

# Situatie elektronische communicatiesector 2016



# Transparantie, switching en toegang



## Transparantie

Tariefsimulator, Atlas,  
kwaliteitsbarometer,  
statistieken



## Switching

Easy switch



## Toegang

Marktanalyse



# Verhoogde transparantie van prijs en kwaliteit



**Prijsvergelijking**

Tariefsimulator



**Netwerkdekking**

Atlas dekkingsmap



**Dienstkwaliteit**

Kwaliteitsbarometer

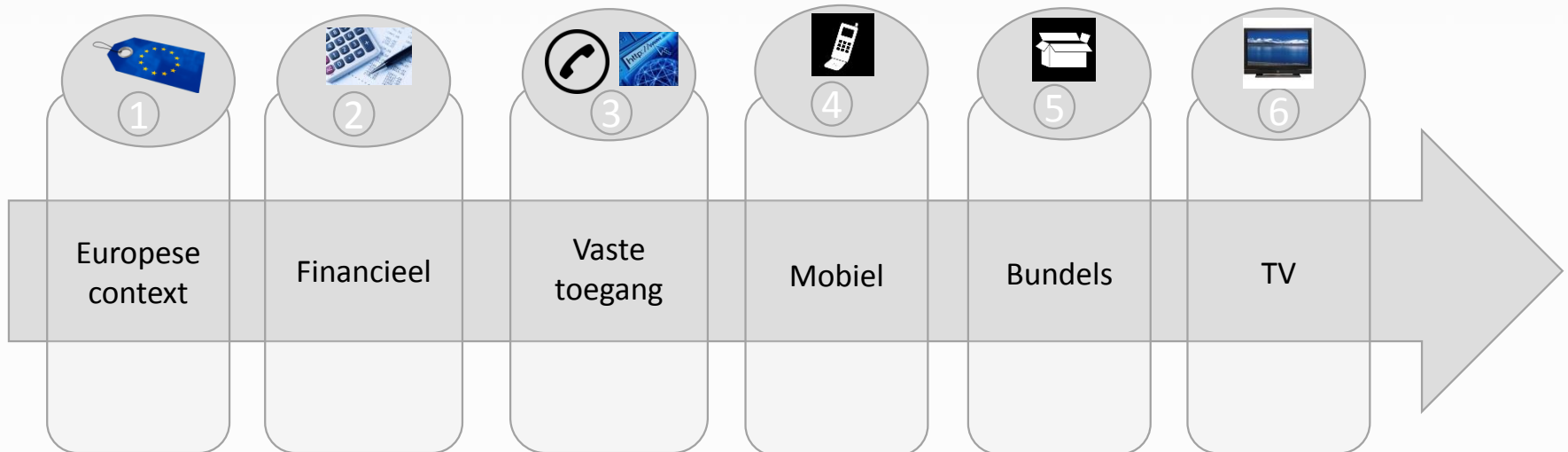


**Statistieken**

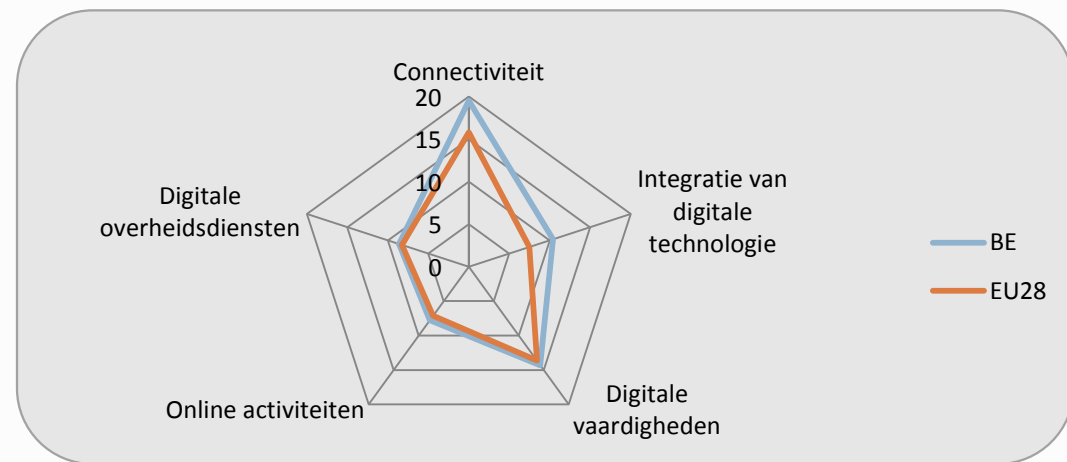
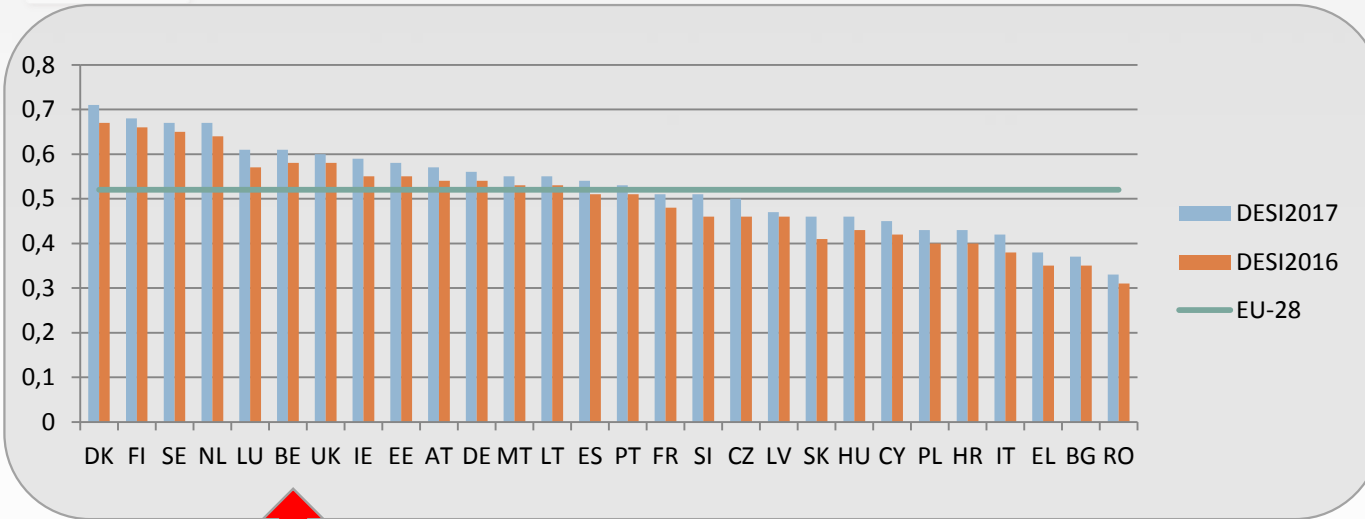
Economisch rapport



# Agenda

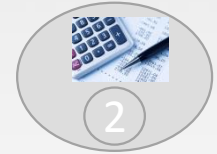


# Europese context



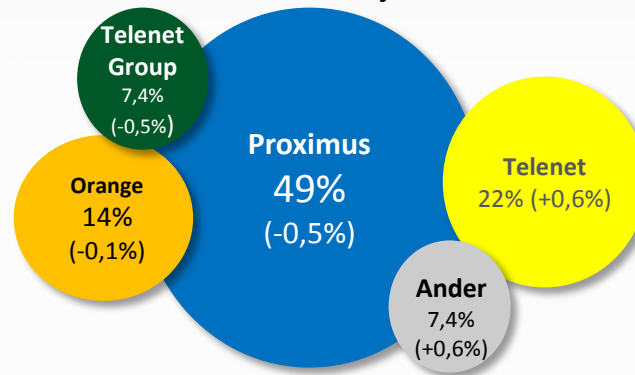
Verbetering totale score ( 0,58 naar 0,61 ) en score individuele dimensies. Prestaties van België liggen boven EU-gemiddelde. Beste positie voor connectiviteit ondanks verlies van 1 plaats ( van 2<sup>de</sup> naar 3<sup>de</sup> positie )

