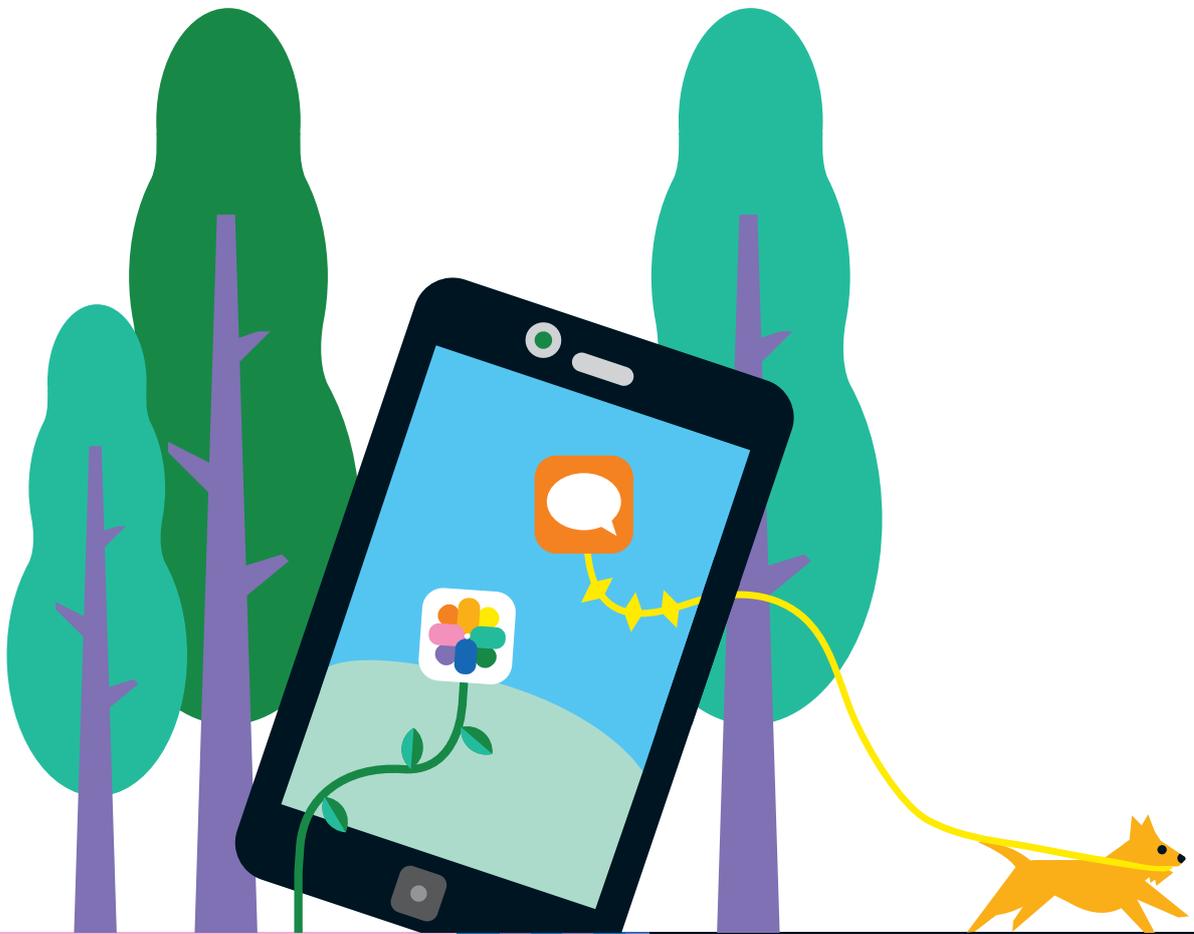




# Smile, you're connected!



## No. 6 Essentials

Orange 2014 – 2015

**From music and movies to games and more, digital technology is absolutely everywhere in our daily lives. It's fun and entertaining, and very sociable too... With Orange, add fun into your life.**

In 2014,  
you had fun with Orange.

## Facebook

Active Facebook users

1.2 billion

Users online every day

556 million

672 million tweets sent during  
the 2014 World Cup.

# 7.2

million Orange TV  
customers.



average time spent on  
smartphones every day.

## Innovative

### GigaStudio scales up

GigaStudio is a fully-fledged Internet lab launched by Orange Silicon Valley to explore and evaluate very-high-bandwidth applications and drive innovation. The underlying principle is “think end user”, helping all those looking ahead to ultrafast

networks to conceive next-generation applications. These apps will require gigabit connectivity and performance, such as low latency for gaming applications. Start-ups can test future services in a studio equipped with gigabit connectivity.



