



# Consumer Business Unit

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belgacom



- **Vision**

- **Challenges & Strategy**

- **Customers**

- **Market**

- **Products & Services**

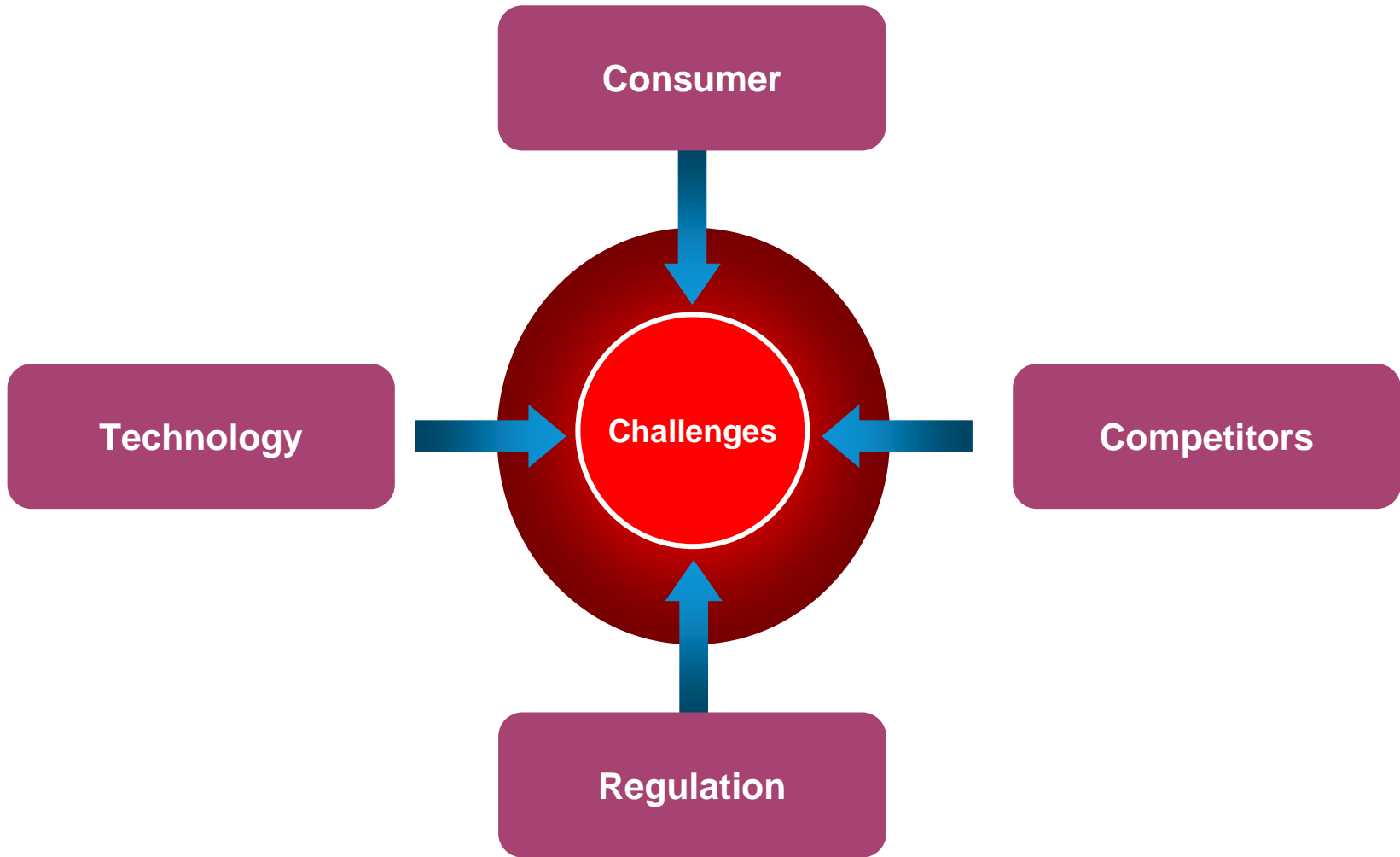
belgacom

# Vision: Feel home wherever you are



# The Consumer environment is changing

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# Consumer Business Unit Strategy

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**Deliver superior  
end-to-end customer experience**

