



# Nokia - New era of mobility

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# Industry structure evolves – competitive fundamentals develop

## Fundamental competitive requirements

- Consumer understanding
- Brand
- Products
- Distribution
- Partners
- Innovation
- Efficiency



Horizontalization

Competitive changes

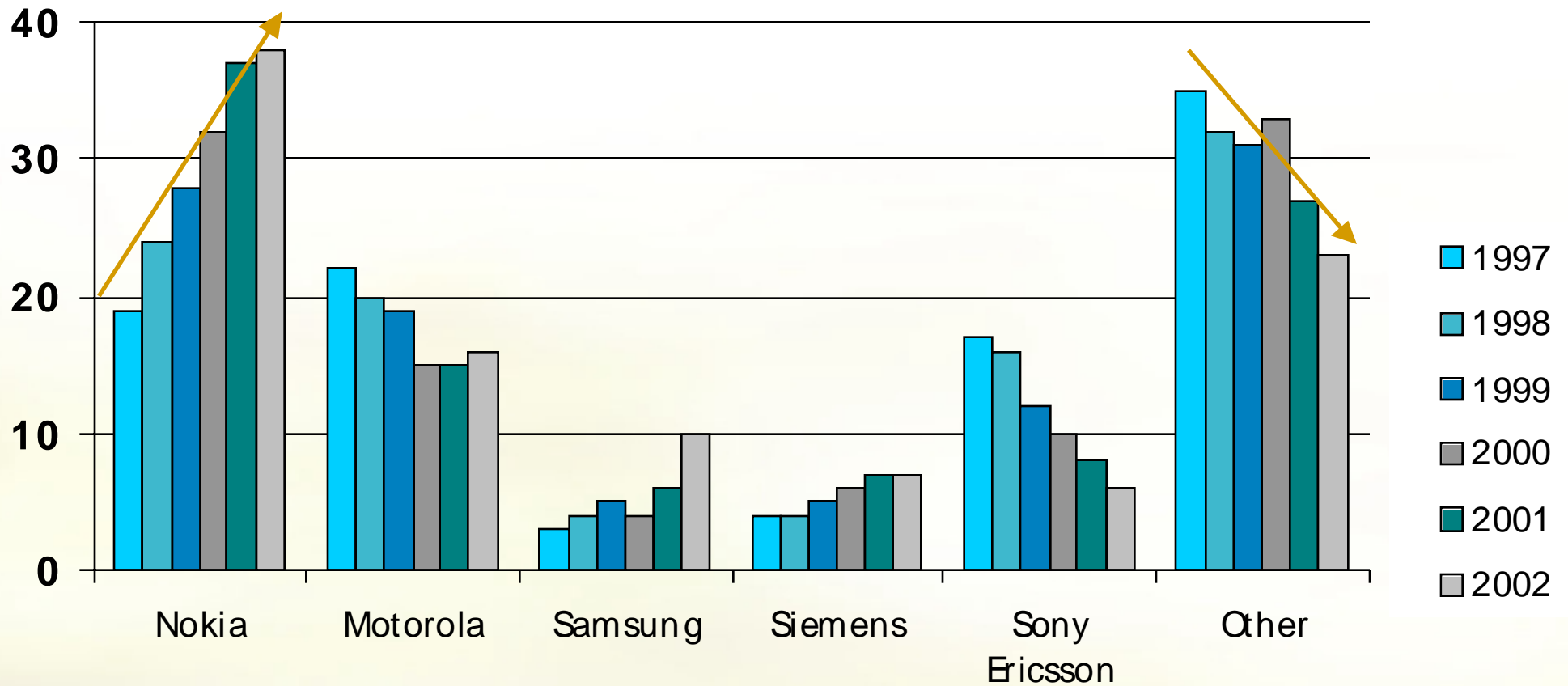
Voice commoditization

New technologies

Software

Operator finances

# Nokia approaches 40% market share target in mobile phones...



Source: Nokia 2003

# ...And makes headway in new value domains

## Nokia becomes the market leader in smart handhelds in Europe

Top 5 Smart Handheld Device Vendors, Western Europe, Q4 2002

	<b>4Q02</b>	<b>Share</b>
<b>Nokia</b>	749 000	49%
<b>Palm</b>	355 000	23%
<b>HP</b>	147 000	10%
<b>Sony</b>	79 000	5%
<b>Orange SPV</b>	41 000	3%
<b>Others</b>	157 00	10%
<b>Western Europe</b>	1 528 000	100%



