

# BeCloud meets ...

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# Company structure

*A multi-branded, customer oriented organisation*

- 2007, transformation from “Fixed & Mobile” to “Customer centric” with 5 Business units

## Consumer Business Unit (CBU)

... Fixed & mobile Product /services to residential customers

## Enterprise Business Unit (EBU)

... Fixed & Mobile & ICT Product/services to professional customers

## Service Delivery Engine & Wholesale (SDE&W)

... groups together the network & IT services  
... offers services to other operators and suppliers on the Belgian market

## Staff & Support (S&S)

... brings together all the horizontal functions that support the Group's activities

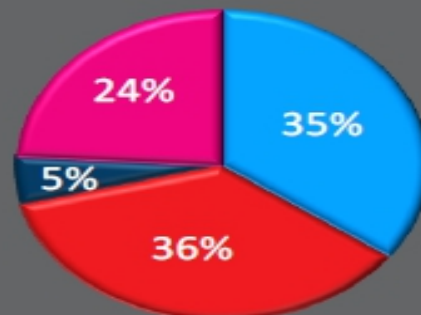
## BICS

... is a joint venture between Belgacom, Swisscom Fixnet, and MTN, and is responsible for international carrier activities

- Multi-branding



- Share in Group revenue per BU\*



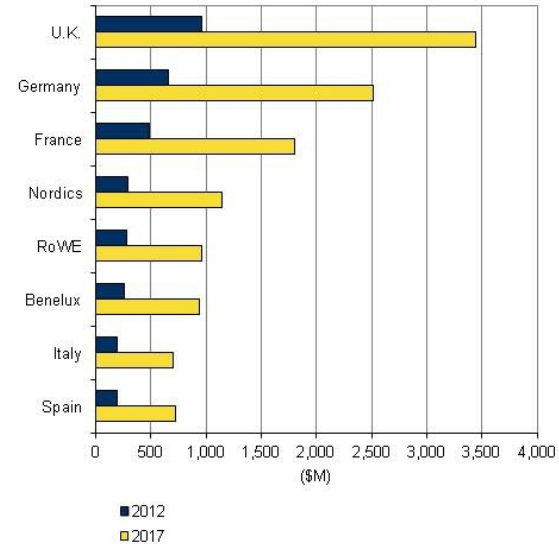
- **Be the #1 Cloud provider in the Belgian B2B market**
  - # 1 in volume & revenue share
  - # 1 in share of mind
- **Grow Group Revenues :**
  - By bringing Cloud services to market
  - By creating cross-sell opportunities to other Belgacom core solutions (Mobile Data, Internet, voice..)
  - By enabling other Products/Solutions
- **Bring a positive EBITDA contribution to the group**
- **Protect the core business by reducing customer churn**

# Cloud adoption in BE-market

*Cloud adoption is taking off* Belgacom cloud services

**19% of the SME's claim to make use of cloud computing. For almost 1 out of 3 (29%) using cloud computing, nearly all of their cloud computing solutions are free solutions.**

## USAGE CLOUD COMPUTING



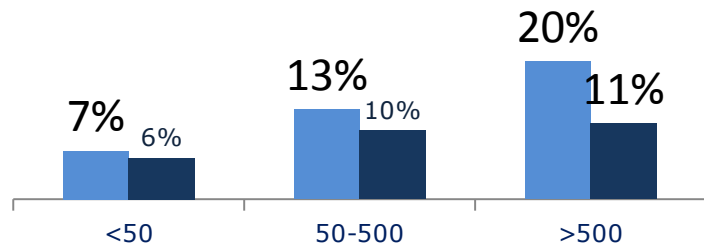
# Cloud adoption in BE-market

*Cloud adoption is taking off*

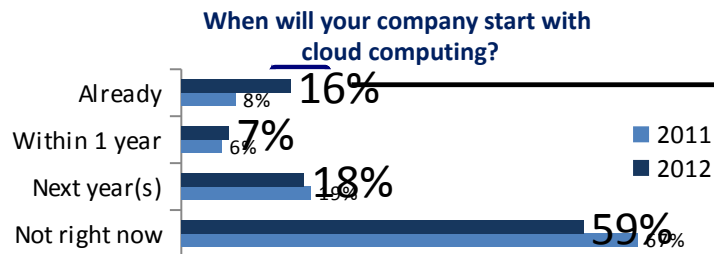
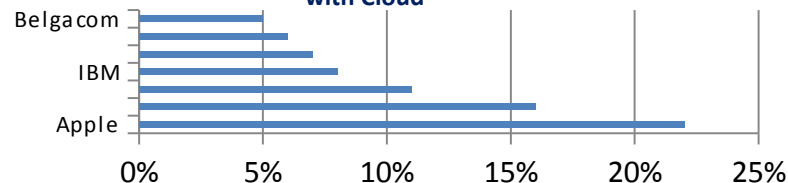
Belgacom cloud services