“Have A Nice Day” (HAND). As part of its loyalty programme, Mobistar Belgium treats customers to a series of exclusive concerts. On 18 September 2014, 2,000 customers enjoyed a concert by Mika, followed on 22 September by 5,000 more who got into the groove with Lady Gaga in Brussels. Mobistar picked up a Public Buzz Award for the Lady Gaga concert.

Orange was a partner of the VideoGame Story exhibition, one of the world’s premier videogaming events, held in Paris from 30 June to 7 September 2014. The gathering provided the opportunity to showcase our cloud-based multiscreen gaming services.

### The Orange Football Club mobile application

was launched to coincide with the 2014 World Cup in Brazil. The app gives football fans instant access to player and team information based on a similar service available to fans during the Africa Cup of Nations, for which Orange is once again title sponsor for the fourth time.



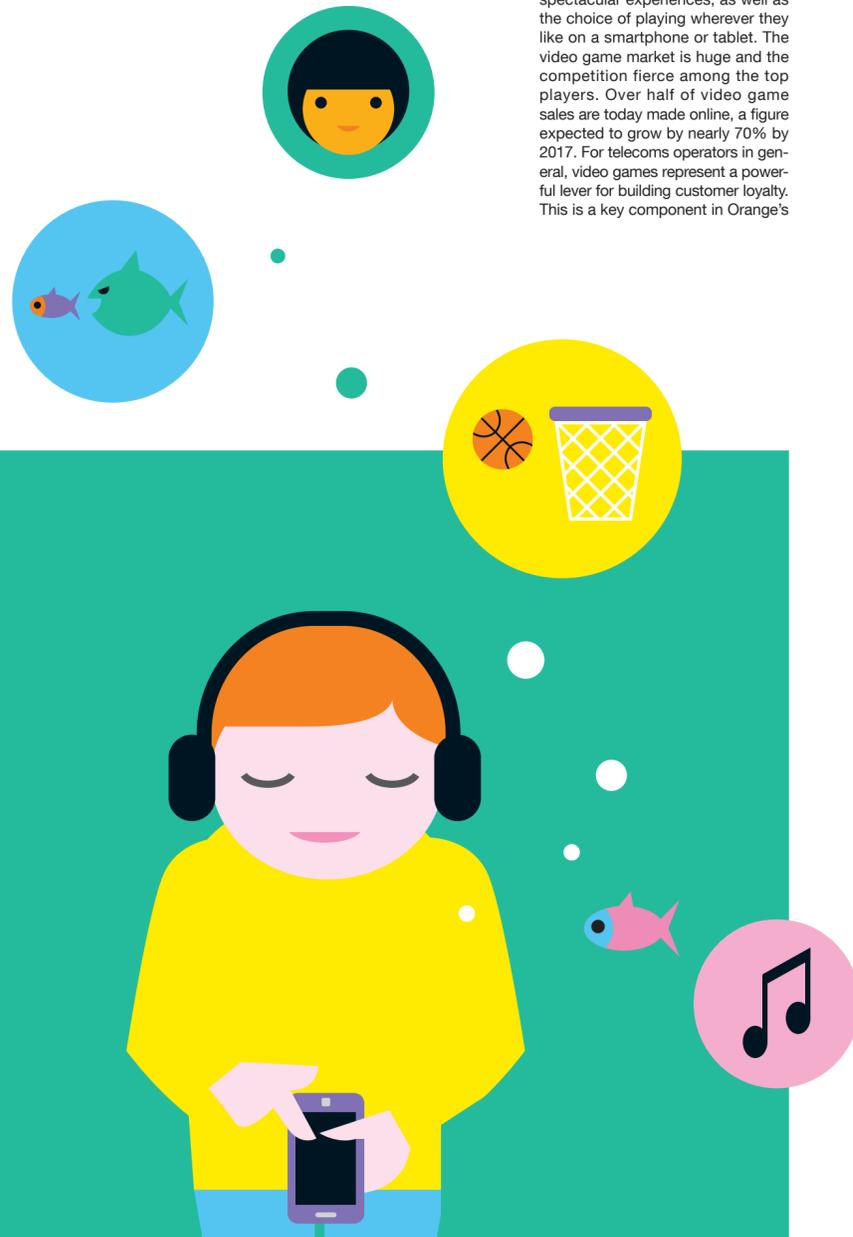
# Music, video and games get social

The digital entertainment area is thriving. Growth in online content delivery – music, movies, games and books – is restructuring the sector and helping it gain maturity.

