

THE GALLUP ORGANIZATION

ROMANIA

Quantitative Research Report On Mobile Telephony Market

• Business Sample •

Report prepared for:



Decembre 2006 – January 2007

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BACKGROUND INFORMATION AND OBJECTIVES

❑ Between October 2006 – January 2007, The Gallup Organization România carried out a market research on behalf of ANRC to analyse the trends in consumer behaviour for mobile telephony services in order to identify changes in specific retail market structure and behaviour as monitored by ANRC.

❑ The objectives of the market research were as follows :

- penetration and usage rate for mobile telephony services among companies
- which mobile telephony suppliers were used and obstacles/ reasons for changing suppliers
- mobile telephony services and bundled services used and average monthly costs of such services
- brand recognition of mobile telephony services and their tariffs
- mobile telephony service selection criteria; reasons for not consuming the service and substitution of electronic communication services
- level of consumer satisfaction with mobile telephony services used
- degree of replacing mobile telephony services with other electronic communication services generally and other mobile services specifically upon increase of tariffs
- profile of companies which use mobile telephony services.

RESEARCH METHODOLOGY

- **Research target:** active companies in Romania (which submitted 2005 balance sheet and annual revenues > RON 0) and public institutions.
- **Total community:** 394.581 companies and institutions (376.611 companies and 17.970 public institutions).
- **Research unit:** the person in charge with making decisions regarding suppliers of mobile telephony services.
- **Research sample:** 1124 companies and institutions which use mobile telephony services.
- **Sample type:** stratified probabilistic sample.
- **Sampling:** representative sample selected according to two stratification criteria: number of employees and revenue in 2005. The sample was selected according to statistics supplied by Romanian Chamber of Commerce and Industry. The stratification process generated 25 cells. A number of companies / institutions were selected per each cell which was big enough to reach the research sample. The selection of companies was done in two phases. Two filters were used for Ministry of Finance database that includes companies in Romania as the first phase; the filters were built based on sampling criteria. The second phase included the selection of three times more companies than the established sample for each cell. Public institutions were selected at random, without a previous stratification of the database.
- **Field interviews:** 8 November – 15 December 2006.

RESEARCH METHODOLOGY

- ❑ A representative sample per companies was selected for this study and this sample was filtered to obtain final sample of mobile telephony users. The representative sample was used to obtain penetration data of mobile telephony per total community. The users sample was used to obtain data for other objectives of the study.
- ❑ The interviews were conducted by phone on a standard questionnaire with trained operators. The average duration of an interview was 12 minutes.
- ❑ The response rate of eligible companies (which meet selection criteria):

Contacted companies	5974
out of which: - no number / private household	339
- refusal to participate in the research	1549
- non-eligible companies (above quota)	2054
Companii eligibile	2032
- person in charge could not be reached	30
- refusal to participate in the research	547
- no mobile phone	331
Valid main questionnaires	1 124
Response rate for main questionnaire	55%

- ❑ The present report presents the charts of main results of the research.

SOCIO-DEMOGRAPHIC PROFILE OF THE SAMPLE

(N=2032)

Number of employees	N	%
1-2 employees	934	46,0
3-9 employees	696	34,3
10-49 employees	305	15,0
50-249 employees	77	3,8
250+ employees	20	1,0

Revenues in 2005	N	%
Public institution	76	3,7
under 50.000 Euro	1280	63,0
50.000 - 100.000 Euro	230	11,3
100.001 - 500.000 Euro	288	14,2
500.001 - 1 mil. Euro	63	3,1
over 1 mil. Euro	95	4,7

*2005 average exchange rate is the reference: 1 Euro = 3,62 RON

Type of activity (CAEN)	N	%
Public institution	76	3,7
Agriculture and forestry	28	1,4
Industry	284	14,0
Constructions	181	8,9
Trade	578	28,4
Services	834	41,0
Unspecified	51	2,5

Areas	N	%
NORTH-EAST	270	13,3
SOUTH-EAST	223	11,0
SOUTH	138	6,8
SOUTH-WEST	113	5,6
WEST	236	11,6
NORTH-WEST	379	18,7
CENTRE	258	12,7
BUCHAREST	415	20,4



RESEARCH REPORT

I. Penetration Rate of Mobile Telephony Services

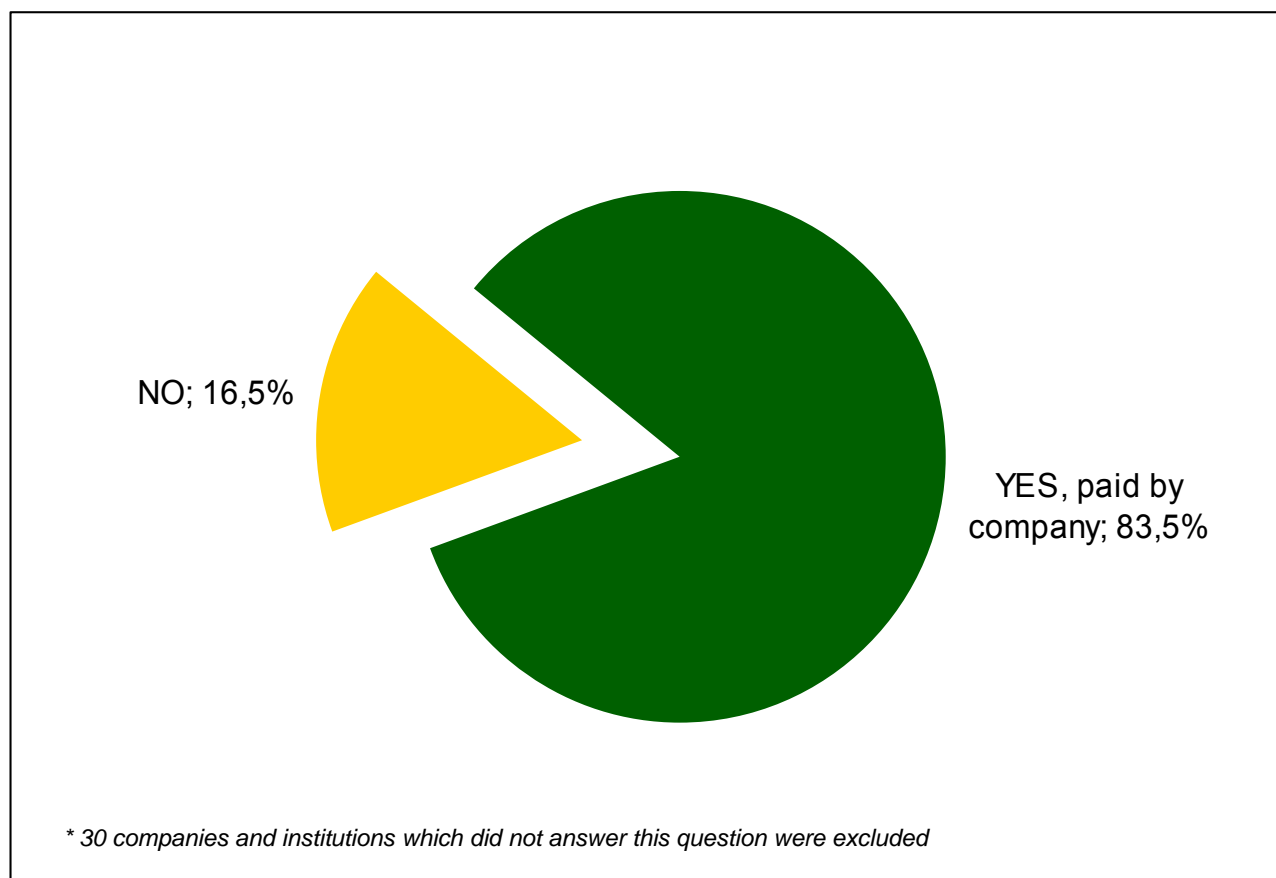
Penetration Rate of Mobile Telephony Services