# Financieel



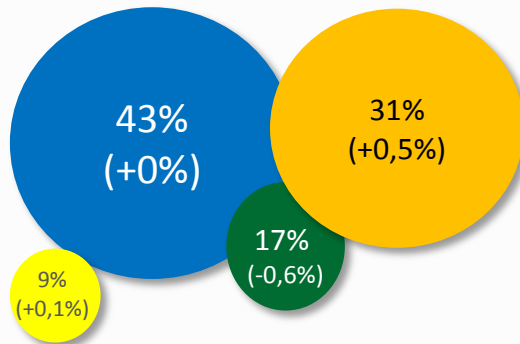
## Totale communicatiemarkt 2016

€ 8.416 miljoen\*



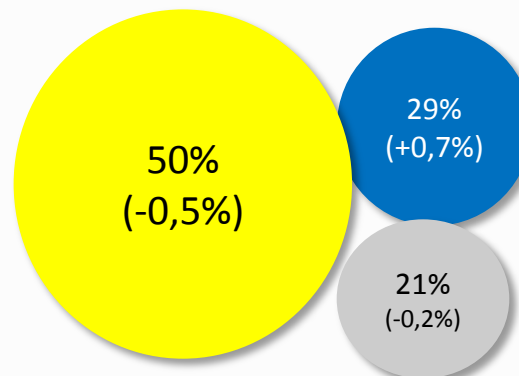
### Mobiel

€ 3.673 miljoen



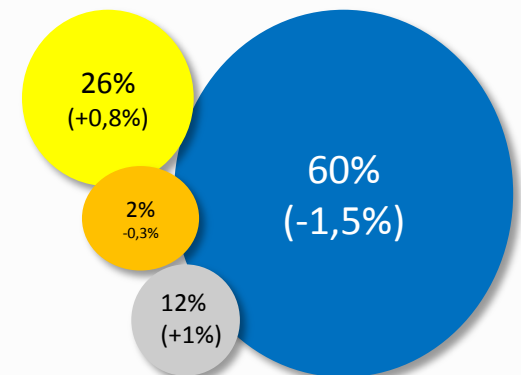
### TV

€ 1.171 miljoen



### Vast (data & telefonie)

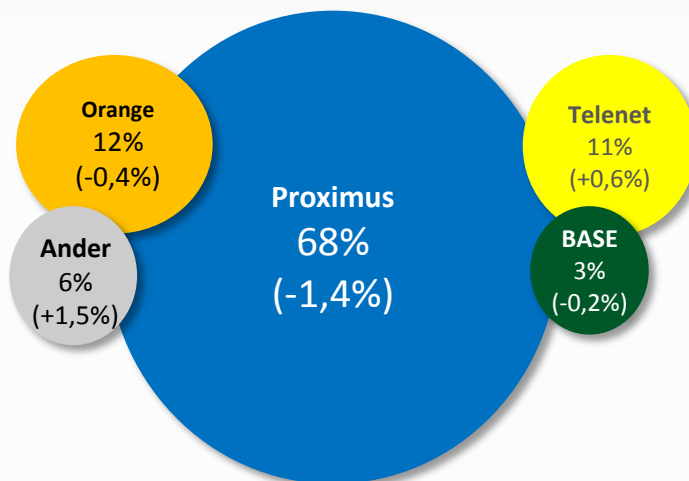
€ 3.543 miljoen



# Financieel : bedrijvenmarkt

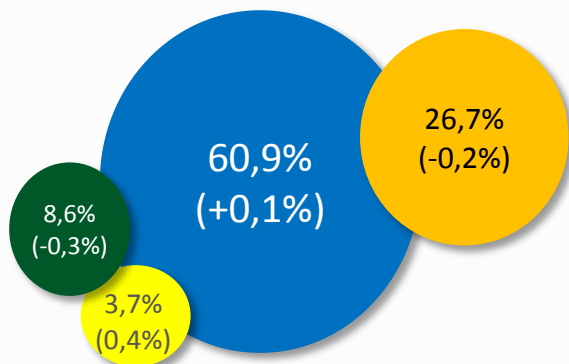
## Totale markt – 2016 (2015)

€2.398 miljoen



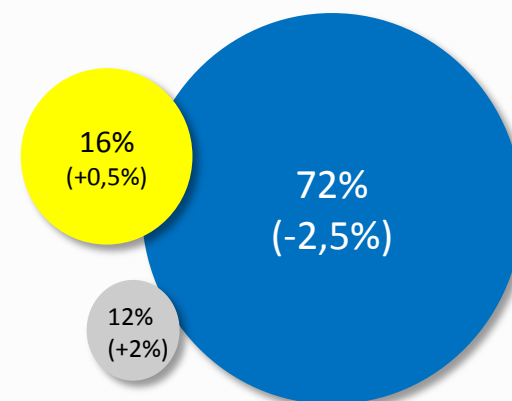
## Mobiel

€ 943 miljoen

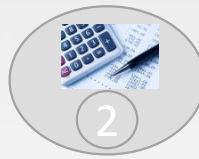


## Vast (data & telephonie)

€ 2.365 miljoen



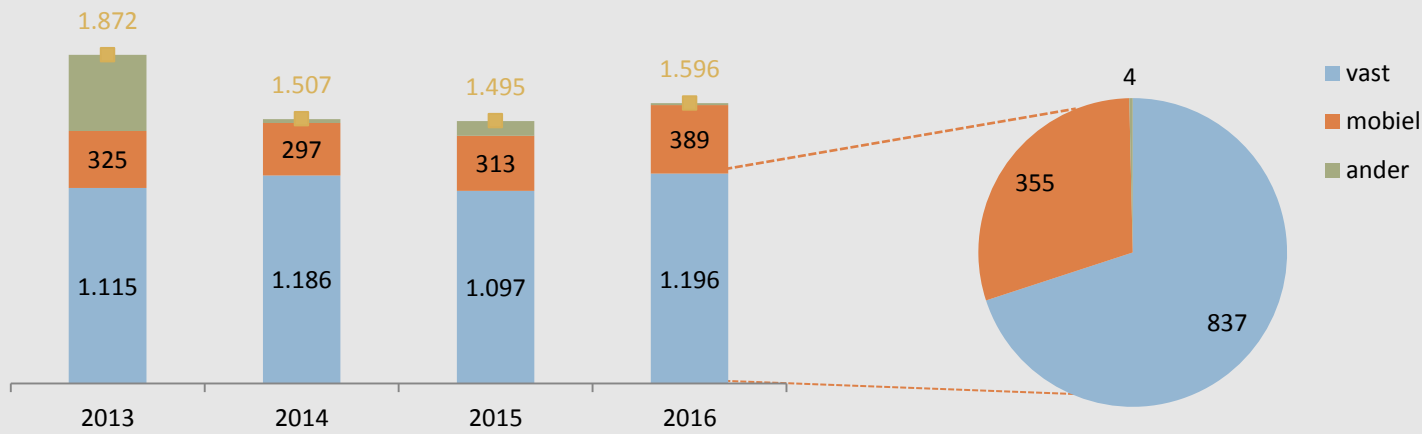
# Financieel : investeringen



Vaste activa/telecomomzet ratio  
(excl licenties)

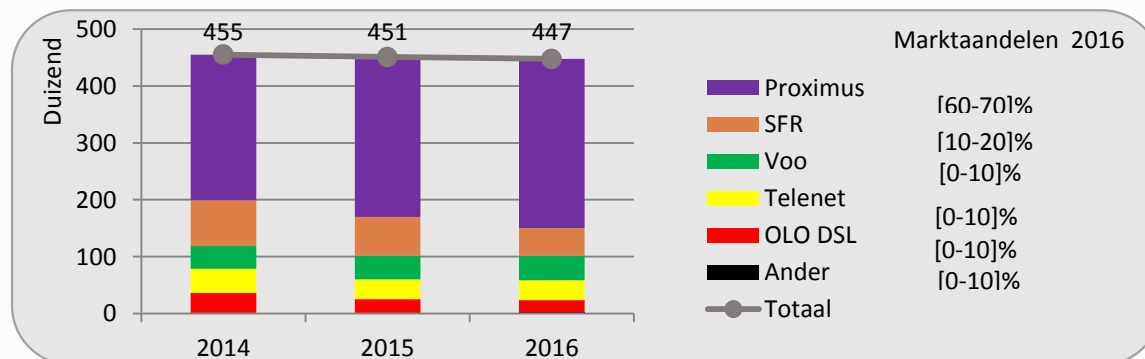
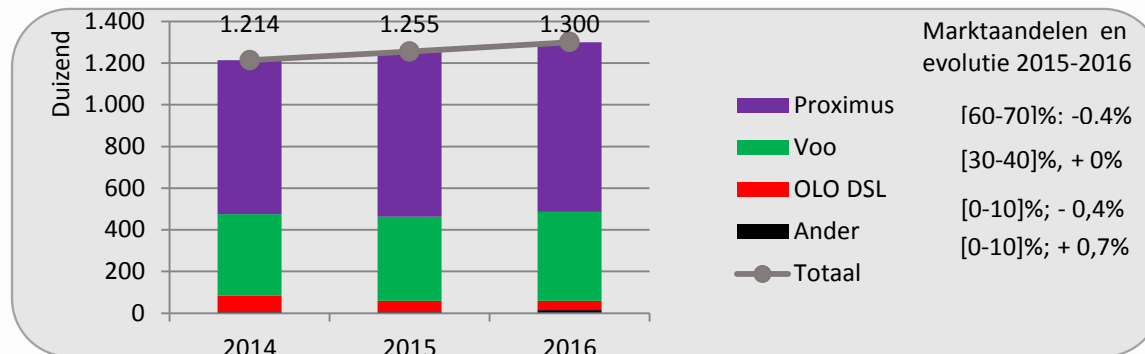
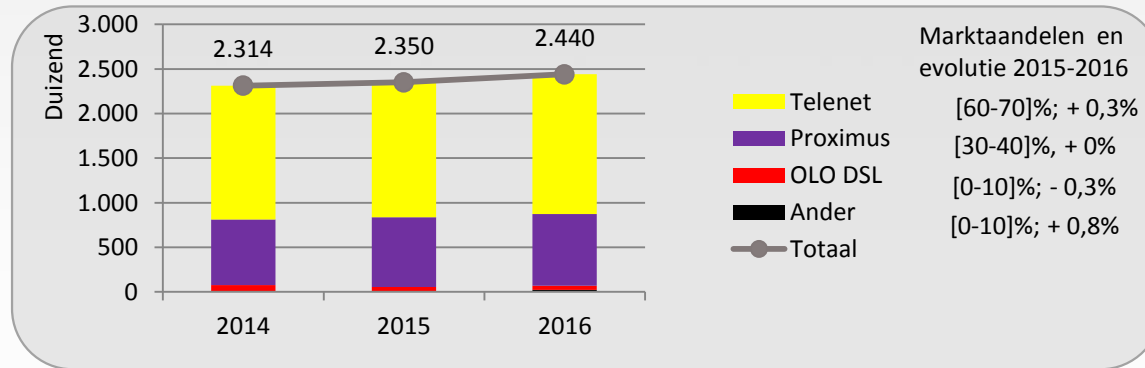
19,7%                      21,1%                      19,6%                      21,9%

Miljoen euro



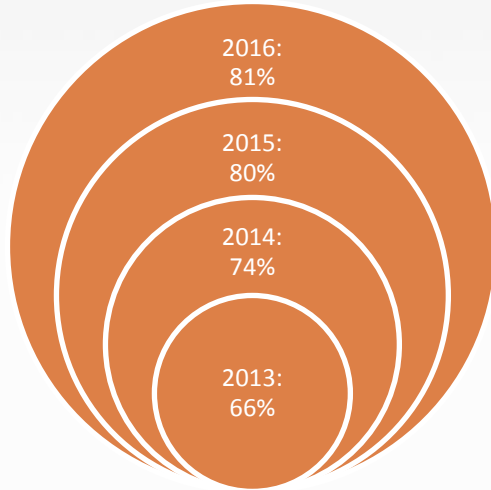
■ Materiële vaste activa   ■ Immateriële vaste activa   ■ Licenties   ■ Totaal