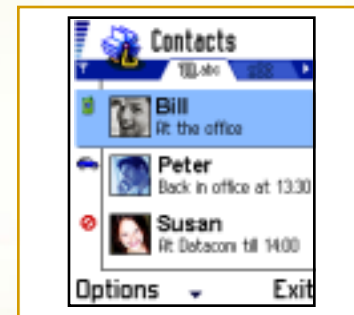
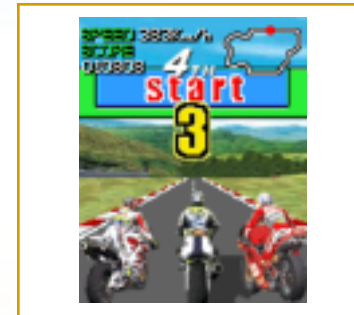
Source: IDC, 2003

# Mobility expands into new areas



# Technologies based on open standards enable new mobile services

- Color displays
- MMS
- Imaging
- Video
- Streaming
- Symbian
- Java
- WAP2.0: XHTML and TCP/IP
- Positioning
- MIDI
- Presence
- DRM



# New Nokia products –available in shops now

**Nokia 3650**  
Shipping since February



**Nokia 2100**  
Shipping since January



**Nokia 6800**  
shipping in March



**Nokia 5100**  
Shipping since January



**Nokia 6100**  
Shipping since January



**Nokia 7250**  
Shipping since February



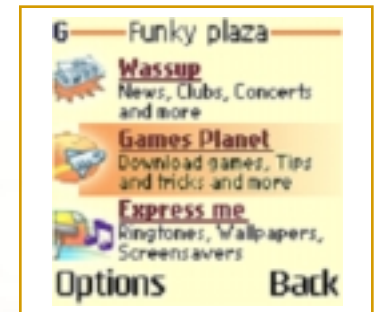
**Nokia 8910i**  
Shipping since February



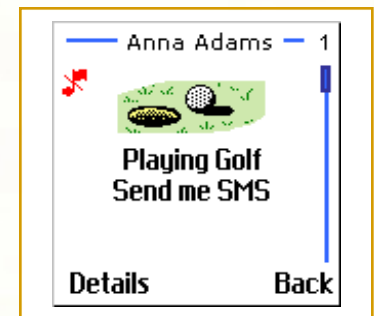
# Key technology enablers - EDGE, TCP/IP, XHTML, Presence

- EDGE
  - Introduced globally: Americas, APAC & Europe
  - Higher data speed, enhanced efficiency
  - In most new Nokia GPRS terminals from H2 2003 onwards
- TCP/IP & XHTML
  - Faster
  - Richer content
  - Easier content creation
- Presence
  - Stimulates new forms of communication and personalization of applications

## XHTML



## Presence



# Nokia 6220 – Visualize Your Business

- EDGE – data speeds up to 118.4 kbps
- Mobile e-mail
- Data Synchronization with PC (local & remote)
  - Calendar
  - Contacts
  - To-do list
- Integrated camera & MMS
- Presence
- XHTML & TCP/IP
- Tri Band (GSM900/1800/1900)
- Available Q3 2003



# Nokia equals Mobility





## Mobile enhancements

# Image Viewer

- View and share photos on TV from your compatible phone
- Easy, wireless image transfer over Bluetooth
- Single image and slideshow modes
- Light and portable
- Two alternative power sources: Nokia chargers or primary batteries
- Compatible e.g. with Nokia 3650 and Nokia 7650 phones



# Nokia 810 car phone

- Car phone for GSM 900/1800 networks
- Fast access to phone functions
- Large text for easy reading
- Speaker dependent voice dialing and voice commands
- Data transfer wirelessly using Bluetooth technology or via RS232 interface
- Personalisation for two users
- Available 3rd quarter 2003