- 4 out of 5 companies and institutions in Romania (83,5%) use mobile telephony services paid by company. The more number of employees a company or institution has, the higher the penetration rate of mobile telephony, with almost 100% for companies with over 50 employees or revenues over 1 milion EURO.
- Per area, there are no significant differences of penetration rate and usage; however, companies and institutions of South-West, West and North-East seem to use less mobile telephony for communication.
- Per total number of companies and institutions in Romania, about 329.475 companies and institutions use mobile telephony services paid by company.

Penetration Rate of Mobile Telephony Services per Companies and Institutions

Does your company employees use mobile telephony
services paid by company?

Reference: representative sample of
companies and institutions, N =2032



Penetration Rate of Mobile Telephony Services

per number of employees and revenue

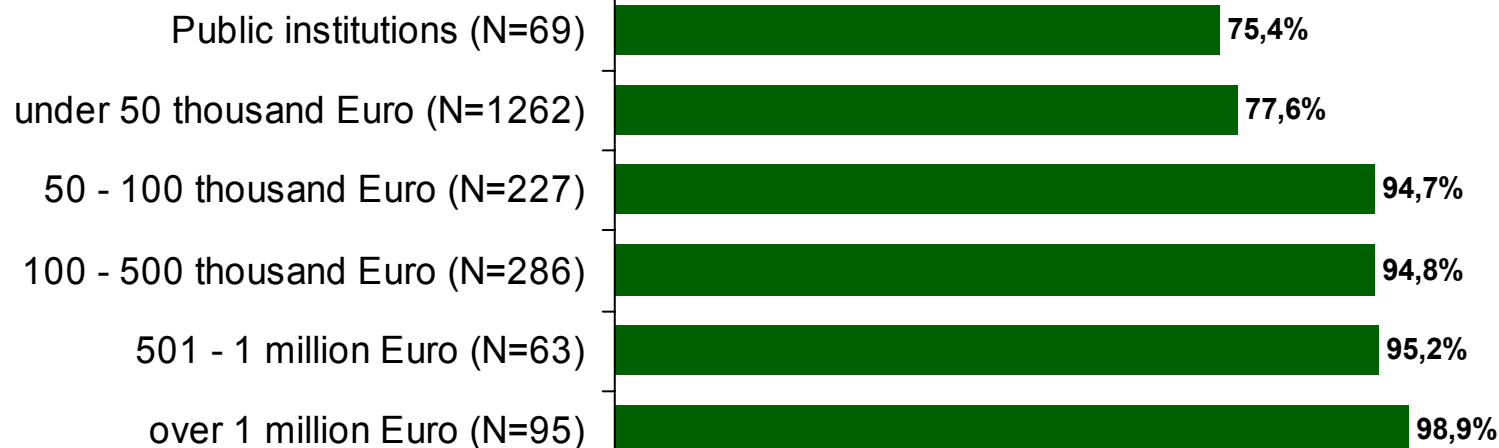
Does your company employees use mobile telephony services paid by company?

Reference: representative sample of companies and institutions, per size of company and revenue

No. employees



Revenue in 2005



* 30 companies and institutions which did not answer this question were excluded

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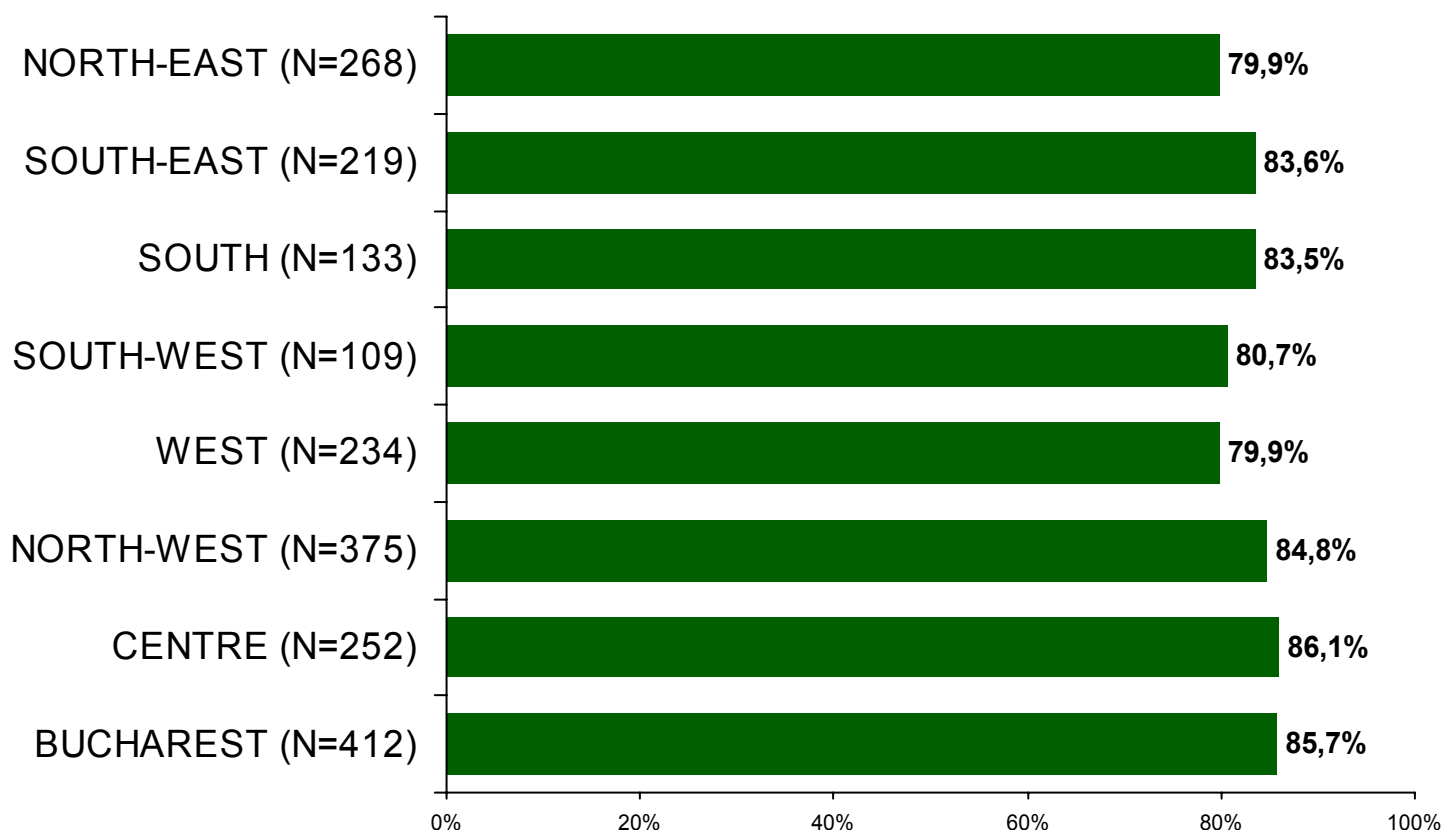
ROMANIA