Optimize customer reach

Differentiated  
Products &  
Solutions

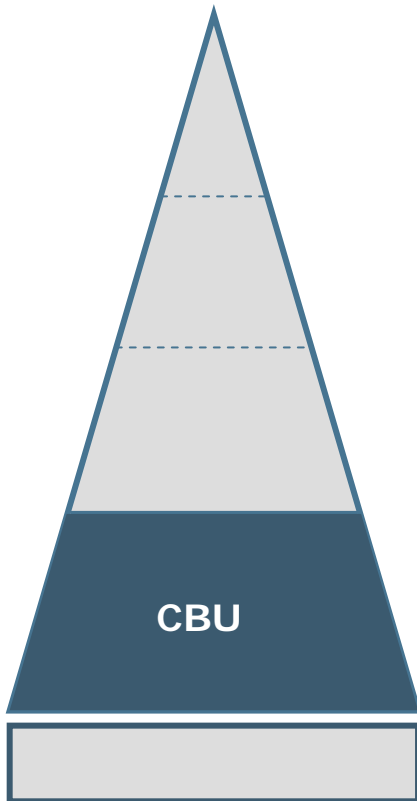
Drive multiplay via  
segmented  
propositions

Leading Brand  
perception

Fixed Mobile Convergence

# Consumer Business Unit

Belgacom  
segment



Belgian market

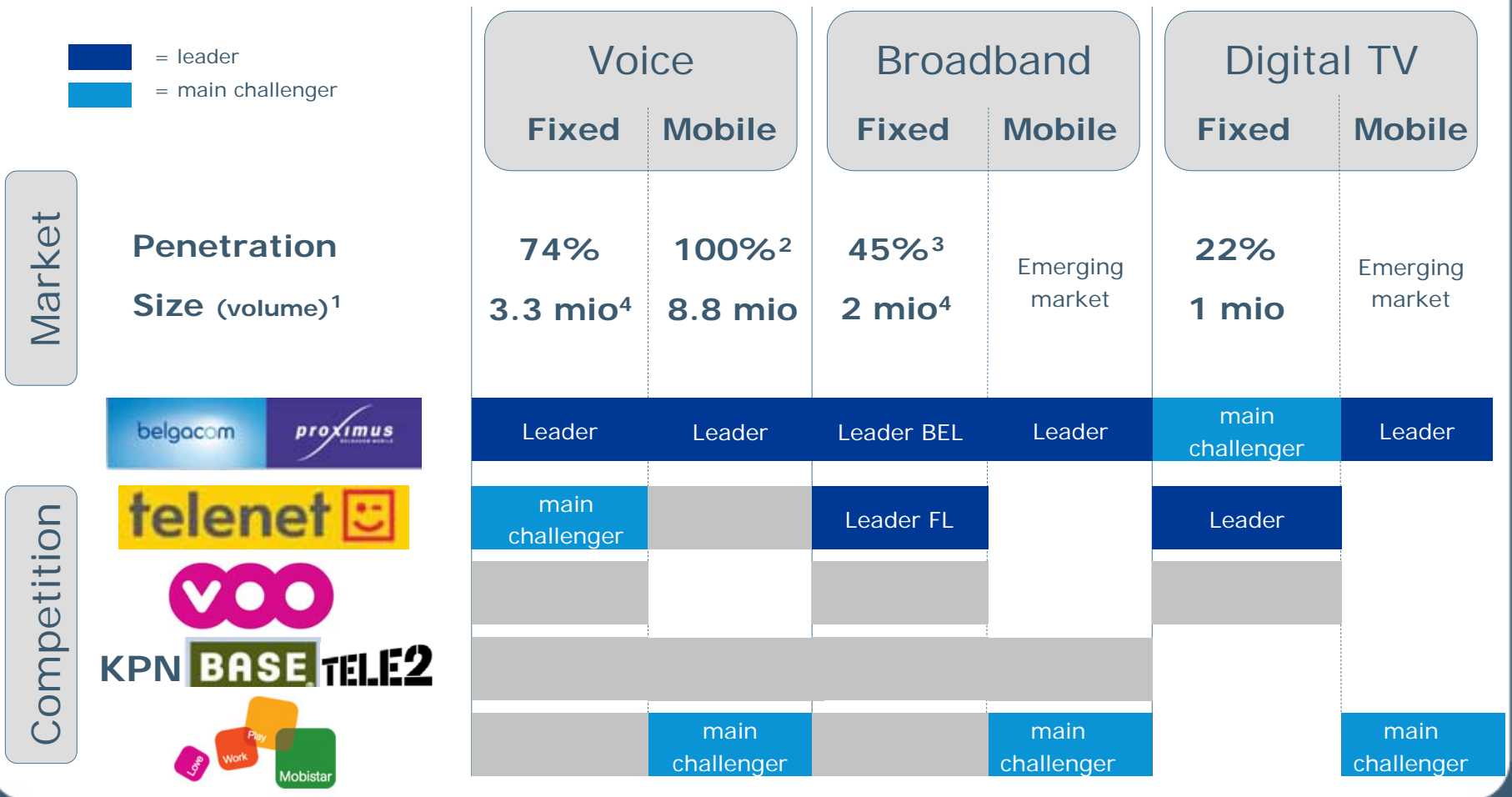
4.5 mio households  
10.6 mio inhabitants