# Vast breedband

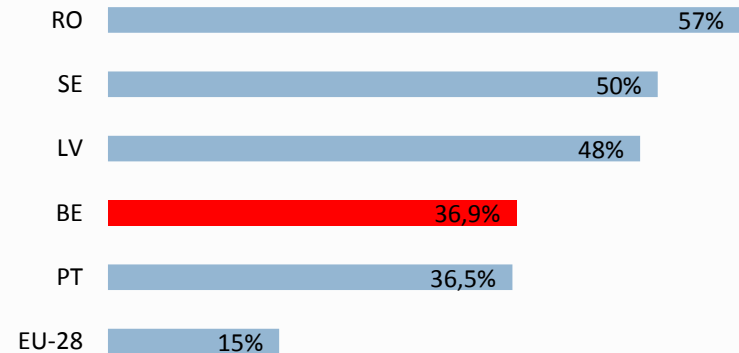
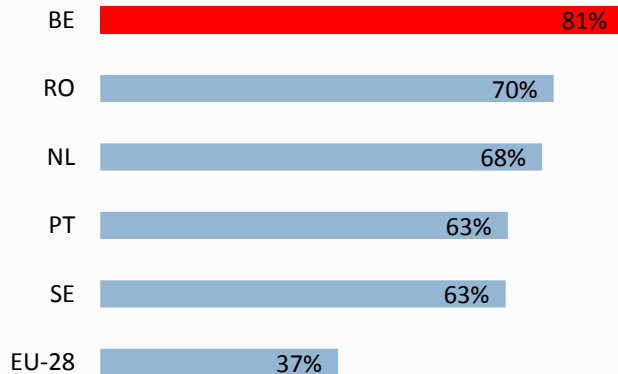
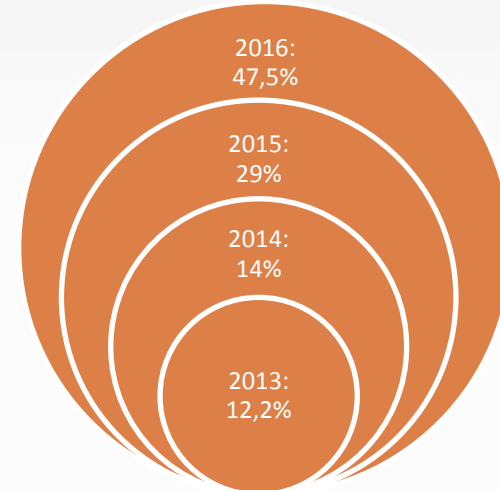


# Vast breedband

% BB lijnen  $\geq 30$  Mbit/s



% BB lijnen  $\geq 100$  Mbit/s

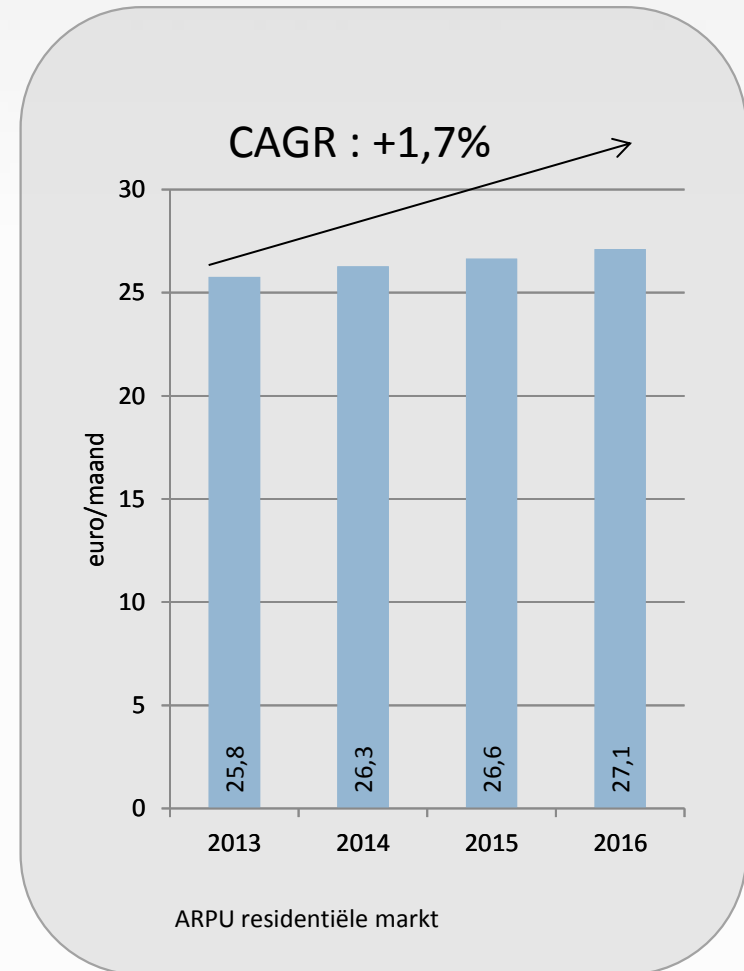
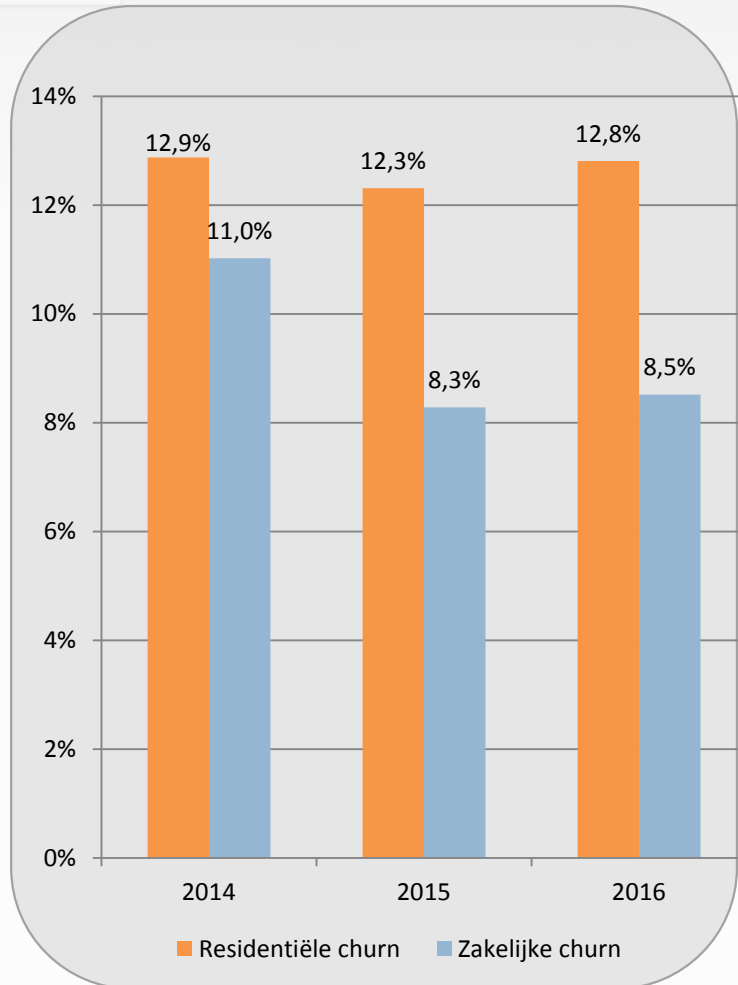


Juli 2016

Consolidatie koppositie  $\geq 30$  Mbps

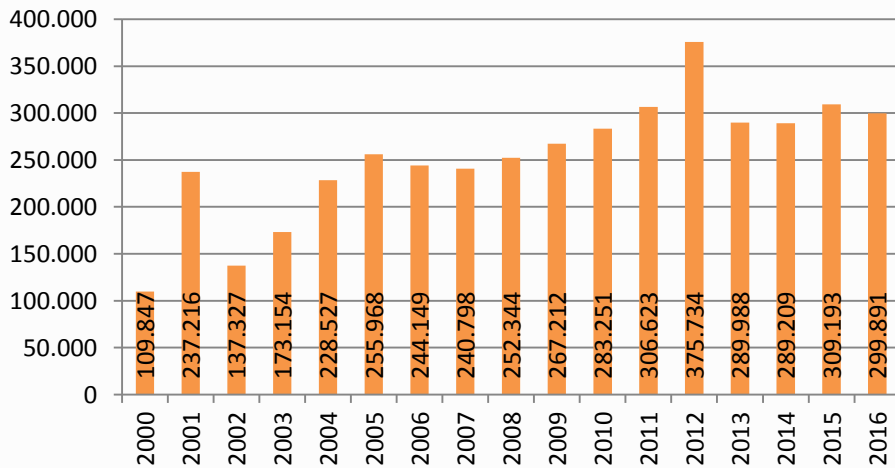
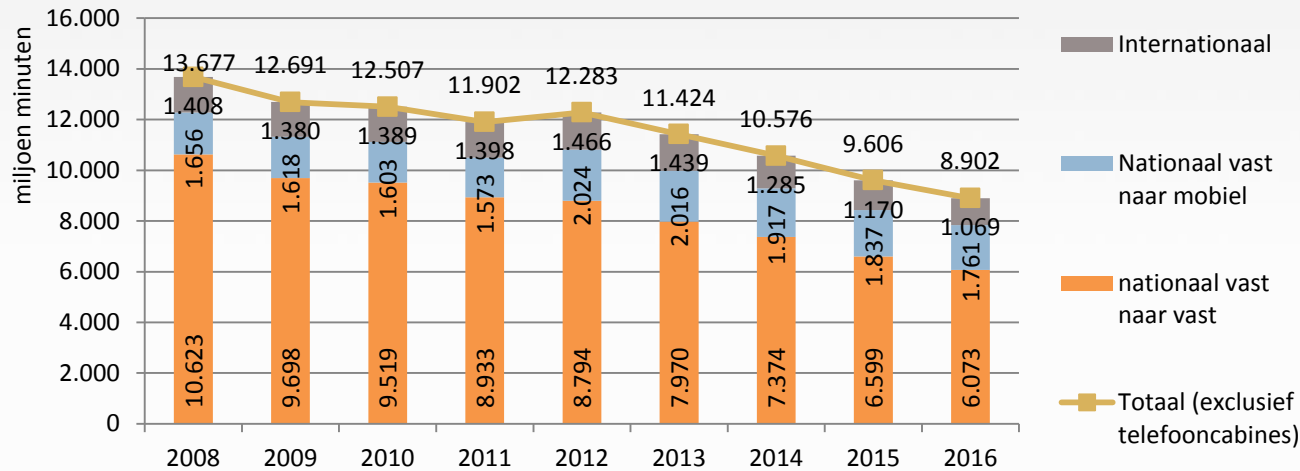
70% groei in opname van  $\geq 100$  Mbps lijnen leidt tot penetratiegroei van 26 naar 43% van de Belgische huishoudens