Penetration Rate of Mobile Telephony Services

per area

Does your company employees use mobile telephony services paid by company?

Reference: companies and institutions per areas



* 30 companies and institutions which did not answer this question were excluded

II. Mobile Telephony Services Used by Companies and Institutions

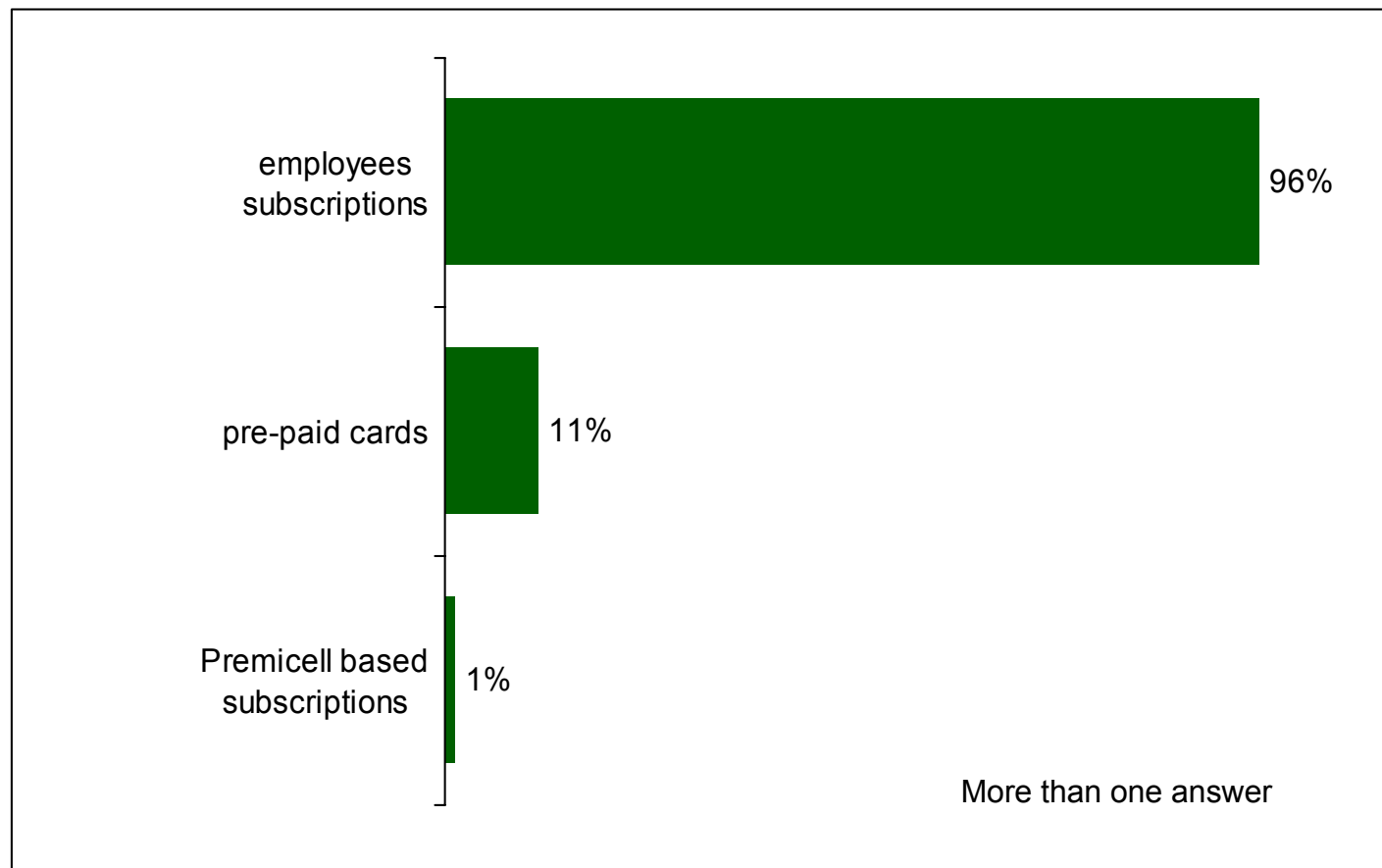
Mobile Telephony Services Used by Companies and Institutions

- Most companies and institutions which use mobile telephony services in Romania have subscriptions (96%), 11% use pre-paid cards, and 1% use Premicell subscriptions. As expected, Premicell subscriptions are used mostly by companies with over 50 employees, while smaller companies (1-2 employees), use mostly pre-paid cards.
- Mobile telephony market structure is determined by the big number of companies that use subscription-based services (88%). 7% of companies and institutions use both subscription and pre-paid cards, and 3,8% of them use only pre-paid cards.
- Almost one quarter of companies and institutions which use mobile telephony services with subscriptions and pre-paid cards have started using services since 2005; 10% has used them since 1997 or before.

Mobile Telephony Services Used by Companies and Institutions

Does your company / institution use mobile telephony service subscriptions for employees? How about Premicell SIM cards? How about pre-paid cards?