CBU customers – FY 2007

- **3.582k mobile customers**  
Mobile ARPU: 25.2 EUR
- **2.322 voice access lines**  
Voice ARPU: 22.0 EUR
- **817k DSL internet customers**  
DSL ARPU: 30.6 EUR
- **305k digital TV customers**  
DTV ARPU: 16.1 EUR
- **153k Packs customers**

# Consumer Competitive landscape

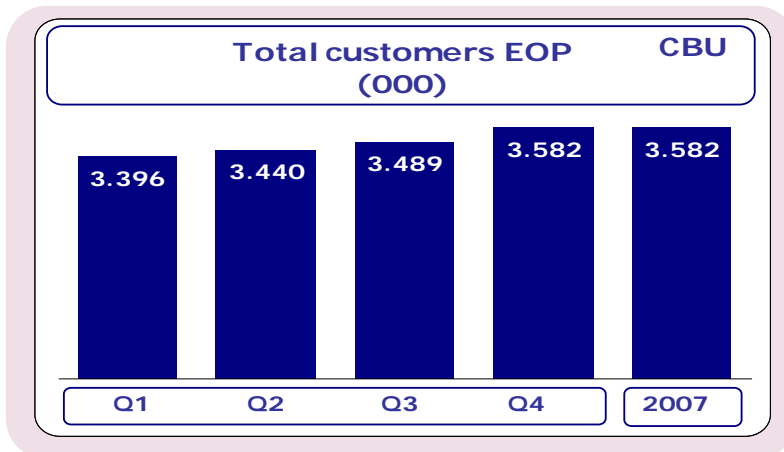
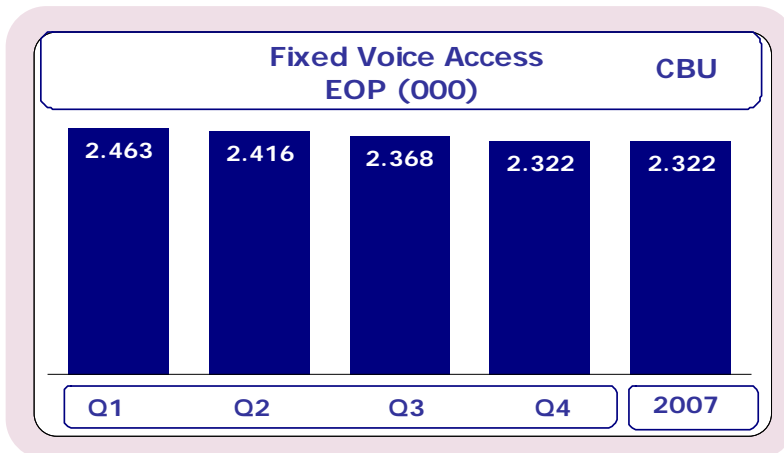
*Belgacom only player to offer all 6-play components in Belgium*



<sup>1</sup> Based on official where available and company research/estimates  
<sup>2</sup> Total penetration rate active cards (incl Enterprise) on population  
<sup>3</sup> Consumer broadband connections ISPA on households  
<sup>4</sup> Includes market SOHO customers, not pure Consumer

# Voice

## CBU Results 2007



## Fixed Voice

### Market & Competition

- Limited decrease of voice access penetration
- Flat rate formula's extended to international calls