# Vast breedband

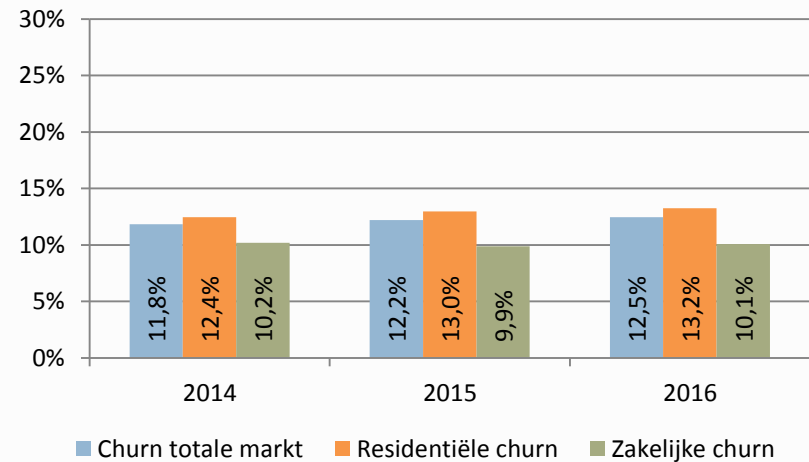


De residentiële vaste breedbandklant verandert meer van operator en genereert gemiddeld meer omzet ( +1,8% op jaarbasis )

# Vaste telefonie

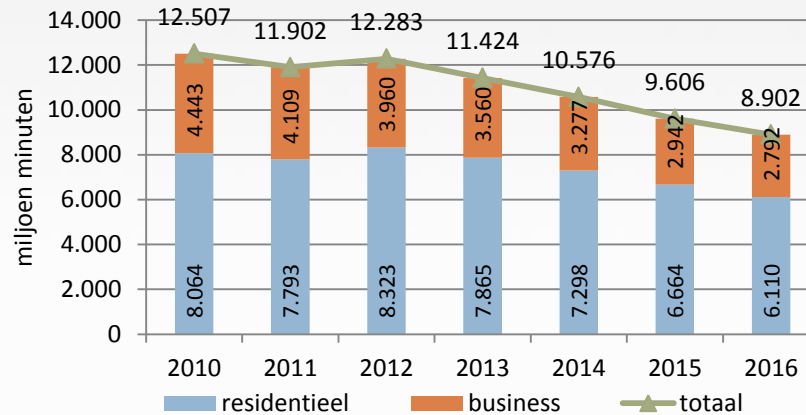


Geporteerde nummers tijdens periode

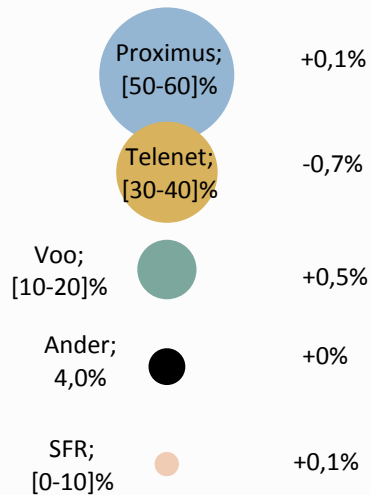


Vaste lijn wordt minder gebruikt voor het maken van klassieke spraakoproepen (-7,2%). Minder vaste porteringen (gemiddeld -5,5% vanaf 2012) maar churnrate verhoogt.

# Vaste telefonie

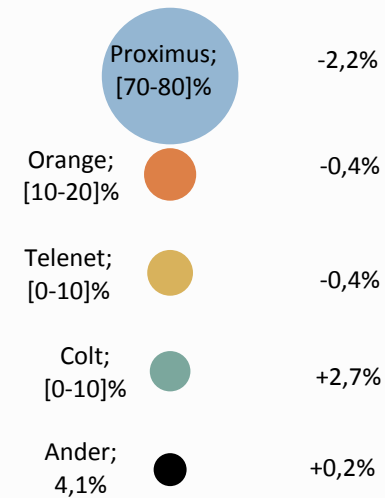


## Residentieel (volume)



Evolutie 2015-2016

## Zakelijk (volume)



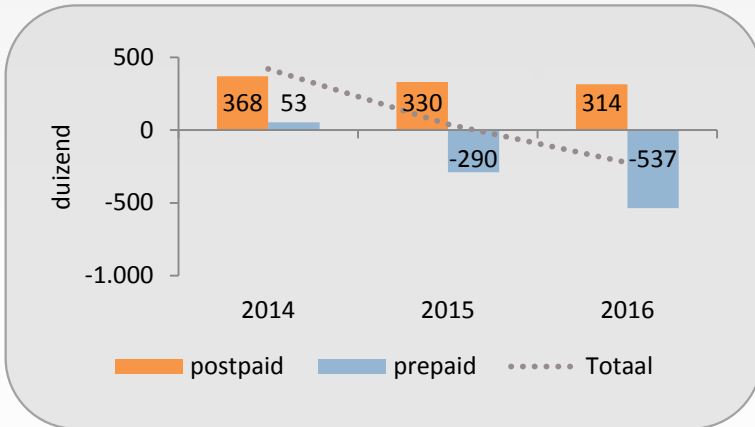
Evolutie 2015-2016

Over 2010-2016 is de gemiddelde jaarlijkse volumedaling groter op de zakelijke markt (-7,2%) dan op de residentiële markt (-4,9%)

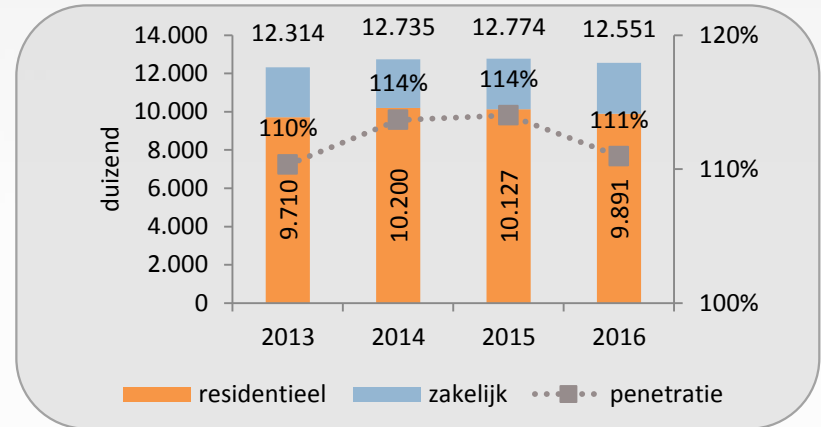
# Mobiel (excl m2m)



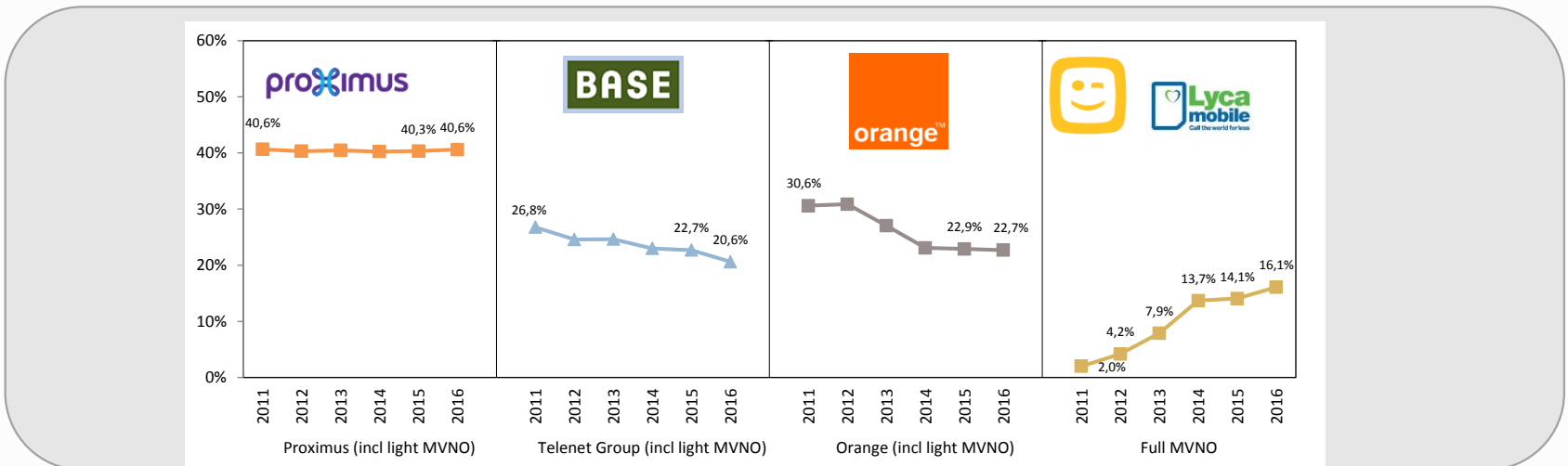
Netto-toevoegingen



Actieve simkaarten

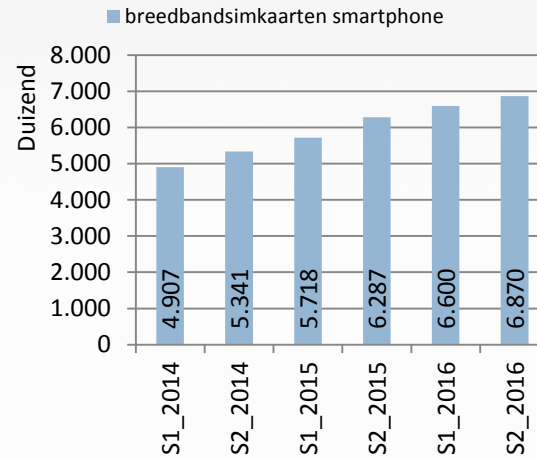
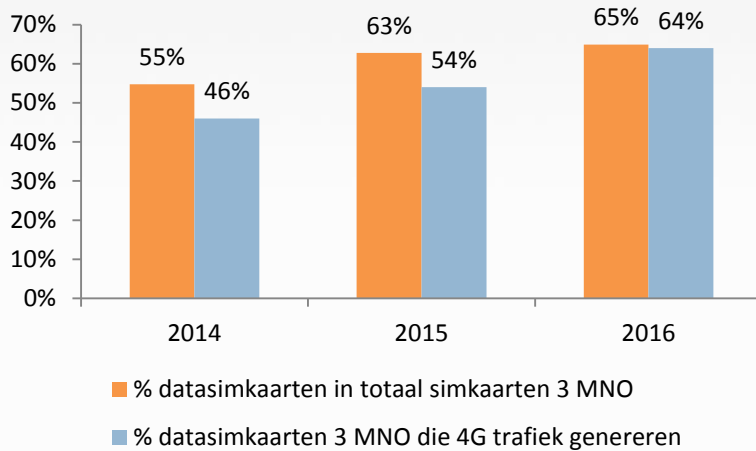