Reference: companies and institutions which use mobile telephony services, N = 1124

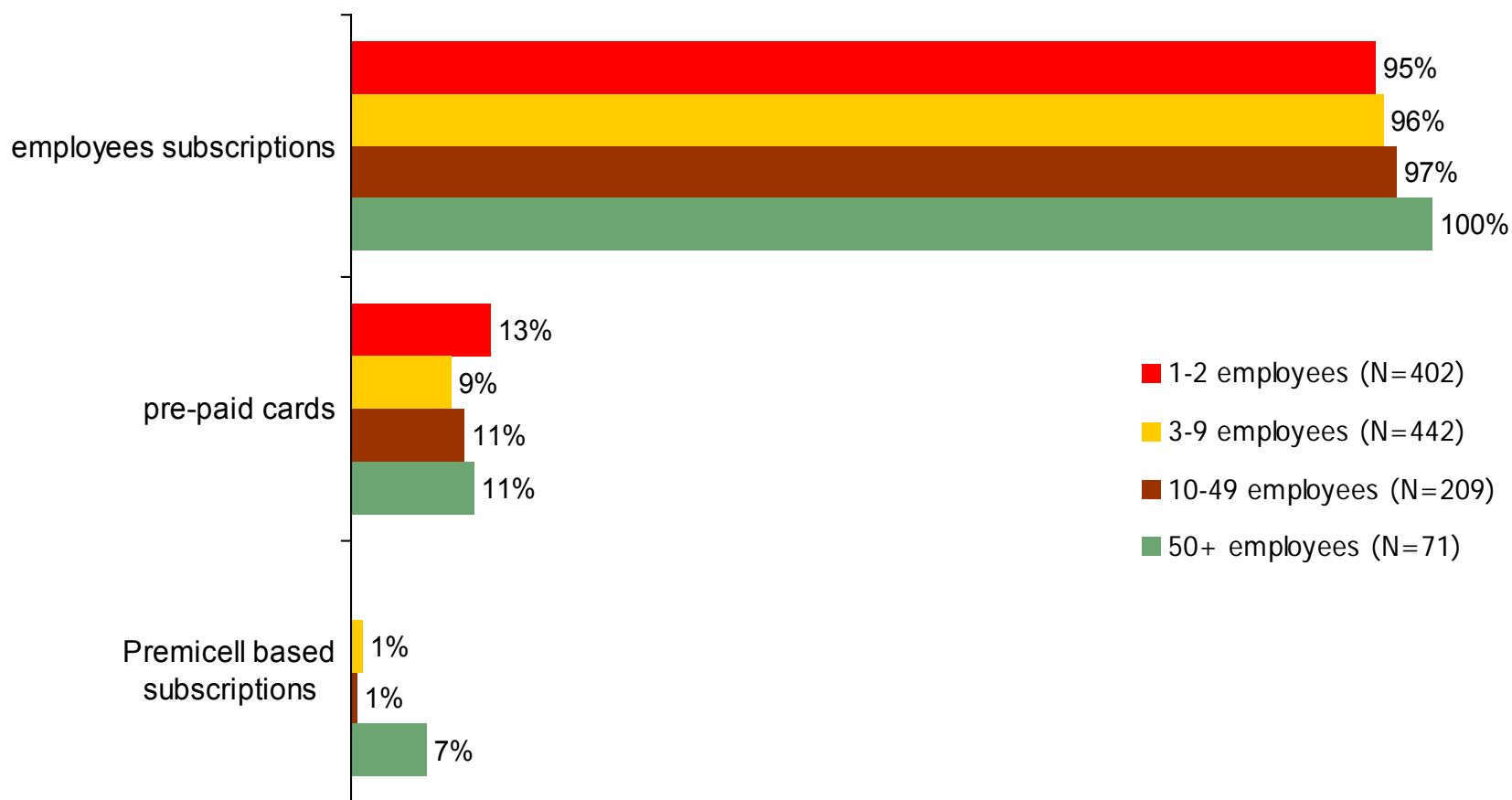


Mobile Telephony Services Used by Companies and Institutions

per size of company and institution

Does your company / institution use mobile telephony service subscriptions for employees? How about Premicell SIM cards? How about pre-paid cards?

Reference: companies and institutions which use mobile telephony services

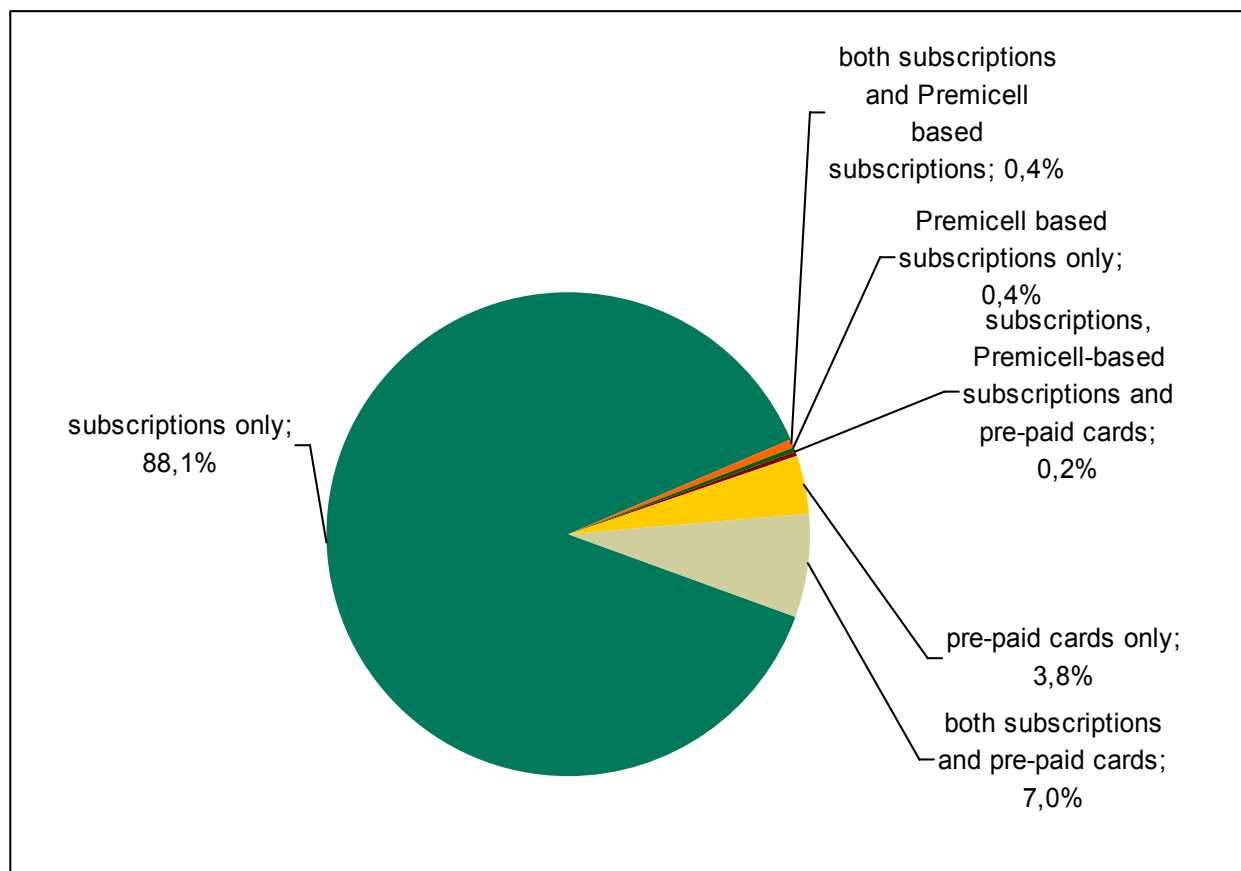


More than one answer

Structure of Mobile Telephony Service Market

Does your company / institution use mobile telephony service subscriptions for employees? How about Premicell SIM cards? How about pre-paid cards?