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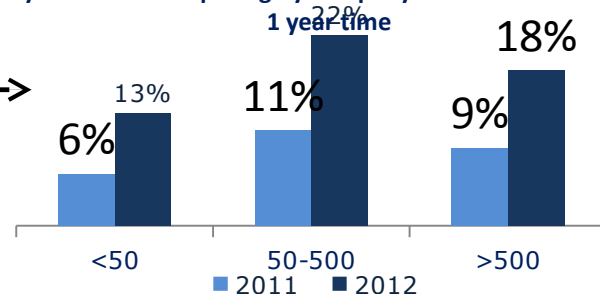
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Company you associate with Cloud : only 5% associate Belgacom with Cloud



Already use cloud computing by company size : Cloud use doubles in 1 year time



# Becloud Strategy

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Some examples of solutions in our catalogue

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	Infrastructure	Storage	Apps Online	Workspace	Datacenter services
<b>Onsite &amp; Private Cloud</b>	Becloud Server Packs Becloud vBlock Becloud Flexpod	Onsite Storage Solutions - EMC - NetApp		Workplace Management  Onsite vDesktop	Housing Matrix Cube IT Services
<b>HYBRID</b> Your cloud bridge	Becloud vContainer	Becloud Server Backup Adv Becloud Storage Gateway	Becloud Collaboration(O365) Becloud eShop Business Outlook Becloud Hosted CRM Becloud Hosted Sharepoint	Hosted vDesktop	
<b>Online &amp; Public Cloud</b>	Becloud vDatacenter Webhosting Becloud VPS Business Becloud VPS Enterprise	Becloud vStorage Becloud PC Backup Becloud PC Backup Pro			

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# Focus on IAAS & SAAS

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The Core Value for any business is in his Applications. Belgacom must enable these Applications to any B2B end-user and provide optimal user-experience.

Value can be created:

- **By selling Apps (Direct driver)**
- **By using the App as driver for Telco service upsell & Loyalty (Indirect driver)**

While leveraging the things we do well & our Assets

- ✓ Multi-channel sales model, suitable to “mass” sales (no technical or vertical business knowledge needed)
- ✓ Factory Products (vs. lots of products with low # customers each)
- ✓ Networks, fix & mobile.
- ✓ Large customer base, each receiving an invoice
- ✓ National infrastructure (“your data in Belgium” – EU compliant)



# Enterprise Application Market

## Market snapshot

### Belgian Software Market 2012 (\*)

€2.2Bn  
(5% CAGR '09-'14)  
  
(AVG Software  
spend/employee =  
~280€/year)

#### Types of software:

- “**Horizontal Apps**”: can be used by any business (e.g. mail, collaboration, backup, etc.).
- “**Vertical Apps**”: purpose built for a specific industry or business usage. (e.g. apps for lawyers, dentists, etc.)
- “**Big Apps**”: platform software that requires high degree of services to customize/setup/maintain (e.g. SAP)

#### Horizontal Apps

€655Mio

#### Vertical Apps

€529Mio

#### “Big” Apps

€1.05Bn

### Belgian Software Market running ‘in the cloud’ 2012 (\*\*)

~€66Mio  
2,5-5% penetration  
19,6% CAGR \*  
-> 12% in 2018



~€46Mio  
5-10% penetration



~€11Mio  
0-5% penetration



~€10Mio  
0-2% penetration

↑  
examples  
↓

(\*) Source = IDC + Gartner + Belgacom intelligence. Services & Infrastructure are excluded.

(\*\*) Includes SaaS & estimated IaaS % in revenues. Includes national & international cloud SPs. This includes infrastructure & services by nature. Advertising revenues are not taken into account.

# Our position ?

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## Customer Needs







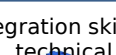


- ✓ Connectivity
- ✓ Data privacy & data localisation
- ✓ Security & reliability
- ✓ Stability & flexibility

## ✓ Simplicity & standard applications

- Belgacom owns all assets to meet customers' expectations
- 'Local presence' is a competitive advantage to face global & USA competitors
- Enterprise infrastructure can also serve Consumer applications (B2C and B2B2C)

We will bring cloud as a non-disruptive new business opportunity.  
It supports the business growth and optimizes costs (capex/opex model)

## Belgacom Assets

Multiple Belgian DC 	Mobile Connectivity 	Fixed Connectivity 
National coverage 	Secure & Trust worthy 	Automated ordering, provisioning & billing 
Integration skills & technical enablement 	G2M & channel 	Partnerships; Solutions Technology & G2 

## Some examples of our bold moves

- Scale through an ECO-system
  - ICT Channel
  - ISV strategy
- Create awareness regarding 'your data is local'
  - How private is public ?
- implement a strong cloud-enablement-platform
  - Your cloud service just one-click-away
- Founding partner of Cloud Team Alliance
- Increase speed by investing in innovative cloud startups

# ICT channel & ISV strategy

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Scaling growth through ECO-system

- collaborate with local IT partners
- Meet your ISV

## Where are we ?

- Multi-channel strategy for BeCloud (channels part of BeCloud organization)
- ISV program 'Becloud Accelerate' launched in March-12



# Privacy

How Private is Public?

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## Why 'local' data ... for Belgacom.. Data in Belgium'?

