



kpn



Key figures 2008



Total revenues

14.6 billion

Operating profit

2.6 billion

Results after taxes

1.3 billion

Staff

36.702 fte

25.073 fte excl. Getronics



Customer numbers (x 1.000)

Business market

Wireless	1.487
Fixed lines	1.581

Consumer market

Wireless	6.248
Fixed lines	3.444
Internet (ISP)	2.536
TV	775

Mainly broadcast DTT

KPN International

E-Plus	17.777
BASE	3.445

HBB?

- Hybrid as in
 - Leveling different bearers for optimal service delivery at lowest cost?
 - Network offload
 - Wholesale the best return channel for broadcast service offerings?
 - High quality CDN infrastructure
 - Delivering white labeled a interactive service complementing a broadcast service?
 - High quality CDN plus encryption, subscription
 - Synchronizing interactive services that are part of a broadcast delivery?
 - Voting, subtitling certain language, multiple commentators at one life broadcast.
 - Don't understand we do... Fiber Fiber Fiber..
 - Fiber is the future, all will be fiber, single service, what is the problem...

KPN is relatively new in "TV" but experiences in previous changes



What is TV for the customer ?

Yesterday.....Tomorrow.....Future
 Tv as iconic user interface Media on a new interface?

70 % interactive 30 % lean back



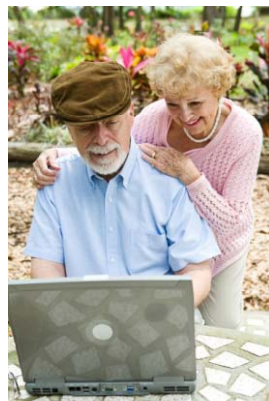
TV Channel packages



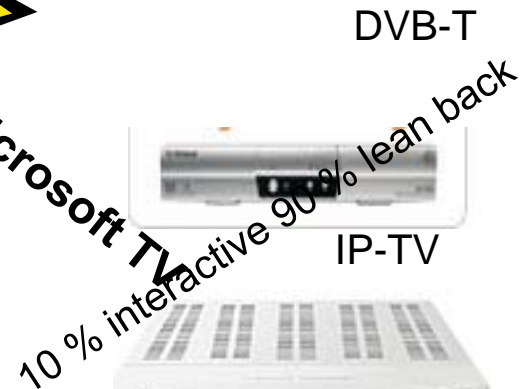
Digital video recorder

Missed programs

Video on demand



50 % interactive 50 % lean back

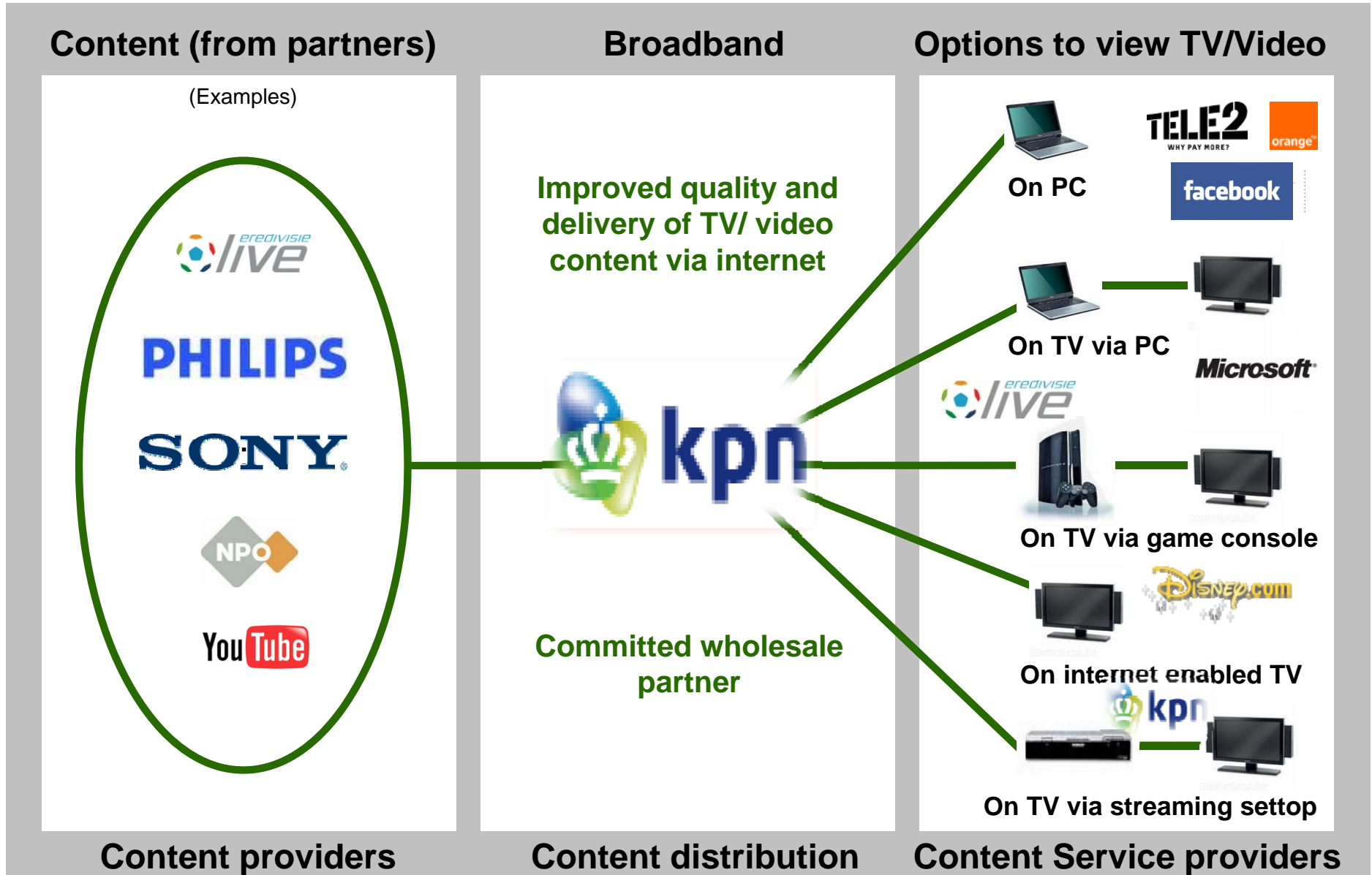


10 % interactive 90 % lean back

Technology enables
User interface sells

Operator perspective 1

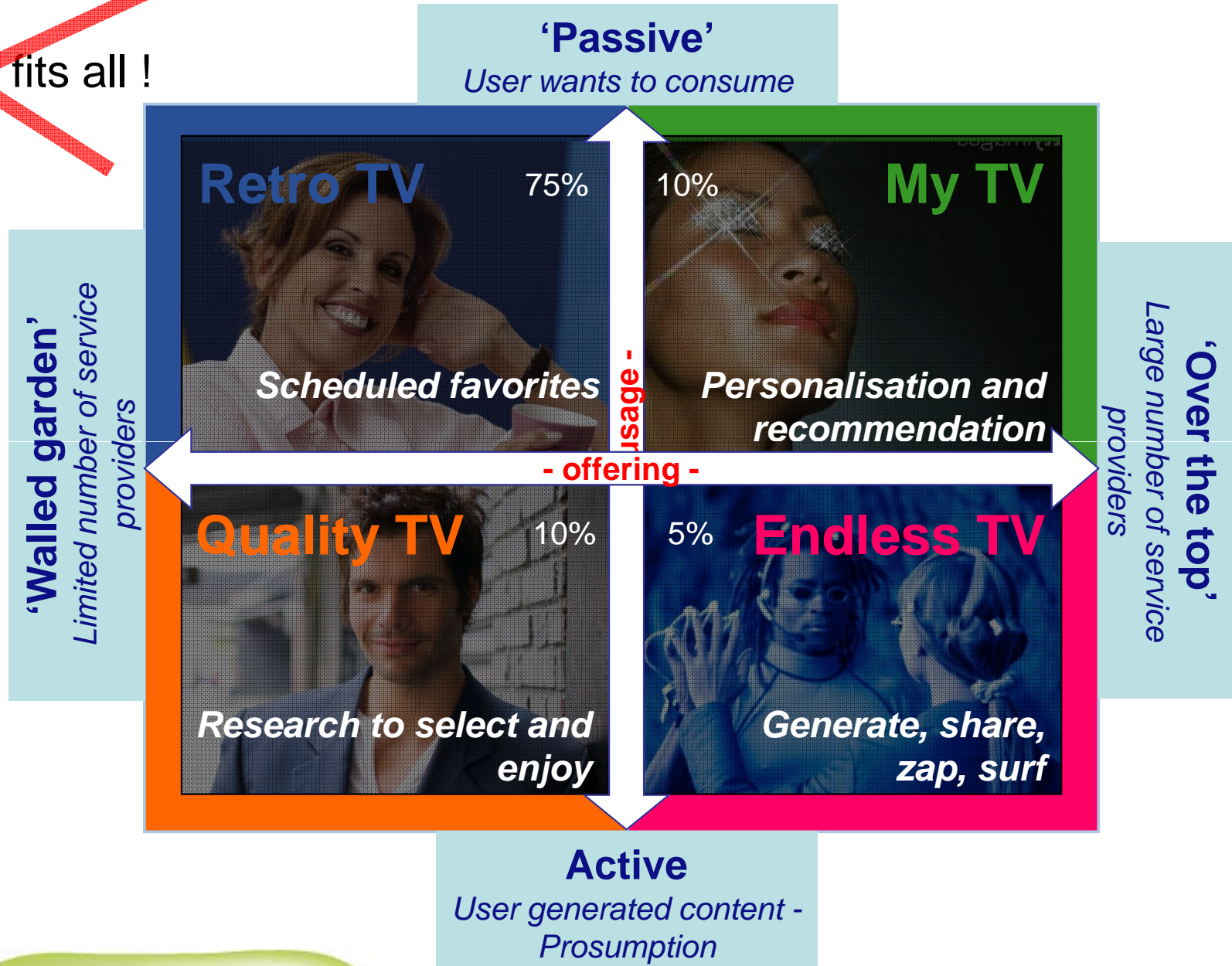
Content can be watched on all kinds of internet/ IP streaming enabled devices



Operator perspective 2

Changing consumer segmentation and trends

~~One size fits all !~~



Business role discussion: Which role to play, What to do, what's in it for me?