Reference: companies and institutions which use mobile telephony services, N = 1124

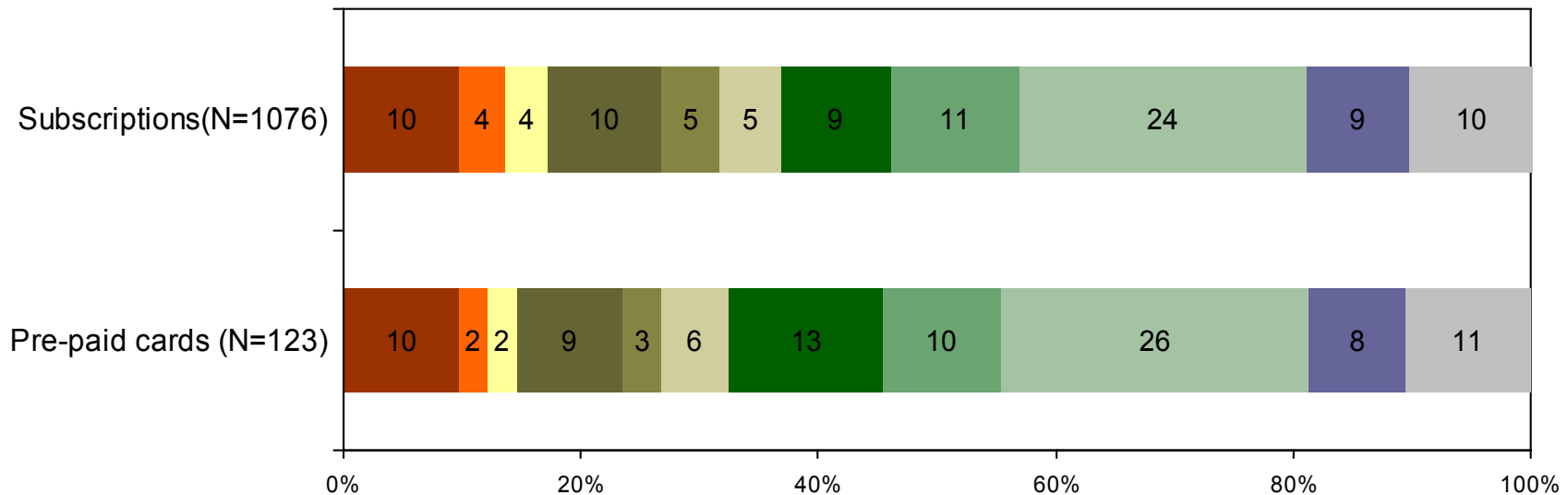


Age of Mobile Service Usage

Since when has your company used mobile telephony for employees with subscriptions / pre-paid card/ Premicell?

Reference: companies and institutions which use mobile telephony services with subscription / pre-paid card / Premicell

1997 or before 1998 1999 2000 2001 2002 2003 2004 2005 2006 DNK



Premicell-based subscriptions (N = 12)