Marktaandelen (excl m2m)



Structurele afname prepaid leidt tot daling actieve simkaarten -1,7%. Verlies is beperkt tot de residentiële markt (-2,3%).  
 Full MVNO klimmen naar marktaandeel van 16,1%.  
 M2m boomt : +39,7% tot meer dan 2 miljoen simkaarten.

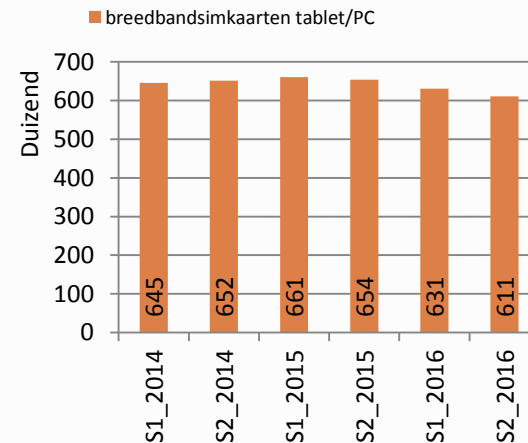
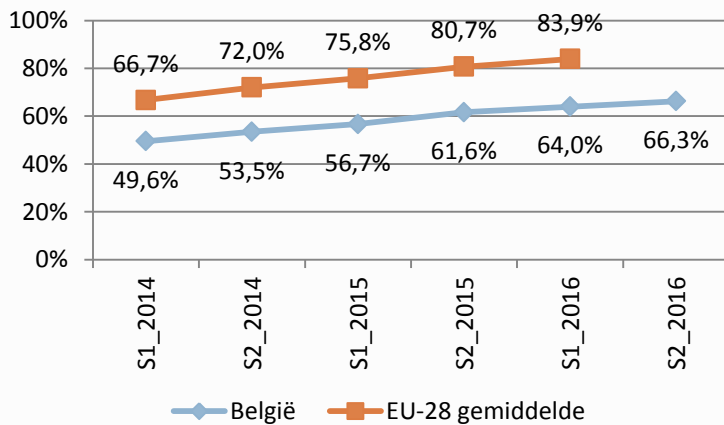
# Mobiel : data



+9,3%

Evolutie 2015-2016

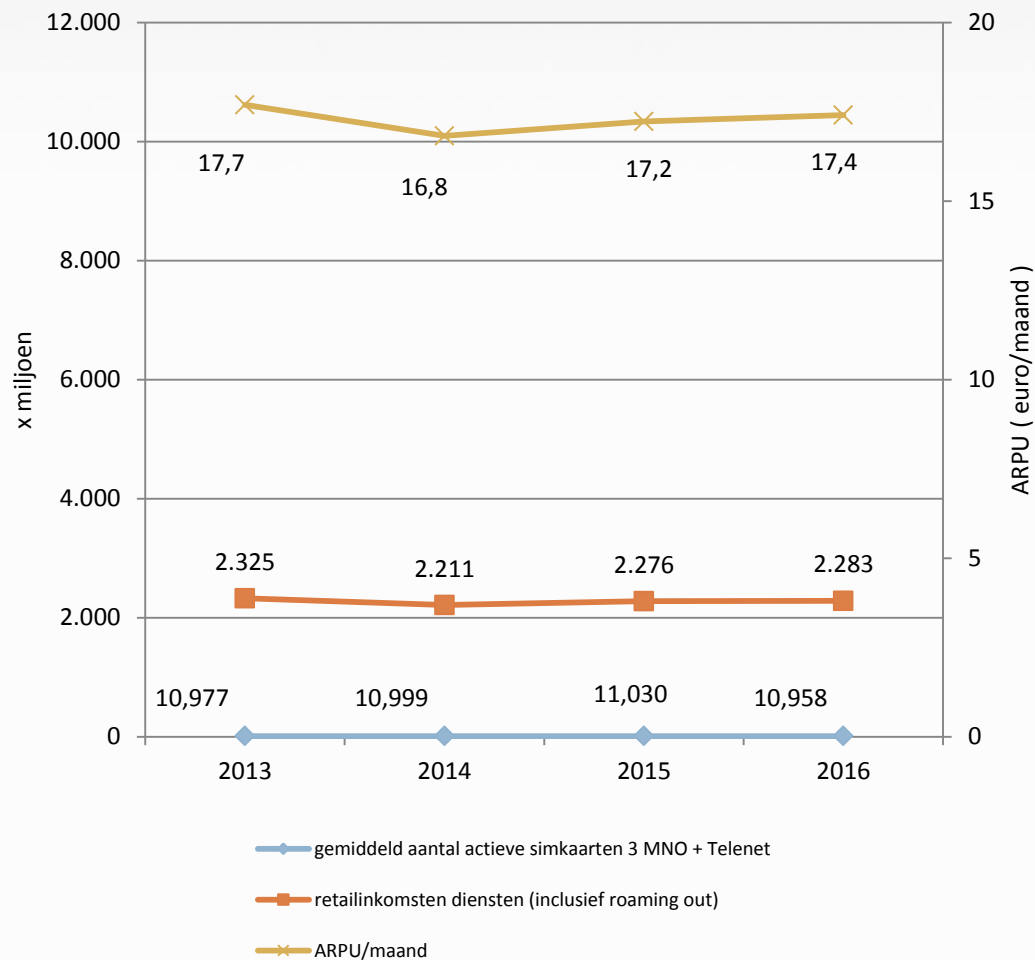
## Penetratie (bevolking)



-12,7%

Evolutie 2015-2016

# Mobiel : omzet



Retail ARPU per actieve simkaart verhoogt met 20 eurocent per maand tot 17,4 euro.