Voice and data communication easy and comfortable in a vehicle environment

# Digital Pen

- Create, store and share personal and colorful messages
- Natural use of pen and paper
- Wireless connection to compatible phone using Bluetooth technology
- Send you personalised notes via MMS
- Store your notes in your PC
- Supports the use of open services provided by 3rd parties



A woman in a grey suit and high heels carries a red briefcase, walking alongside a man in a dark suit carrying a laptop. They are in a modern office building parking lot with a silver van and a tall skyscraper in the background. The scene is brightly lit with a blue sky and a yellow-to-blue gradient at the bottom.

Enterprise

# Nokia Opens up the Mobile E-mail World

- Nokia offers enterprise customers products with different sizes, feature sets and price points
- Mobilizing enterprise e-mail, calendar, and contacts
- Cooperation with leading IT vendors for end-to-end solutions
  - IBM
  - Oracle
  - Research in Motion
- Nokia e-mail solutions interoperate with Microsoft exchange server



# Nokia 6800 – optimized for messaging

”QWERTY into every pocket”





# Imaging

“We can’t predict how people’s behavior and life styles will change when everyone has a camera in their pocket and instant possibility to share the moment with others”



# Nokia 7650 – Icon product in the imaging market



Nokia 7650 was the best selling phone with a camera **AND** the best selling digital camera model in the world during Q4 2002

# Two distinctive camera phone categories

- Personal multimedia
  - Optimised for imaging
  - Larger form factor
  - Latest imaging features
  - Still, video & audio
  
- Camera phones
  - Small & lightweight
  - Smaller display
  - Less capable imaging features



# The Nokia 3650 is the best of breed in personal multimedia

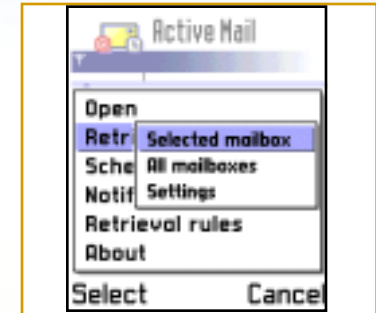
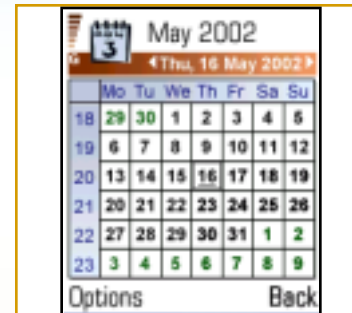


- Intuitive, easy to use graphical User Interface
- High quality VGA camera & display
- Large memory to store images and video
- More than 500 3rd party applications
- Video recorder & replay
- Real time streaming video & audio
- Full PIM (personal information management) functionality
- Synchronization with PC applications

# Nokia 3650 – richest set of smart phone features

## PIM (Personal information management)

- Synchronisation to PC
  - Calendar
  - Contacts
  - To do list
- Business & personal e-mail
- Hundreds of 3rd party applications



## Streaming

- Streaming with a Real One™ player
- Opens the door to rich, exciting audiovisual content
  - News
  - Sports
  - Music
- From the Nokia 3650 direct access to Real One™ portal



# Nokia is in a leading position in the emerging 3G WCDMA – Nokia 6650

- World's first dual mode GSM/WCDMA phone
- Video with voice and still images
- Data transmission speed 384 kbs
- Based on Nokia's own leading WCDMA/GSM chipset
- Available in H1 2003

10 000 Nokia 6650s shipped for operator network optimization and live trials

# Conclusions

# Icons of New Mobility

## Entertainment

Nokia 3300 Nokia  
N-Gage



## Imaging

Nokia 3650  
Nokia 7650



## Enterprise

Nokia 6800  
Nokia 9210



# Nokia Mobile Phones' Strategic Intent

Enrich people's lives with  
branded mobility solutions

In 2003 we'll experience the beginning of new Mobility...

**NOKIA**

CONNECTING PEOPLE