no. of companies/institutions *	
1999	1
2000	1
2003	2
2004	3
2005	2
2006	1
NR	2

* note: reference number is too small to establish percentages

III. Mobile Telephony Suppliers

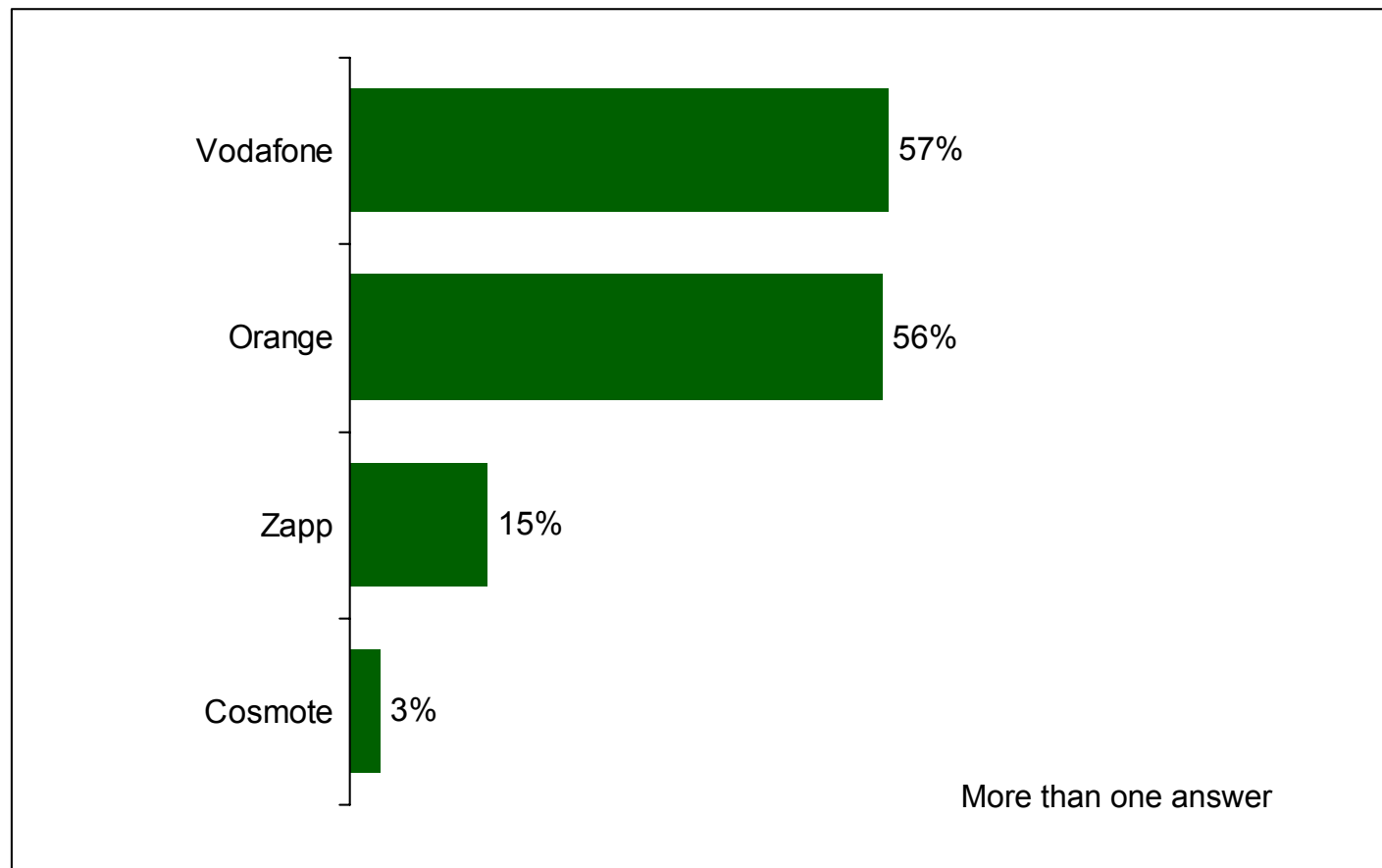
Mobile Telephony Suppliers

- Vodafone and Orange, as mobile telephony suppliers, have a similar penetration rate (57% and 56%) per sample of companies and institutions; Zapp has 15%, and Cosmote 3%.
- Orange has a higher penetration rate for bigger companies of over 50 employees, as compared to Vodafone. Zapp penetration rate increases with the size of company, from 8% for 1-2 employees companies and institutions to 18% for 10-49 employees companies to 24% for over 50 employees companies.
- The bigger the company or institution the more diversified needs and cost control, which determine the use of mobile services of two or more suppliers. Consequently, 15% of 1-2 employee companies use two suppliers while 32% of over 50 employee companies use two suppliers. Similarly for 3 or more suppliers – 2% as opposed to 9%.
- In terms of market share calculated per number of SIM cards of companies and institutions, Orange has 6 percentage more than Vodafone (46% as opposed to 40%). Zapp market share is 12%, while Cosmote is 2%.
- Orange and Vodafone are more differentiated when it comes to type of services provided and use of pre-paid cards. While subscription service share is similar to global market structure for Orange and Vodafone (45% vs. 41%), Orange has 60% of pre-paid cards market while Vodafone only 30%.
- 63% of companies and institutions use individual subscriptions from suppliers and only 19% use group subscriptions. Almost 40% of Zapp subscriptions are group users, as opposed to other suppliers (22% for Vodafone, 16% for Orange and 13% for Cosmote).

Mobile Telephony Suppliers

Which supplier do you use for mobile telephony subscriptions/ pre-paid cards / Premicell-based subscriptions?

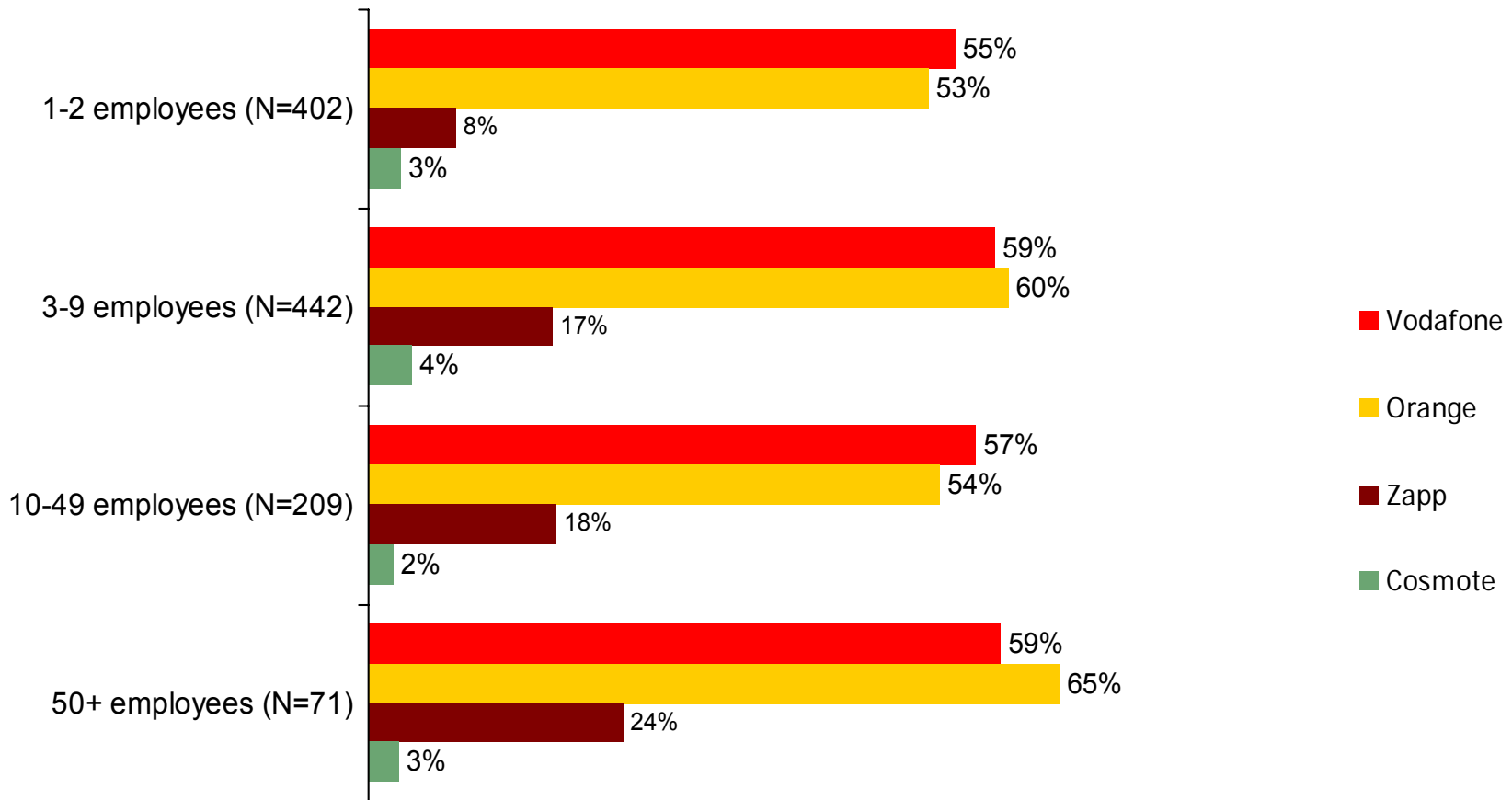
Reference: companies and institutions which use mobile telephony services, N = 1124



Mobile Telephony Suppliers

Which supplier do you use for mobile telephony subscriptions/ pre-paid cards / Premicell-based subscriptions?