- Patriot act and Fisa act  
searches on personal data on servers in the USA, in the cloud of US companies and of their subsidiaries all over the world.
- EU Law  
there's protection for the individuals by the ECHR
- Constitutional protection  
USA: there's no constitutional protection for non-USA citizens and there's no transparency
- SLA = BGC CSD per product  
Clear contractual service description of; availability of service, time to repair, time for adding new users/capacity, how the solution is build,

penalties, etc...

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## Dynamic cloud ordering/provisioning tool

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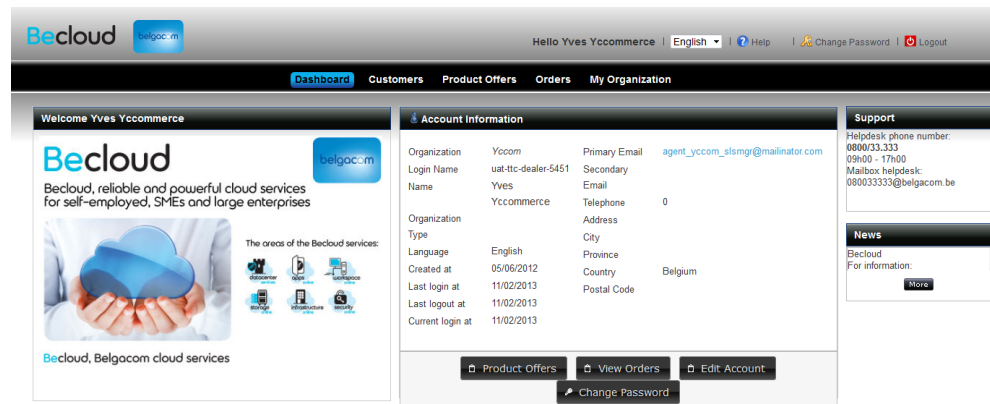
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## Online ordering/shop for:

- ▶ Straight-through processing
- ▶ Cloud billing models incl. PPU
- ▶ Quick/low-cost on boarding new apps
- ▶ Both Belgacom and partner hosted/managed applications
- ▶ One Self-service front-end for the end-customers and partners
- ▶ Single-Sign-On into the different apps
- ▶ Support pages, support by partners



SEAP is the Belgacom tool  
(ordering/sales/management/metering) for cloud services with fully  
automatic provisioning

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The purpose of the Cloud Team Alliance is to give a framework for its Members to:

- *discuss interoperability of the technologies they use for the provisions of cloud services*
- *initiate lobbying activities towards regional, national, European organisations to promote the common interests of its Members,*
- *define best practices for the provision of cloud services.*

→ with a European technical approach as an alternative to the technical approach of American and Asian cloud service providers.



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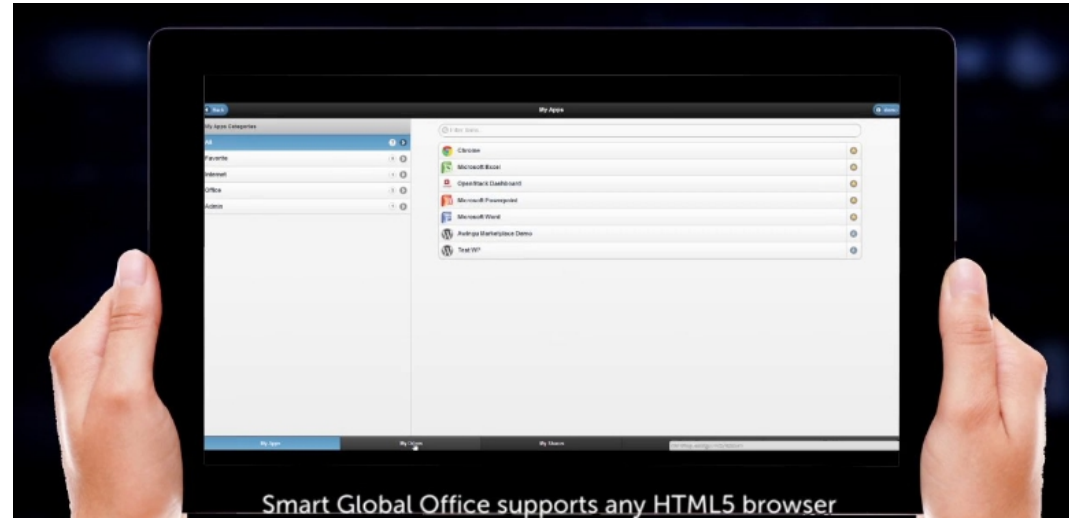


## Strategic investment by Belgacom

- ▶ Minority stake & BoD seat
- ▶ Non-exclusive commercial agreement
- ▶ Close collaboration with internal Dev / Becloud teams

## Smart Global Office - CloudDesktop

- ▶ Fully browser (HTML5) based – OS independent
- ▶ 'Bring Your Own Device' answer
- ▶ Single-Sign-On into the different apps
- ▶ Secure Broker platform



**... an innovative new way to deliver end user IT ... watch the product movie ...**



# Q &A

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