## 1994 to 2014: huge changes in usage

In 1994, when you wanted the phone number for a garage you grabbed a bulky paper phone book. You bought road maps for a trip (and stopped frequently to look at them), and you queued at the cinema to buy a ticket. You called friends on the phone to tell them the latest joke, played Pacman on your console, wrote post cards to your grandmother and stopped by your favourite record shop to pick up the latest chart-topping CD. You changed the lens on your camera four times to get the perfect holiday shots

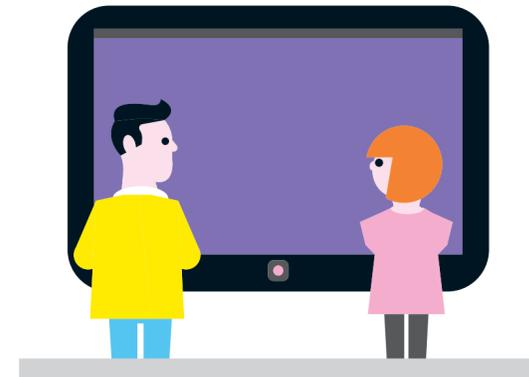
and always made sure you had coins in your pocket when you went out, in case you need to use the phone box. Today, your smartphone serves as an unlimited phone directory, GPS, ticket window, instant messaging device, mailbox, games console, music player, camera... plus a thousand other things. Oh, and also as a phone. Who would have guessed...?



Orange figures at the heart of the digital revolution now sweeping the industry, building a strategy of partnerships with content providers and offering seamless multi-screen experiences.

### Video game industry continues to race ahead

Today's visually stunning video games offer players increasingly spectacular experiences, as well as the choice of playing wherever they like on a smartphone or tablet. The video game market is huge and the competition fierce among the top players. Over half of video game sales are today made online, a figure expected to grow by nearly 70% by 2017. For telecoms operators in general, video games represent a powerful lever for building customer loyalty. This is a key component in Orange's



content strategy, with cloud gaming in particular identified as a strategic growth opportunity. Cloud gaming involves users streaming games from an Orange data centre rather than via a console or their Livebox. So instead of having to download and install games, it takes just a few clicks to be able to start playing on the TV. The Orange catalogue lists over 190 games that customers can rent or purchase after trying them out for free with Orange TV. The Orange Family Pass package lets children and parents choose from more than 150 family-orientated games. And to help parents keep their children safe while playing games online, Orange organized and in online videos series of gaming safety classes for parents at Orange stores and PédaGoJeux. Underscoring its cloud gaming strategy, in early 2014 Orange acquired a stake in the Japanese video gaming company G-cluster.

### The shape of TV to come

While the TV is still has pride of place in most living rooms, the surge in the variety of consumer devices has led to a radical shift in viewing patterns. The TV set has become a content delivery system that consumers choose when and how to use. Between 2013 and 2022, the number of screens per household is expected to jump from 6 to 13. At the same time, people increasingly opt to view and share multimedia content on their smartphone and even more so on tablets. Above all, users can select and even create their own content. All this has really shaken up the TV industry. In November 2014, Orange TV launched distribution of Netflix, the subscription VoD service, as part of its new unified Polaris interface.

Orange TV counted more than 7 million subscribers in Europe at the end of 2014. Subscribers to Orange TV in France have access to 160 channels, 30 of which are HD. These include a wide range of themed packages to cater to all tastes, including family shows, sports and movies. The OCS suite of movie and TV series channels, now available from all ISPs in France, has been steadily expanding since 2012, and counted 2.3 million subscribers at the end of 2014.

### Digital technology rocks the music industry

Streaming, downloading, concerts are transforming the way music is consumed due to the growth of streaming. Mobile, on-the-go consumption is the new norm, whether it's listening to favourite playlists while jogging, or instantly identifying a new song using music apps such as Shazam or MusicWatch. In 2014, Orange renewed its partnership with Deezer in France for a further four years to pursue their drive to grow their paying subscriber base. People mainly use it to share their playlists, favourite artists and albums on social media, including the Dailymotion platform. With 128 million unique visitors every month, in addition to music, Dailymotion has entered into content distribution deals with a number of major football clubs, including FC Barcelona, Olympique de Marseille and Paris Saint-Germain. Thanks to the new Orange Ligue 1®, Ligue 2® application rolled out at the start of the 2014 football season in August, fans of Paris Saint-Germain and Olympique de Marseille can now watch the French Clasicco live, along with all other French league matches.



## Orange Beacon

Orange Beacon sends targeted personalized content related to what they are looking at directly to their smartphone. The app has already been adopted in France by the Château de Versailles and the Dijon musée des Beaux-Arts (museum of Fine Arts). In early 2015, Orange launched Orange Beacon Tag, which has a built-in motion sensor, making it ideal for temporary events and exhibitions.

## Express Download Station

Express Download Station – currently being tested – offers instant downloads of newspapers and movies at hotspots in train stations or airports. Travellers can now stock up on content before boarding a train or flight. Express Download Station was co-designed with Orange partners.

## “Buy to keep” VoD option

In February 2014, Orange France expanded its VoD service with a “buy to keep” option. Choosing from a catalogue of classic as well as more recent movies from leading American and European film studios, customers can now purchase films and then stream them repeatedly on their TV, tablet or smartphone, with an option to download a digital copy to keep.