Reference: companies and institutions which use mobile telephony services, per number of employees

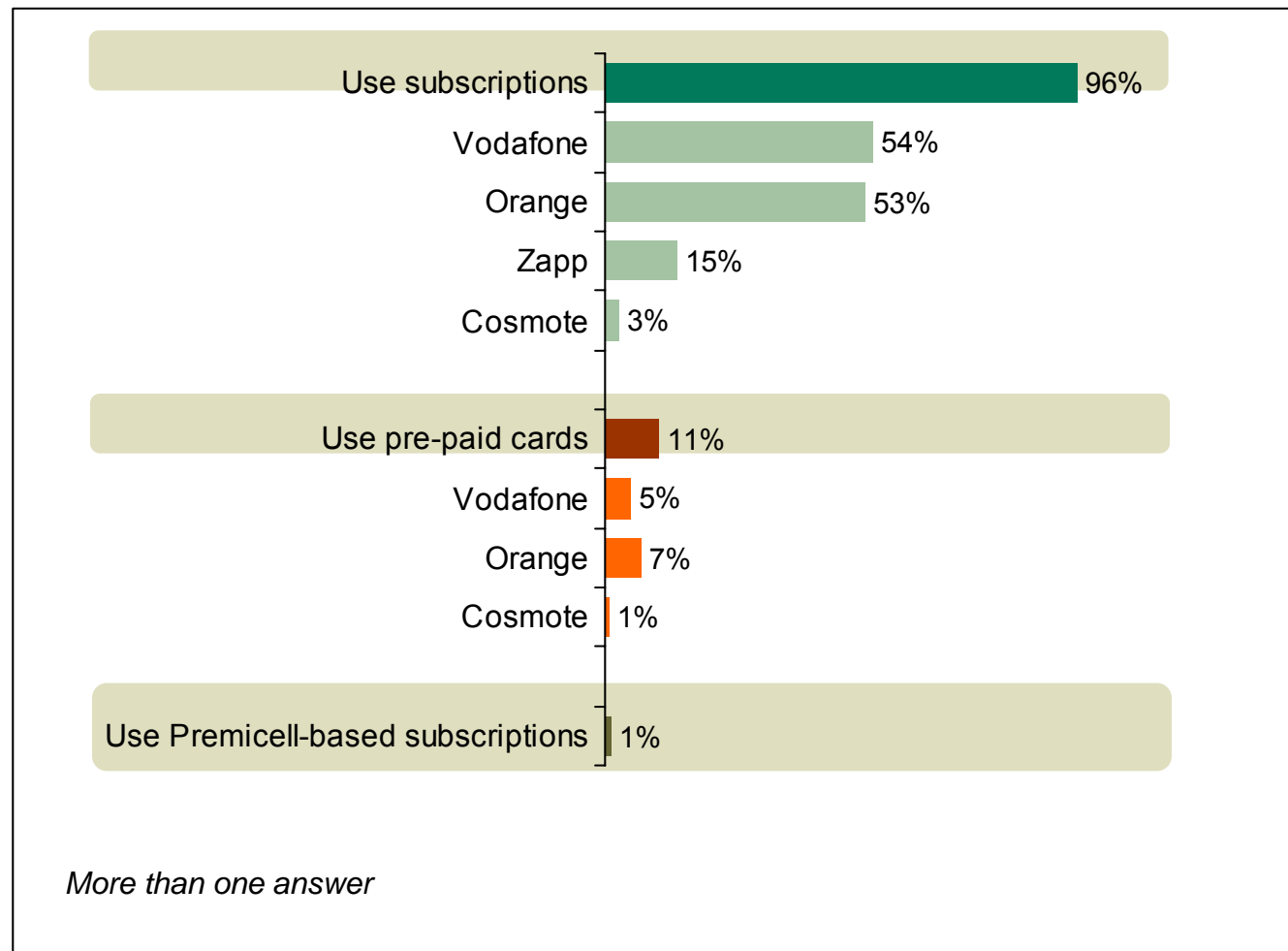


More than one answer

Mobile Telephony Market per Supplier and Type of Service

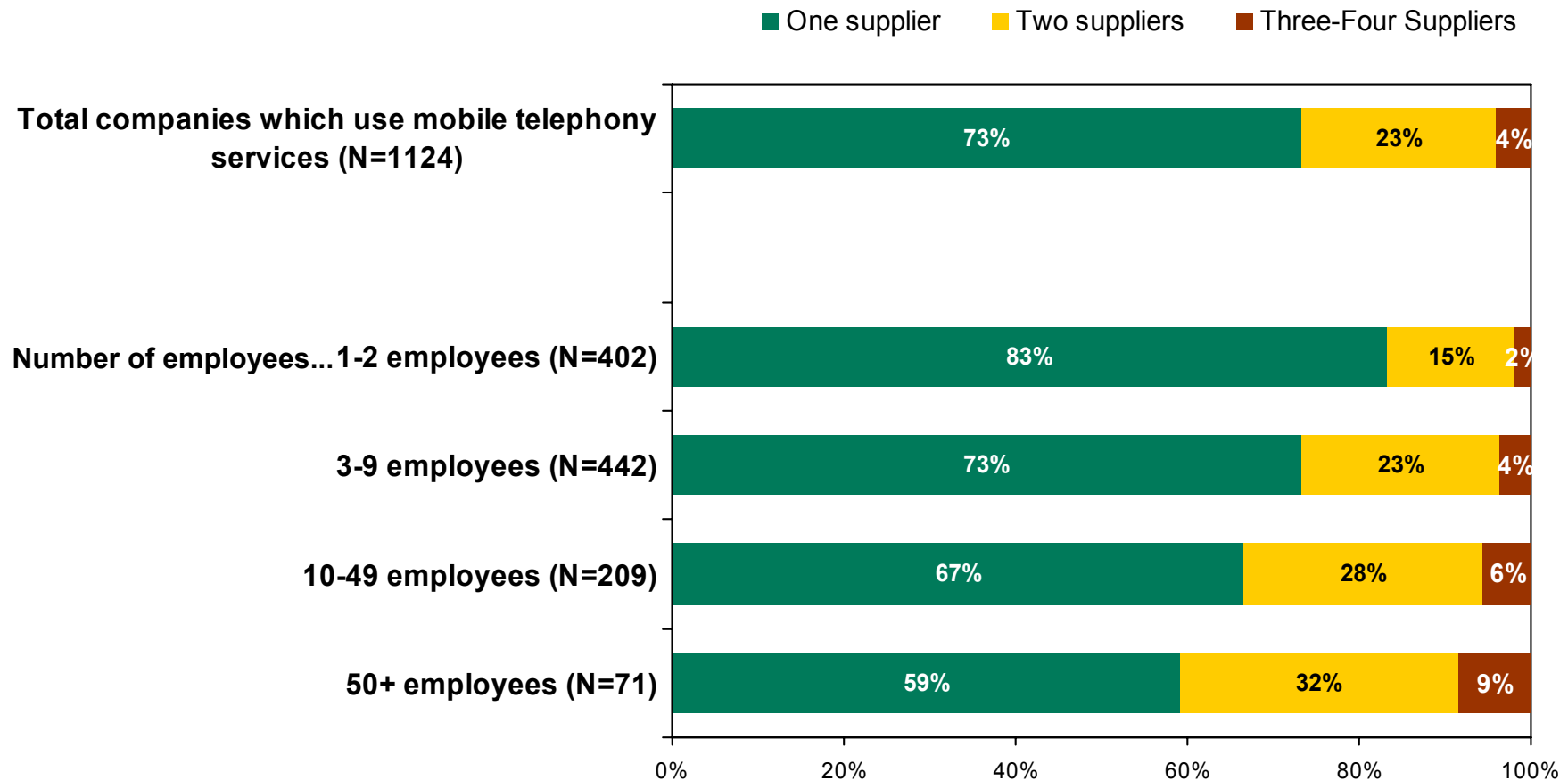
Which supplier do you use for mobile telephony subscriptions/ pre-paid cards / Premicell-based subscriptions?

