



Capital Markets Day

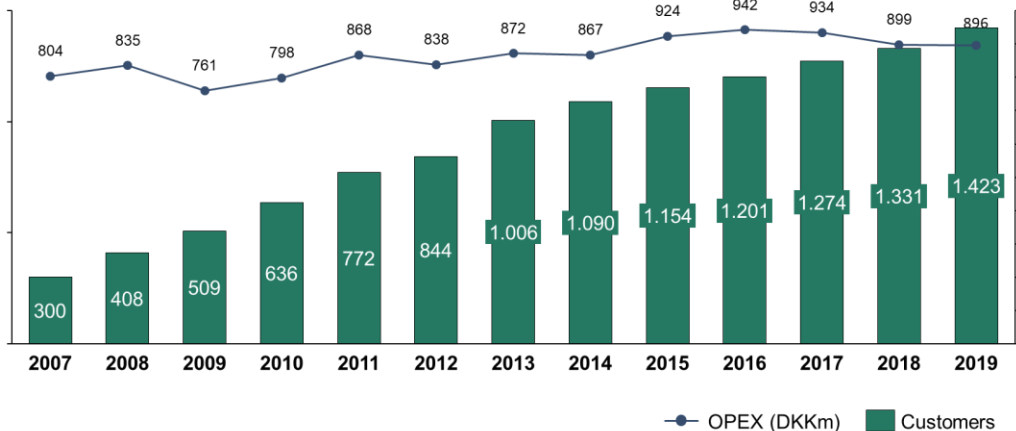
Morten Christiansen, CEO, 3Scandinavia

13 November 2020

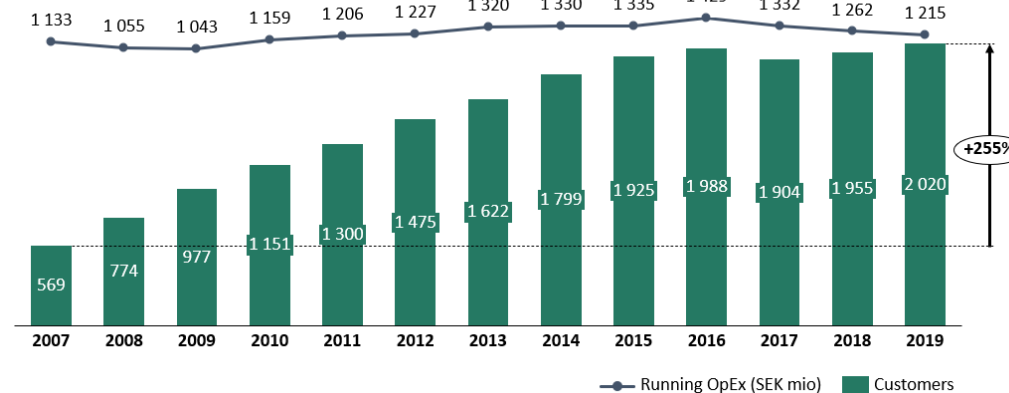


OVERVIEW

Customer Base & Opex Development 2007-2019



3SE Customer Base & Opex Development 2007-2019



- Mobile network operators driving "3", "3Business and as 2nd brands, OiSTER & Hallon in Denmark and Sweden
- Market position in Sweden #4, market share 14%, and in Denmark #3, market share 18%
- In both markets "3" and 2nd brands are in clear challenger positions
- Hacking growth by clever propositions with generous data volumes, service-focused and sales-driven organisations, using out-of-the-box market propositions.





MAIN PROPOSITIONS 3DENMARK & 3SWEDEN

- OiSTER & Hallon
 - No frills, affordable, sim-only propositions, easy, simple, online, no binding
- 3Residential
 - 3Sweden: "3Samla", clever family bundle, handsets + subscription, "3Världen"
 - 3Denmark: "3LikeHome", use your subscription in 66 countries at no extra cost

MAIN PROPOSITIONS

3DENMARK & 3SWEDEN

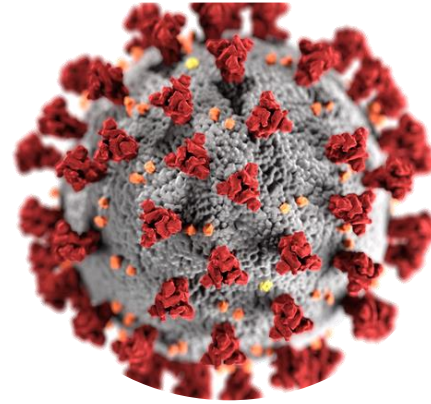
3Business

- 3Sweden
 - One size fits all, unlimited, low price, what you see is what you get: simple, easy, generous data bundle
 - "3Världen" as an extra USP ➡ SMB
- 3Denmark
 - "3LikeHome", simple, easy, generous data bundle ➡ SMB + LA
- Enablers
 - Simplicity, outside-in, value-for-money, IT-solutions, network



CHALLENGES

- Slowdown in demand caused by Covid-19
 - Shifting focus from "travel product" to domestic product
 - Pushing (like crazy) mobile internet as a product
 - Pushing even more online sales and restructure parts of business to increase utilization of resources



5G

INFRASTRUCTURE COMPETITIVENESS

- Bidding for 5G in both countries in near future
- Using 5G for growth – eating slices of the market from fiber
- Utilizing mobile focus to gain speed while multiplay competitors' struggle to focus and find synergies



KEY TAKE AWAYS

- Maintain and build a challenger position
- Use 5G to eat competitors' lunch
 - Mobile fiber → expanding market potential
- Focused on mobile, simple and easy – outside-in thinking
- Never waste a good crisis