### Key challenges 2008

- Limit erosion of Fixed voice revenues
- Further deployment of VoIP offer

## Mobile Voice

### Market & Competition

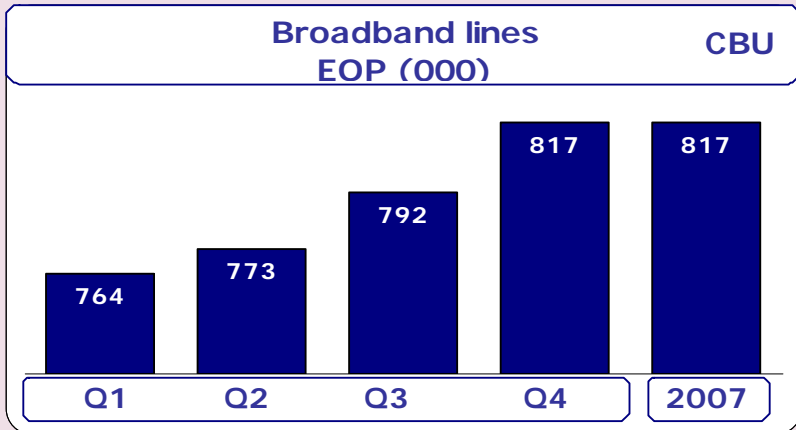
- Belgacom CBU consolidated leader position due to strong net adds in 2007
- Lots of niche players on MVNO market

### Key challenges 2008

- Sustain growth and maintain high retention rate of mobile customers

# Broadband

## CBU Results 2007



## Fixed Broadband

### Market & Competition

- Market growth deceleration
- Low-end entry offers and broadband in Packs drive growth
- VOO consolidated in South

### Key challenges 2008

- Continue to generate broadband customer growth

## Mobile Data

### Market & Competition

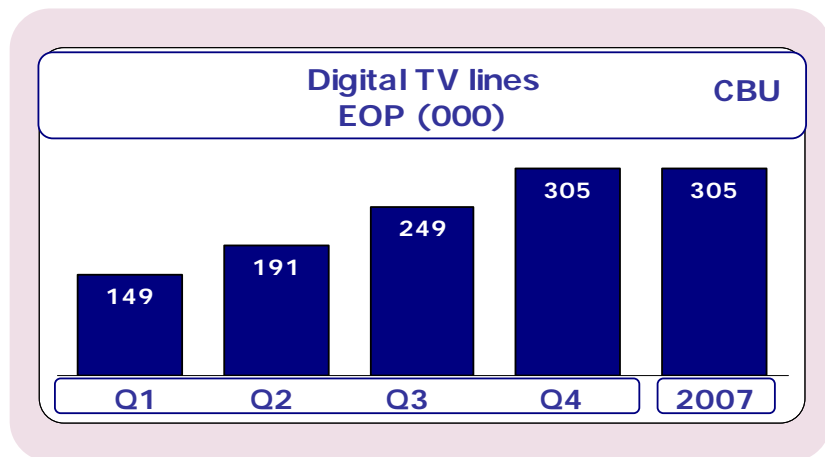
- Different formula's on market: Proximus Mobile Internet, Mobistar Internet Everywhere,...

### Key challenges 2008

- Grow mobile data as complementary solution to fixed broadband

# Digital TV

## CBU Results 2007



## Fixed Digital TV

### Market & Competition

- Strong digital TV market growth in 2007
- First decrease of cable connections since 16 years
- Belgacom clear nr 2 on Belgian DTV market
- Advanced interactive services only at Belgacom and Telenet

### Key Challenges 2008

- Sustain high growth of Belgacom TV subscribers
- Differentiate on innovative product features, packaging and content
- Increase ARPU (VoD)
- Continue to improve customer experience

## Mobile TV

### Market & Competition

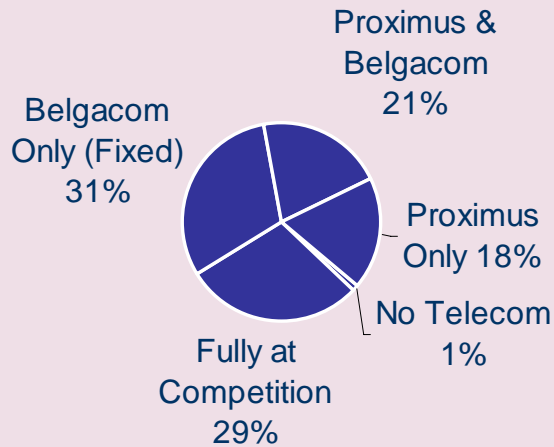
- Belgacom and Mobistar pushing new offers in this emerging market

### Key challenges 2008

- Prepare take-off of mobile TV

# Multiplay

## CBU Consumer Market shares



## Multiplay

### Market & Competition

- Traditional telecom and cable market players acquire and retain customers through bundled offers
- Further market evolution towards multiplay offers. Belgacom only player to be able to propose 6-play offer nationwide: voice, internet and TV on both mobile and fixed networks

### Key Challenges 2008

- Drive convergence of services, beyond packs
- Leverage cross and up-selling opportunities

**Together!**



**belgacom**