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Overall Highlights

- Entertainment is a key focus area for Services & Software
- 2008: a very productive year
 - Roll out of Nokia Music Stores across 3 continents
 - Locally relevant content, not just international hits
 - Launch of Comes With Music in the UK
 - Innovative business model to labels and compelling value proposition to consumers
 - Launch of new N-Gage service, new device support and dozens of games
 - Innovation – Reset Generation (cross-platform) and Dance Fabulous (cross-service)
 - Pre-installed content – revenue opportunity
 - N96 and Transformers/Batman
 - N85 and games
- Coming soon
 - Announced in August that we are streamlining various services such as MOSH, WidSets and Download! into a single service
 - This will provide an easy way for consumers to get mobile media for their device
 - Core part of our People and Places strategy

Music

- Offering a total music experience – on PC, on devices and services
- Nokia Music for PC
 - Easiest way to get music onto your Nokia and manage your music collection
 - Rip CDs DIRECTLY to your mobile – no other software enables that
 - Easy transfer by dragging and dropping albums or songs onto the picture of your device
 - Transfer playlists from your device to your computer – also unique
 - In markets that have a Nokia Music Store, access the store directly from the Store tab

- Aggressive Nokia Music Store roll out
 - 12 markets in 13 months across 3 continents
 - Continue roll out during 2009 including the US and our first stores in Africa (South Africa) and South America (Brazil)
 - Focus on locally relevant content, not just international hits
- Interesting trends from Nokia Music Store highlighting value of mobility
 - About 35% of visitors to our music stores are via mobile
 - About a third of downloads are happening over the air, either via 3G or wifi
- Comes With Music
 - Very simple proposition – buy a Nokia Comes With Music device and get a year's worth of unlimited access to the Nokia Music Store. Keep all of the music you download
 - Strong support from the industry – all major labels on board as well as indies and music publishers
 - Offer 100 percent chart coverage in the UK at sales start
 - Nokia 5310 XpressMusic and Nokia N95 8GB now on sale – compelling price points (GBP 129.99 and free on a GBP35/month contract)
 - 18-month contract option to support operators (e.g. 3UK)
 - Expanding device support with additional devices in 2009 – major focus on Nokia 5800 XpressMusic
 - Roll out in 2009 across markets with existing Nokia Music Store
 - Nokia makes money both from traditional device margins, as well as margins on the Comes With Music service
 - Positive business for all players – Nokia, labels, rightsholders

Games

- N-Gage highlights
 - Live in April and regularly introducing more and more N-Gage-compatible devices to the market (already Nokia N79, N81, N82, N85, N95, N96, Nokia 5320 XpressMusic)
 - Pre-loaded games. For example, Nokia N85 comes with at least 10 games in box
 - Co-operation with Vodafone with Nokia N85 bundled with a customized version of the N-Gage application with the Star Wars: The Force Unleashed game embedded as well as exclusive mobile content
 - Co-operation with Rogers (Canada) around N-Gage
- Trends from the first six months:
 - Sales transactions in over 130 countries
 - Repeat purchase rate is over 35% globally
 - Operator billing is dominant with over 80% of people using it in countries where available

- Other milestones
 - Chinese language N-Gage application and the ability to pay with QQCoin (the leading virtual currency in China) later this year
 - 1Q 2009 – 15 to 20k retail purchase points in India and well as operator billing in Latin America and a localized service and operator billing in Russia
- New titles on a regular basis with a mix of genres
 - Play and compete with others: ONE and Dirk Dagger
 - Interact and communicate with others: Reset Generation and Yamake
 - Casual gamers: Bounce and Hooked On: Creatures of the Deep
 - Big brands: EA Sports, Gameloft, etc.
- Game innovation
 - Cross-platform games - web-to-web, web-to-PC/console and web-to-mobile
 - Reset Generation available to play for free on PC (Windows/Mac/Linux) as an embedded web widget and as downloadable content with all N-Gage compatible devices.
 - Games across Nokia service offerings
 - Dance Fabulous dance and music game. Create unique choreographies to the music stored on your device, including a link to the Nokia Music Store
 - Expect to see more integration of services in N-Gage games – for example using Nokia Maps and GPS
- N-Gage Arena
 - the place where the N-Gage community goes to meet friends and find others to play with
 - Online multiplayer gaming is at the core of the N-Gage experience
 - All titles support a common minimum community feature set, but more multiplayer games and more community features coming
 - Nokia has the leading, tried and tested solution for creating the best online multiplayer mobile games

Summary

- Music and Gaming focus for 2009
 - Rolling out NMS/CWM in key markets
 - Expanding N-Gage portfolio in terms of games and devices
- Nokia strengths
 - Tight integration between experience and device
 - Innovative business models that bring value to all
 - Device volumes