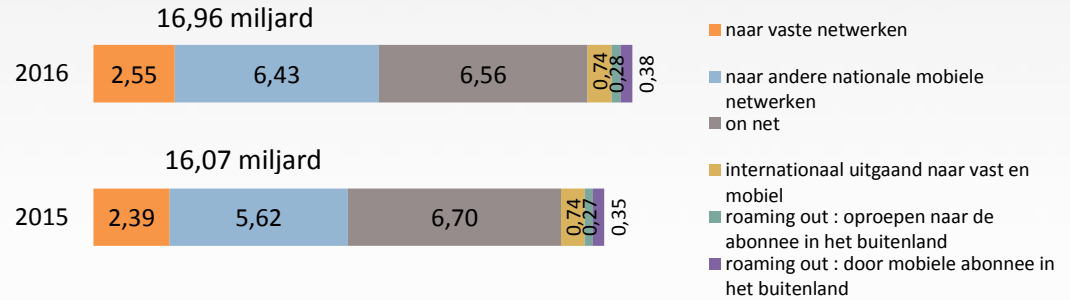
# Mobiel : spraak



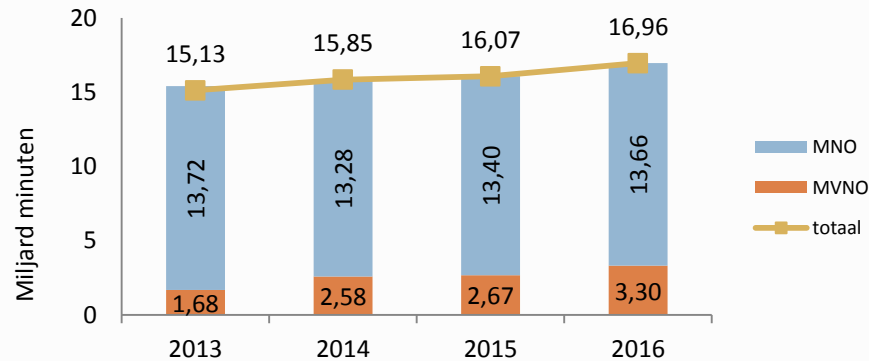
Minuten



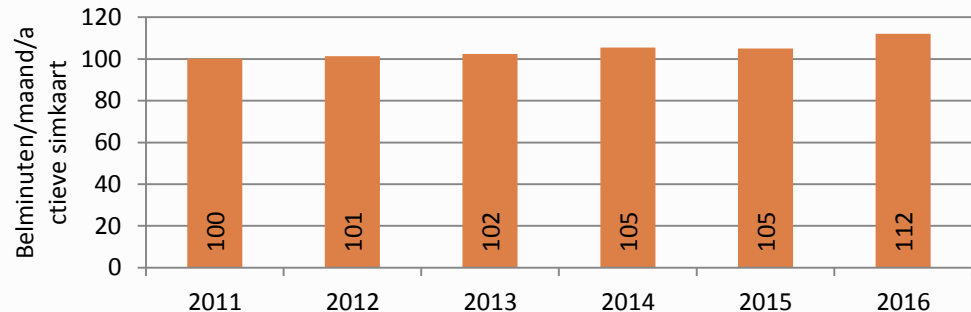
+5,5%



MVNO :  
19,1%



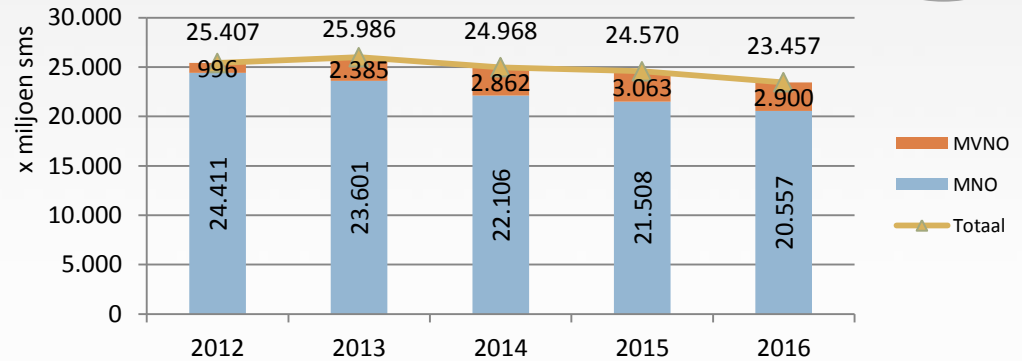
Gemiddeld  
gebruik



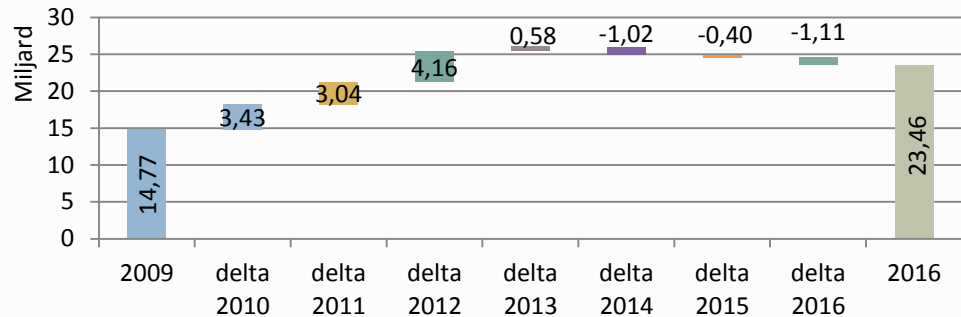
# Mobiel : sms



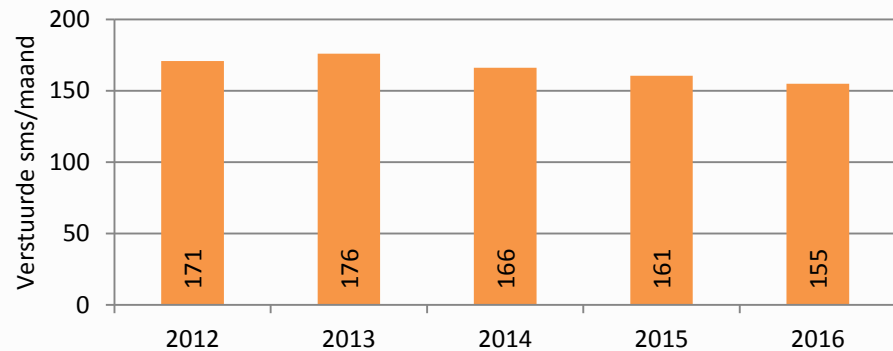
Volume  
-4,5%



Netto  
toevoegingen



Gemiddeld  
gebruik



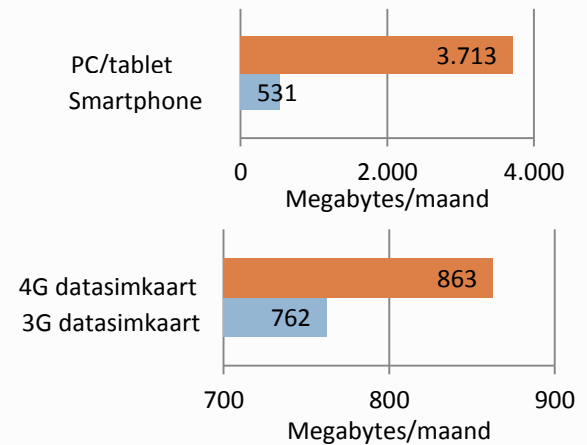
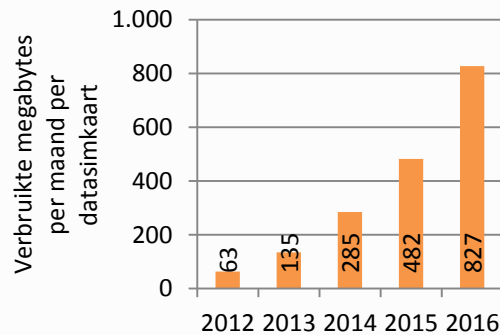
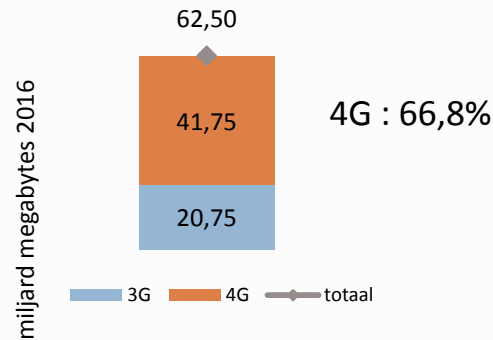
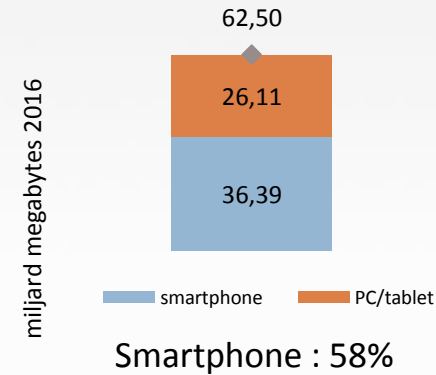
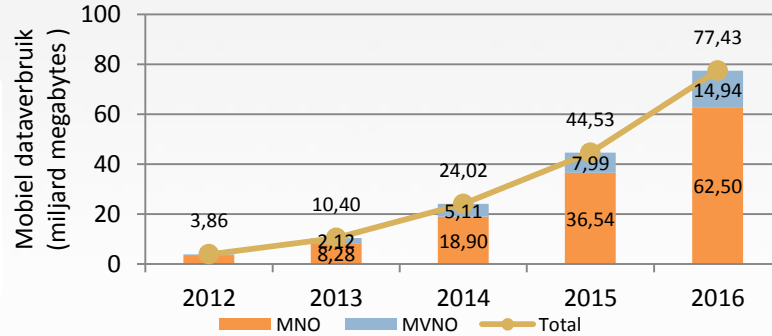
# Mobiel : data



