

TIM PARTICIPACOES SA
Form 6-K
March 07, 2008

SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

FORM 6-K

Report of Foreign Private Issuer
Pursuant to Rule 13a-16 or 15d-16 of the
Securities Exchange Act of 1934

For the month of March, 2008

Commission File Number 001-14491

TIM PARTICIPAÇÕES S.A.
(Exact name of registrant as specified in its charter)

TIM PARTICIPAÇÕES S.A.
(Translation of Registrant's name into English)

Av. das Américas, 3434, Bloco 1, 7º andar Parte
22640-102 Rio de Janeiro, RJ, Brazil
(Address of principal executive office)

Indicate by check mark whether the registrant files or will file annual reports under cover Form 20-F or Form 40-F.

Form 20-F Form 40-F

Indicate by check mark whether the registrant by furnishing the information contained in this Form is also thereby furnishing the information to the Commission pursuant to Rule 12g3-2(b) under the Securities Exchange Act of 1934.

Yes No

TELECOM ITALIA ANALYST & INVESTOR BRIEFING

2007 Results & Strategic Guidelines

TIM BRASIL

MARIO CESAR ARAUJO

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2007 Results & Strategic Guidelines

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Agenda

- 2007 results highlights
- The Brazilian market context
- 2008-10 Plan overview
- Targets for 2008-10

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Highlights 2007

TIM Brasil is positioned as leader in value in the Brazilian mobile market, by means of its:

- National presence
- Innovation in terms of Marketing and Technology
- Strong brand

In 2007, main results achieved were:

- Leadership in service revenues share (since 2006)
- Best value customer mix (postpaid segment) and ARPU above market average
- *Top of Mind* (four times in the last 5 years) and best preference index
- Positive Net Cash Flow and positive Net Income
- All 2007 targets achieved

In 2007, TIM Brasil decided to change through:

- Fixed line license acquisition: entrance in fixed and internet market
- Launch of a new business model targeting Low ARPU
- 3G License acquisition

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Footprint of the major players 2007ye

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Leadership with profitability

BR GAAP

** Figure adjusted considering Bill & Keep elimination starting 01/01/06*

***Restated local currency*

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Achievement of all 2007 Targets

| BR GAAP | 2007 Actual | 2007 Targets | |
|----------------------------------|-------------|--------------------|---|
| Customers Portfolio (Mln SIM) | 31,3 | ~29 | a |
| M/S TIM Brasil on SIM | 25.8% | ~26% | a |
| Revenues Growth - Organic* | 14.6% | >10% | a |
| EBITDA margin - Organic | 23.1% | >23% | a |
| Capex (Bln R\$) | 1.9 | >2** | a |
| Op. Free Cash Flow (mln R\$) | 761.7 | Break Even 2007 | a |

* Figure adjusted considering Bill & Keep elimination starting 01/01/06

** Includes 3G and Wi-Max acquisitions

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2007 Results & Strategic Guidelines

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Political and Economic Scenario

- PAC investments approx. R\$ 500 bln to R\$ 900 bln between 2007 - 2010.
- Lower interest rates producing a record bank lending, powering consumer spending
- Positive Trade Balance since 2001
- In January '08, Brazil became a net foreign creditor for the first time in history.

Source: Brazilian Central Bank, Abinee, BNDES

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Regulatory framework

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Competitive Scenario

Challenges ahead

TIM will no longer be the only national player
A 4th operator will start in São Paulo, 35% of Brazilian GDP
Mergers & Acquisitions will continue in 2008
 Oi and Brasil Telecom
 Telemig acquisition by VIVO and Amazonia by Oi.
Number portability
New mobile operator rules (SMP)
Launch of 3G
Handset subsidy

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Market Evolution

Source: Internal estimate

** Service revenues*

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Mobile residual market in lower classes and broadband penetration

Source: IBGE (PNAD, 2006), CGI 2006, Consumer Market Sizing Research

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2007 Results & Strategic Guidelines

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Agenda

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In 2008 TIM will continue to execute on the following strategy

3G: Wireless Broadband

- The PC market* in Brazil will grow +21.3% in 2008 reaching 12.9 mln units, of which 88.3% Desktops and 21.7% Laptops
- Brazil has the highest usage of internet per home user, 23 hours and 04 minutes per month **
- As of Sept 2007 Brazilian dial up internet home users totaled 7.1 mln

* IBOPE/Netratings November 2007

** IDC 2007

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TIM Brasil targets

| <i>BR GAAP</i> | 2007 Actual | 2008 Targets | 2010 Targets |
|------------------------------|--------------------|---------------------|-------------------------|
| Customer Portfolio (Mln SIM) | 31.3 | ~37 | ~43 |
| Mkt Share on SIM | 25.8% | ~26% | stable |
| Revenues Growth - Organic | 14.6%* | > 12% | ~8% (CAGR- 10) 07 |
| EBITDA margin - Organic | 23.1% | > 23% | ~ 29% |
| CAPEX (Bln R\$) | 1.9 | ~3.6** | ~ 7.2 (Cum.-10) 08 |

* Growth considering Bill & Keep elimination starting 01/01/06
Revenues growth reported: 22.7%

** Including 3G licenses (R\$1.3 Bln)

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• Back Up

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CAPEX evolution breakdown

BR GAAP, Bln Reais

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3G Licenses

Brazil's telecoms regulator Anatel, during the 2.100MHz 3G Auction, raised a total of 5.3 bln Reais (US\$2.9 bln), representing an 86.7% premium over the bid base prices

TIM Brasil acquired 10+10 MHz for all areas, but for:

Area III e IV, São Paulo Metropolitan area and North Region: TIM acquired 15+15 MHz

Area VII, Cities of Minas Gerais State that are considered part of TrianguloMineiro : Despite not having acquired 2.100MHz license in this small area, TIM will be able to provide 3G services based on the current 850 MHz license

SIGNATURE

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned, thereunto duly authorized.

TIM PARTICIPAÇÕES S.A.

Date: March 07, 2008

By: /s/ Gianandrea Castelli Rivolta

Name: Gianandrea Castelli Rivolta
Title: Chief Financial Officer and
Investor Relations Officer

FORWARD-LOOKING STATEMENTS

This press release may contain forward-looking statements. These statements are statements that are not historical facts, and are based on management's current view and estimates of future economic circumstances, industry conditions, company performance and financial results. The words "anticipates", "believes", "estimates", "expects", "plans" and similar expressions, as they relate to the company, are intended to identify forward-looking statements. Statements regarding the declaration or payment of dividends, the implementation of principal operating and financing strategies and capital expenditure plans, the direction of future operations and the factors or trends affecting financial condition, liquidity or results of operations are examples of forward-looking statements. Such statements reflect the current views of management and are subject to a number of risks and uncertainties. There is no guarantee that the expected events, trends or results will actually occur. The statements are based on many assumptions and factors, including general economic and market conditions, industry conditions, and operating factors. Any changes in such assumptions or factors could cause actual results to differ materially from current expectations.