## Orange Sport Clubs

Orange Poland launched an initiative to help children, parents, teachers and sports coaches to set up sports clubs for young people, providing practical support in the form of equipment and e-training programmes. To date, over 100 Orange Sports Clubs have been created in Poland.

## HD+ comes to France

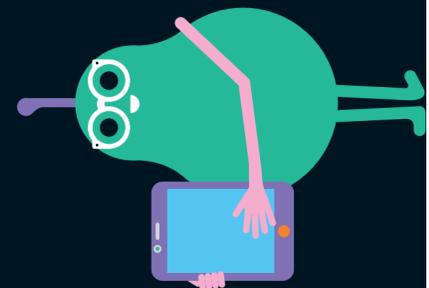
Hot on the heels of HD, Orange is now bringing HD+ to the 563,000 customers who already benefit from its fibre network in France. Available via Orange TV, customers can already enjoy picture quality that is twice as good as HDTV on more than 12 channels.

## 360° convergence

Changing screens without changing settings is now possible thanks to the new integrated Polaris interface designed by Orange. The same intuitive navigation and unified services are now available regardless of the screen – smartphone, tablet, laptop or TV. All your content is always at your fingertips for a truly seamless experience.

## 5 minutes to... learn while having fun

Digital technology doesn't have to be only for work, or only for play. Sometimes it can be for both. Massive Open Online Courses, or MOOCs, not only democratize learning, they also make it a pleasurable experience. The same is true when tablets replace book bags for school. More and more educational apps that make it fun to learn are becoming



available. Teachers team up with software developers to create enriched interactive content, including for the youngest learners in a fast-growing – and hotly competitive – market. Digital technology enables more personalized, less segmented learning experiences, bridging science, the arts, history and other disciplines to foster

broader, more integrated education. One example is the growing number of museums that use digital technology to personally engage visitors with content, creating new relationships with users. The looks on kids' faces at the Cité des Sciences science park in Paris is wonderful testimony to how technology and learning work brilliantly together.

In the same collection, Wellbeing, Family, Work, Money and Home.



# The Orange advantage

## Quality of service – our key asset

In today's ever-more digital world, customer touchpoints are often online, making best-in-breed customer relations and superior quality of service critical success factors. Orange's goal is to offer its 244 million customers worldwide a unique daily experience. Excellence in customer relations figures at the heart of our new "Essentials2020" strategic plan. To achieve this, the Group leverages the skills of teams in over 29 countries together with advanced, reliable networks. The aim is to make customer service more available and more efficient by developing more personalized, simplified interactions and offers. To do this, we are capitalizing on the complementary skills of our in-store assistants, our call centres and our live chat services, via all-digital channels.



## Customer relations to suit individual needs

At Orange, we let customers choose how they want to interact with us. Our solutions cater to all tastes and profiles, whether all-digital like Sosh in France, nju.mobile in Poland and amena.com in Spain, and the "Orange et moi" service app, or via direct interaction over the phone, by e-mail or text, or face to face with Orange assistants at one of our many stores. Above all, the aim is to provide maximum flexibility: someone who spots a solution they're interested in on our Web portal can then stop into their nearest store to subscribe, and then gets all the support they

need either by contacting a call centre or chatting online with a customer adviser. Thanks to enhanced customer experience and an increase in the proportion of digital customer relationships, Orange call centres saw annual traffic drop by 10%, amounting to 13 million fewer calls in 2014.

## Exemplary customer experience

Delivering an unrivalled customer experience is the result of several key factors. First of all, we ensure superior connectivity by developing reliable high-speed and superfast networks. We also put priority on data security and data privacy for our customers – illustrated by the Orange Personal Data Privacy Guidelines. And above all, we strive to be exemplary in our customer service. In 2014, Orange Poland and Orange Moldavia received COPC 5.1 certification for its good performance and customers relations. At the AfricaCom Awards, Orange won first prize in the Excellence in Customer Experience Management category for its "100% Successful Calls" suite of services. We continually review the design of our products and services, with some 600 tests carried out in 2014. In addition, to ensure that we deliver the best service possible, we regularly audit customer experiences. In 2014, 60 customer experience audits were conducted.

## Happy employees make happy customers

At Orange, we believe that a great customer experience ultimately stems from a positive employee environment. As part of our efforts to achieve this, we provide digital learning programs for all staff, with a particular focus on our store assistants. We also believe that workplace well-being plays an essential part in the image conveyed by our teams. Twice a year we conduct surveys to take the pulse on employee satisfaction (covering 4,000 employees). The latest survey, carried out in June 2014 by the CSA polling institute, showed that 92% of Orange employees consider that their quality of life at work is the same as or better than in other companies.