Volume  
+74%

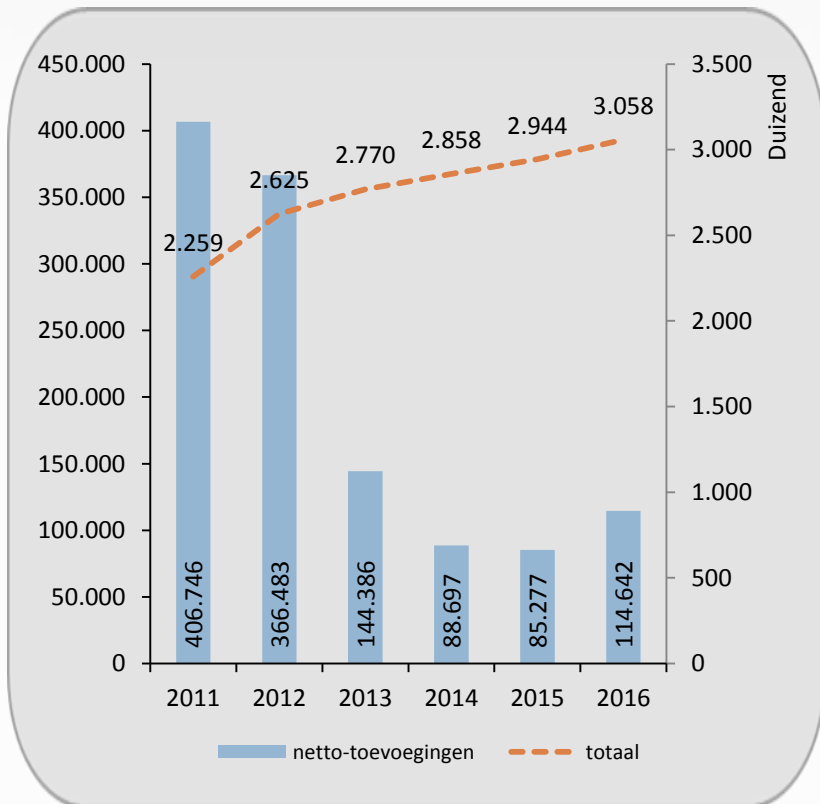
4G

Gemiddeld  
gebruik

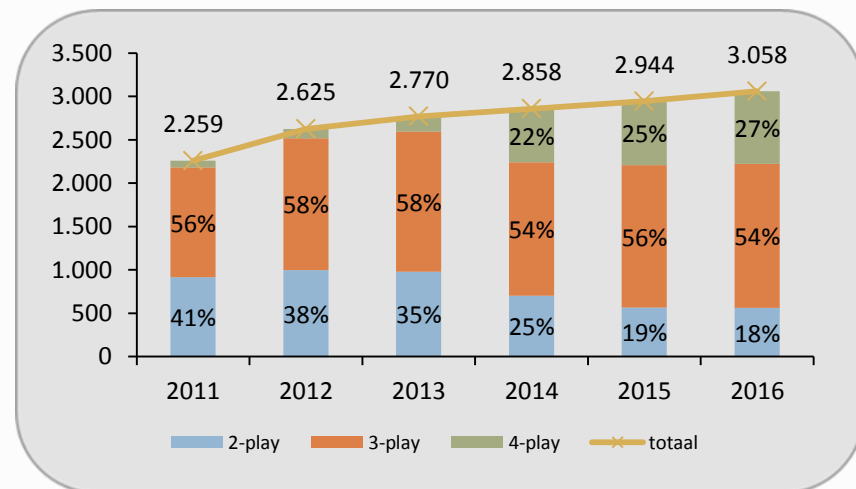
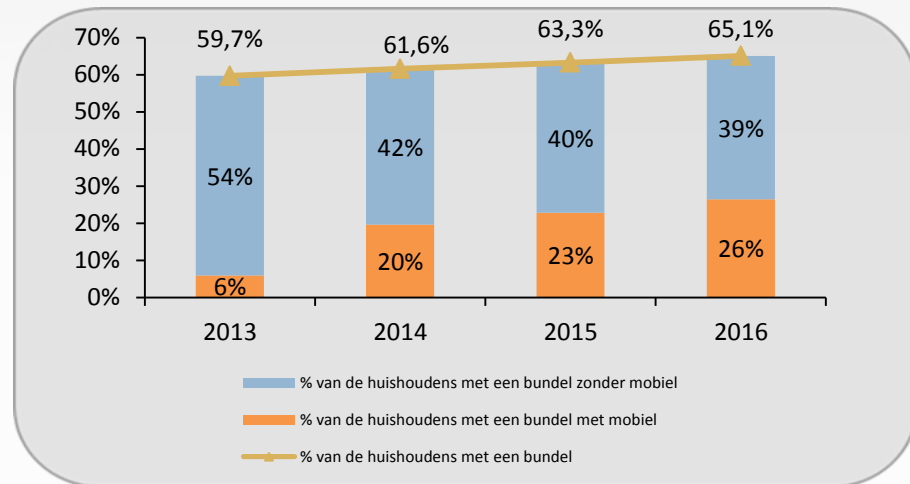


# Bundels

Netto-toevoegingen bundels



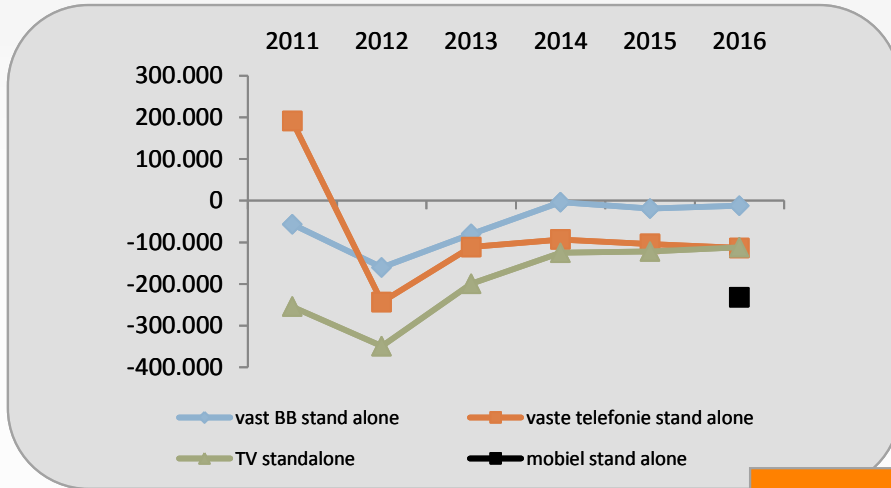
Penetratie



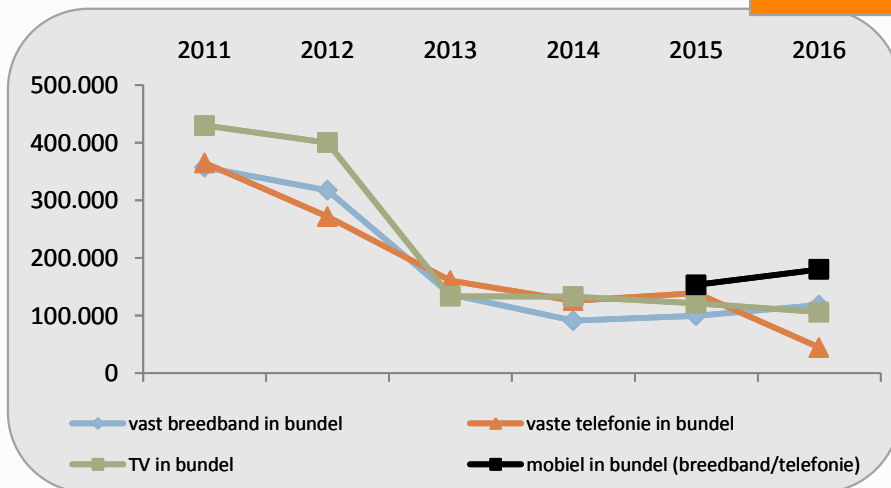
Netto-groei bundels wakkert aan : +3,9% tot 3,058 miljoen en penetratie van 65,1%.  
 Substitutie naar 4-play doet het aandeel van 3-play dalen : van 56% naar 54%.

# Bundels

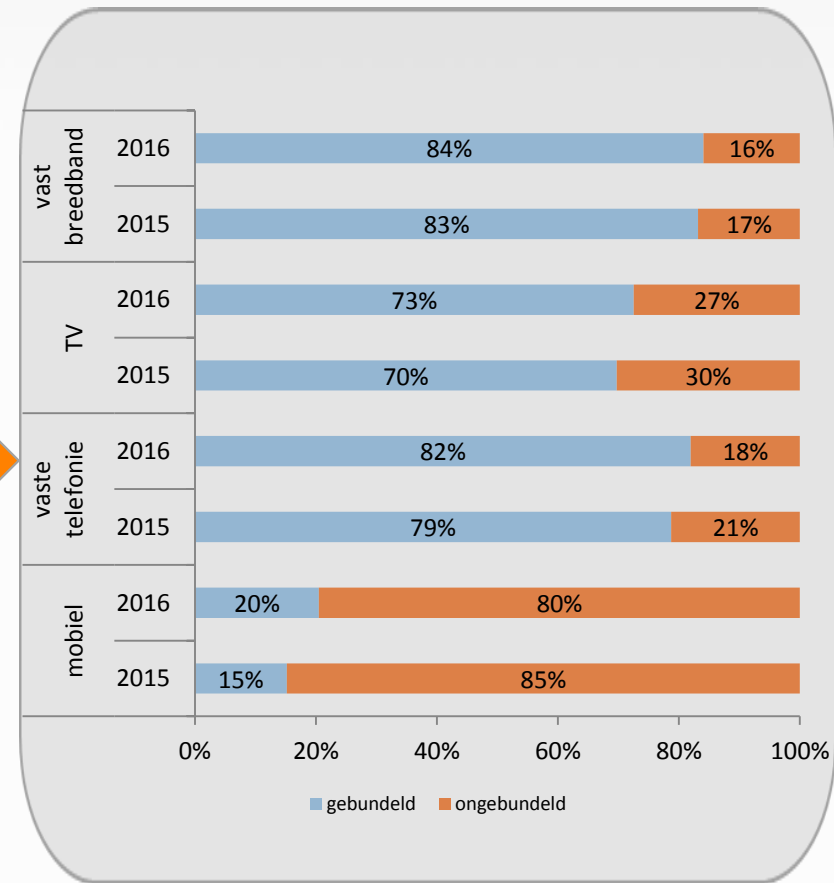
Netto-toevoegingen stand alone



Netto-toevoegingen x-play



Stand alone versus x-play

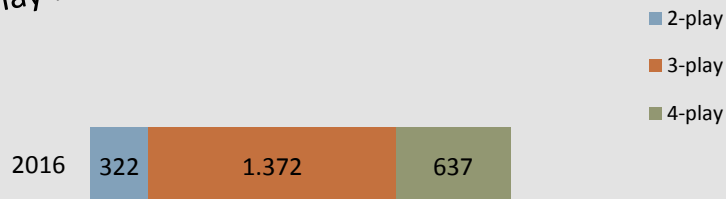


Mobiele diensten in een bundel laten grootste netto groei optekenen : +180.224 huishoudens.

