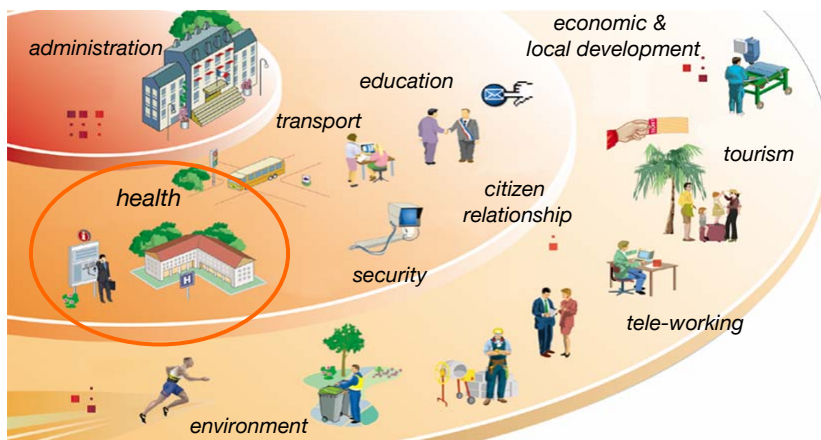


# new services: *the next step*

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## the group strategy is about new usages

*explosion of volumes and new usages emerging*



## agenda

- 1 what is health?
- 2 why is health attractive for the Group?
- 3 where should we play and which value at stake?
- 4 how to succeed?

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## 2 major markets addressed by orange health program

### medical services



- *all medical and medical related activities*
- *services to patients*
- *services and systems for professionals and establishments*

- *€ 153bn market in France*
- *€ 450bn in Europe (orange footprint)*

#### key trends:

- *lack of medical resources and expertises*
- *cost containment efforts*
- *increasing health consciousness and prevention*
- *rise of chronic diseases (7.5 M patients in France only)*

### services to elderly and disabled



- *at home services*
- *in establishments / home retirement services*

- *€ 18bn market in France*
- *~€ 50bn in Europe (orange footprint)*

#### key trends:

- *ageing population and increasing dependent people (9% over 75 years in 2010)*
- *people willing to stay at home as long as possible*

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source: orange European survey

## e-health: definition & market background

### e-health definition

use of information and communication technologies to meet the needs of citizens, patients, healthcare professionals / providers and policy makers

### health market is evolving

- from state-financed health system to increased private insurance involvement
- from doctor-centric to patient-centric
- from acute care to well-being

### favorable environment

- pervasiveness of internet, mobile and broadband
- low leverage of communication and new technologies

### market potential

- estimated addressable e-health market by 2010 is about €6bn (€1.9bn in France)
- orange ambition is to take 8% of market value (18% in France)

the growth in e-health is now the fastest of any sector and estimated to approach 15% and 20% per year for the next 5 years

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source: orange European survey

## market segmentation & solutions

### patients

### health players

#### medical



- prevention, education & coaching
- chronic disease remote monitoring\*
- remote consultation and diagnosis
- remote medical operations
- home hospitalization and care\*



- services to hospitals / medical establishments (tele-imaging, emergency management, hospital room services)
- services to health professionals\*
- services to pharmaceutical labs
- services to insurers and payers\*
- other inter-professionals services

#### elderly and disabled

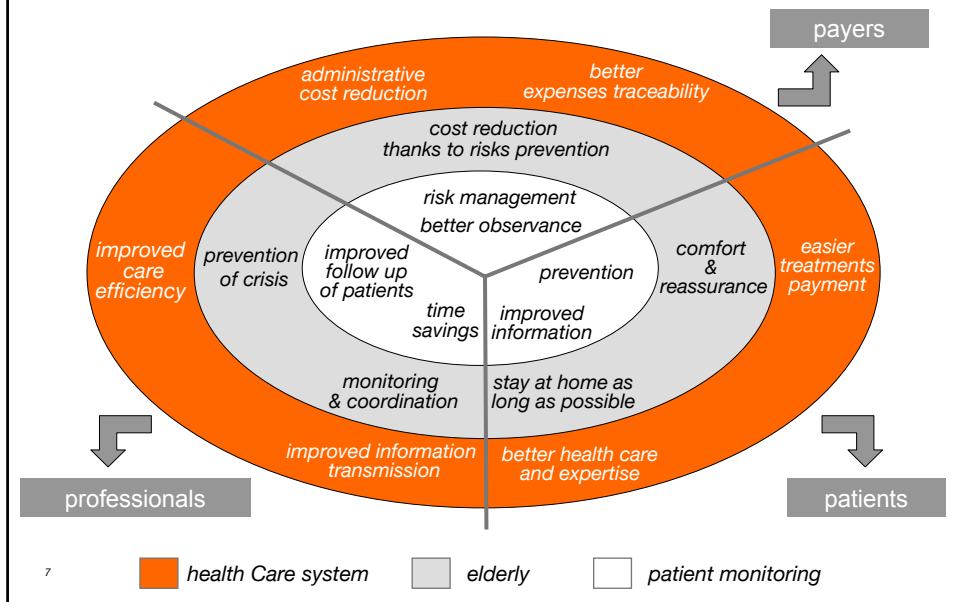


- at home stay / living services and support
- remote assistance and monitoring for non medical purpose

the group aims to generate c. 500m€ of new yearly revenue by 2010

6 \* short-term priorities

## information and communication technologies bring benefits to all players

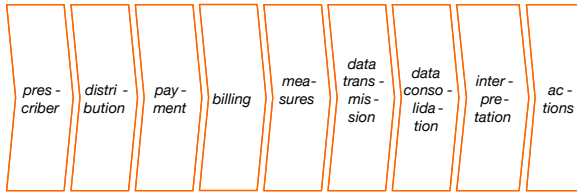


## key success drivers: orange has a unique blend of assets



## key success drivers: orange value added services

### example of chronic disease monitoring stakeholders and value chain



doctors & pharmacies



pharmacies



insurance



orange



vendors



orange



orange



doctors & insurance

- orange will take care of terminal provisioning, networks, data transmission, aggregation and delivery to health professionals
- thus, orange will be a key partner at the centre of the medical processes, leading to greater responsibility but also delivering greater value
- we estimate that 20% of chronic disease patients will take a remote monitoring service, sold between 10 & 20 € per month

the significant savings obtained through remote monitoring could lead up to 15-20% of cost reduction

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## summary

### our priorities in 2007

- improve existing service offerings like
  - almerys payment solutions
  - tele-assistance
  - new generation of orange Internet access to health professionals
- launch a new series of solutions
  - chronic disease remote monitoring (hypertension, diabetes...),
  - home discharge/care
  - electronic health record

### our vision for 2010

- to be a leader in the e-health market in Europe
- evolve e-health portfolio according to all identified domains
- have a turnover of 500 m€ with e-health players

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