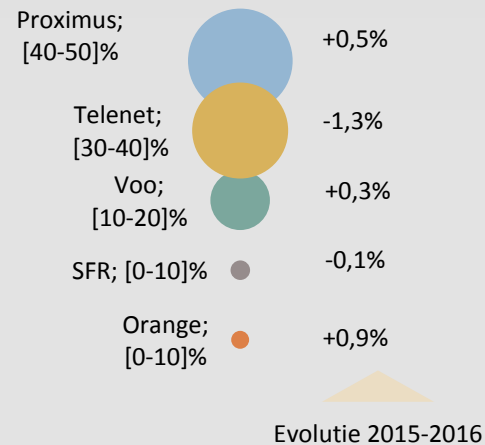
# Bundels

## Inkomsten

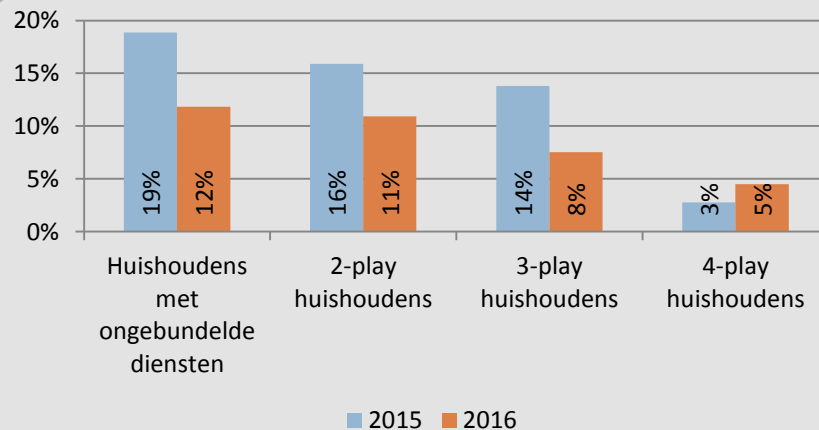
3-play : 60% 2.331 miljoen euro



## Marktaandelen (volume)



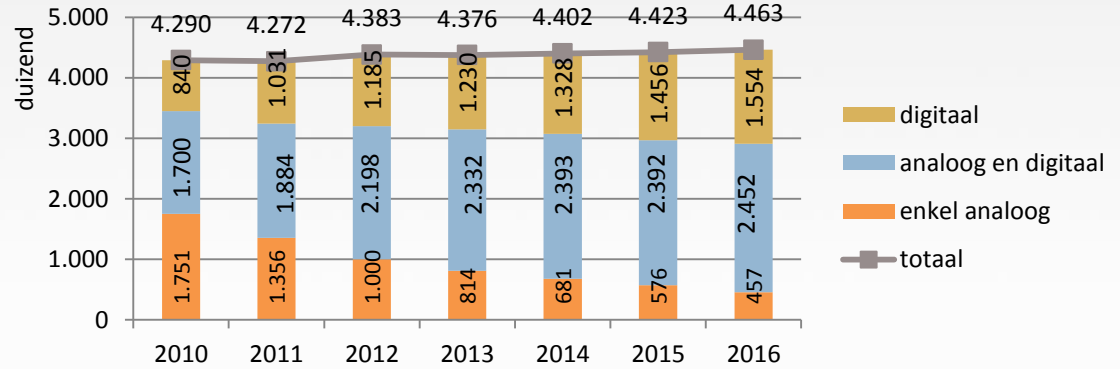
## Churn



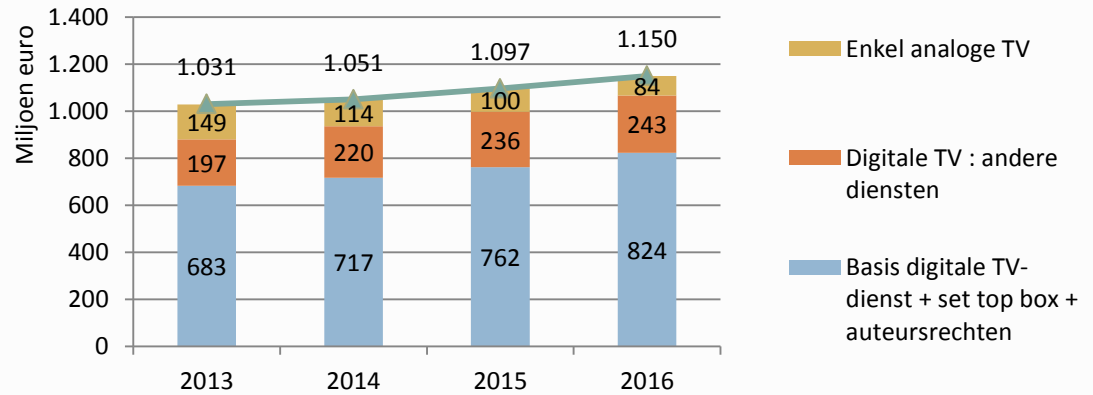
# TV



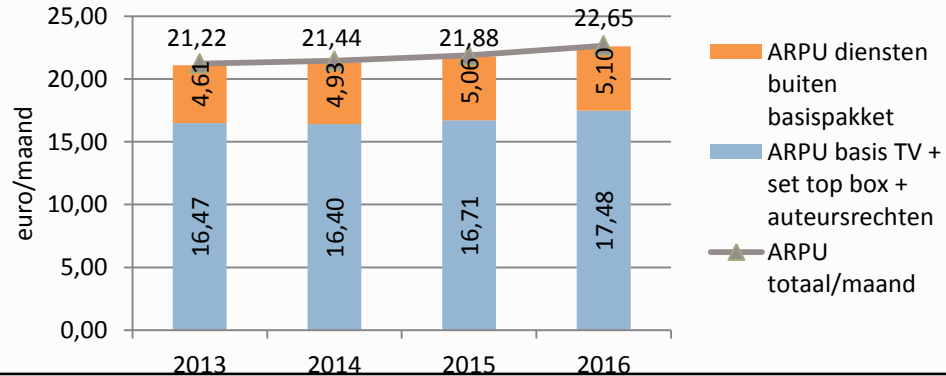
Volume



Omzet



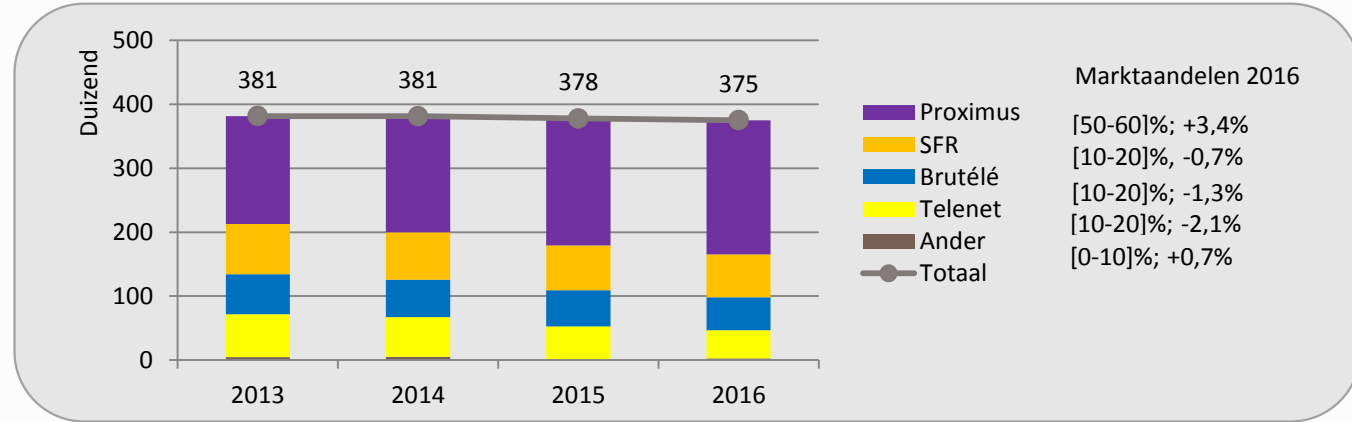
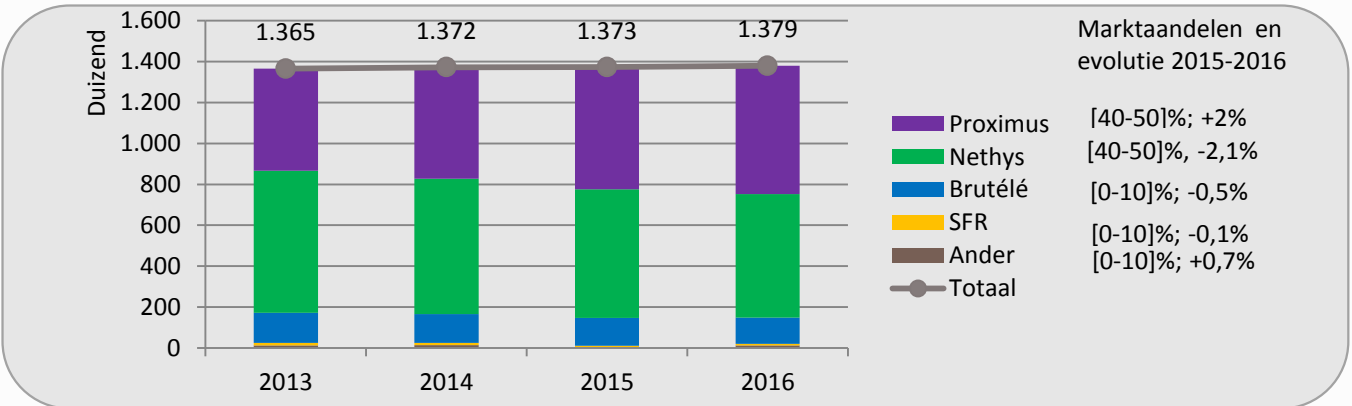
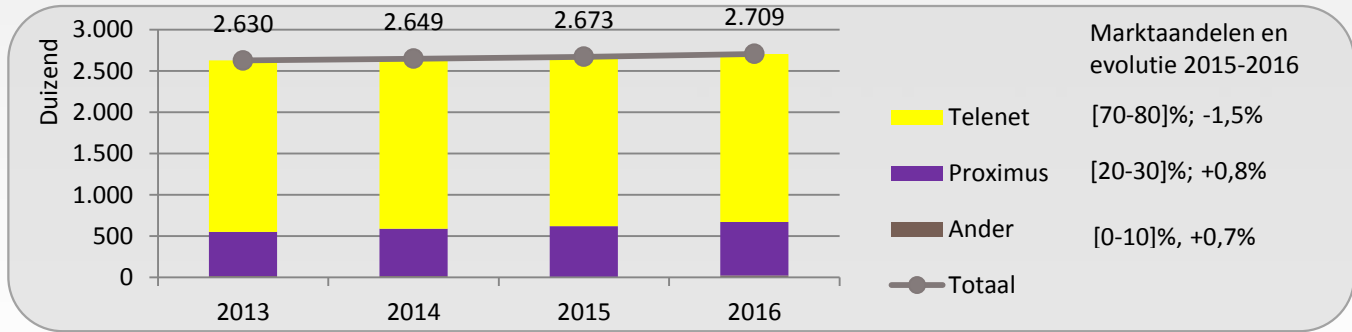
ARPU



Digitale TV-penetratie groeit van 83 naar 85% van de huishoudens – Digitale TV duwt omzet 4,9% hoger tot 1,15 miljard euro – TV ARPU + 3,5%



# TV



# Conclusie

- **INVESTERINGEN OP EEN RECORDNIVEAU (21,9% VAN OMZET)**
- **OMZET NEEMT LICHTJES TOE TOT 8,39 MILJARD €**
- **81 OP 100 BREEDBANDLIJNEN MEER DAN 30 MB EN NR. 1 IN EU**
- **VASTE TELEFONIEMARKT: AANTAL LIJNEN EN OMZET DAALT**
- **MOBIELE MARKT: AANTAL KAARTEN STIJGT EN OMZET BLIJFT STABIEL**
- **GEMIDDELD 827 MBYTE VERBRUIK (+ 58%)**
- **4 PLAY STERKSTE STIJGER MAAR 3 PLAY BLIJFT POPULAIRSTE BUNDEL**
- **4 MIO DIGTALE TV KIJKERS (90%)**