Reference: companies and institutions which use mobile telephony services, N = 1124



Number of Mobile Telephony Suppliers Used by Companies and Institutions

Which supplier do you use for mobile telephony subscriptions/ pre-paid cards / Premicell-based subscriptions?



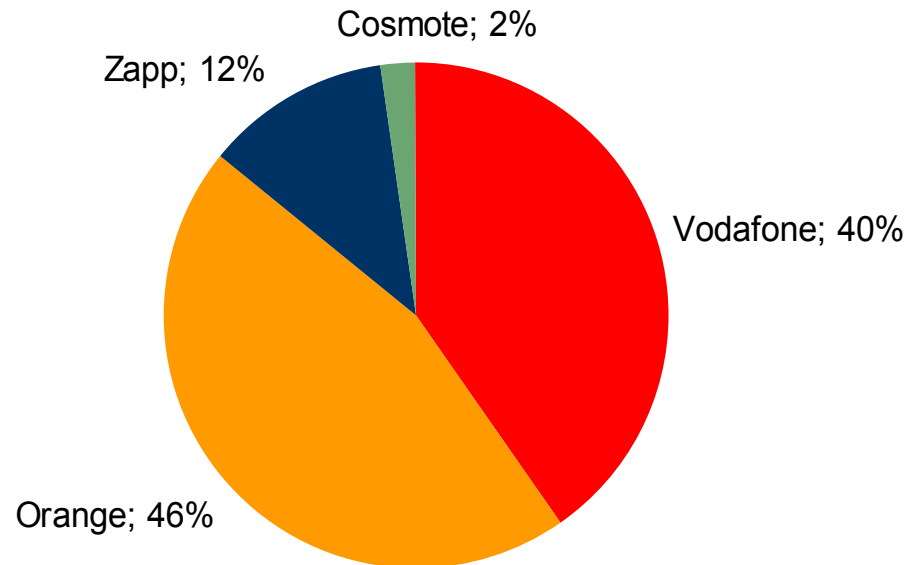
More than one answer

Market Share Estimation per Number of SIM Cards

How many phones (SIM cards) do you have from each supplier?
How many pre-paid cards do you have from each supplier?
How many numbers (SIM cards) for Premicell do you have from this supplier?

Reference: total number of SIM cards (N=5.980)

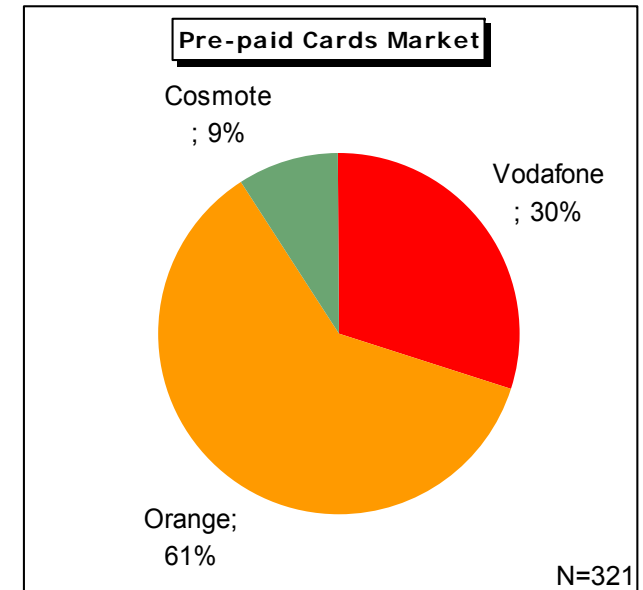
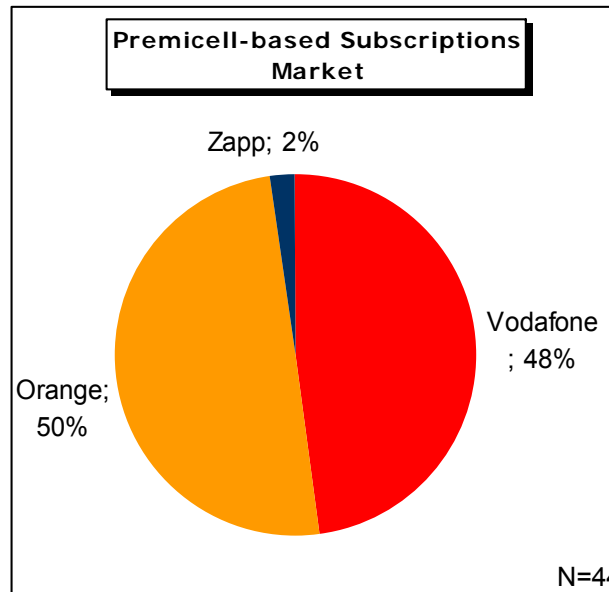
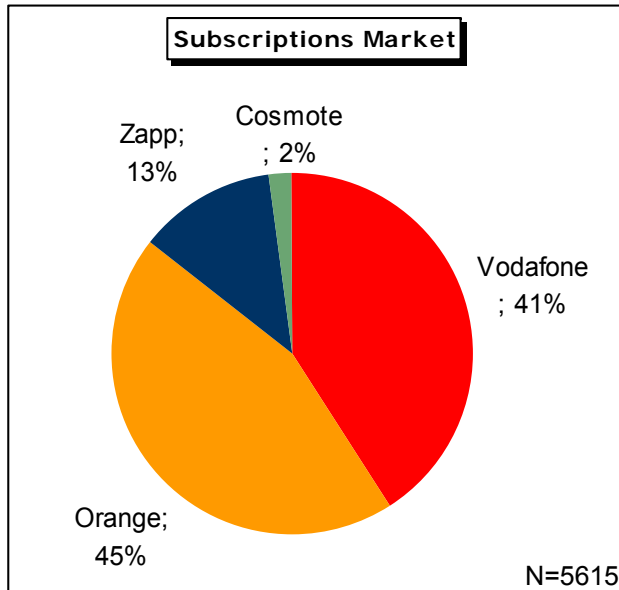
TOTAL (subscriptions + pre-paid cards + Premicell-based subscriptions)



Market Share Estimation per Number of SIM Cards

How many phones (SIM cards) do you have from each supplier?
How many pre-paid cards do you have from each supplier?
How many numbers (SIM cards) for Premicell do you have from this supplier?

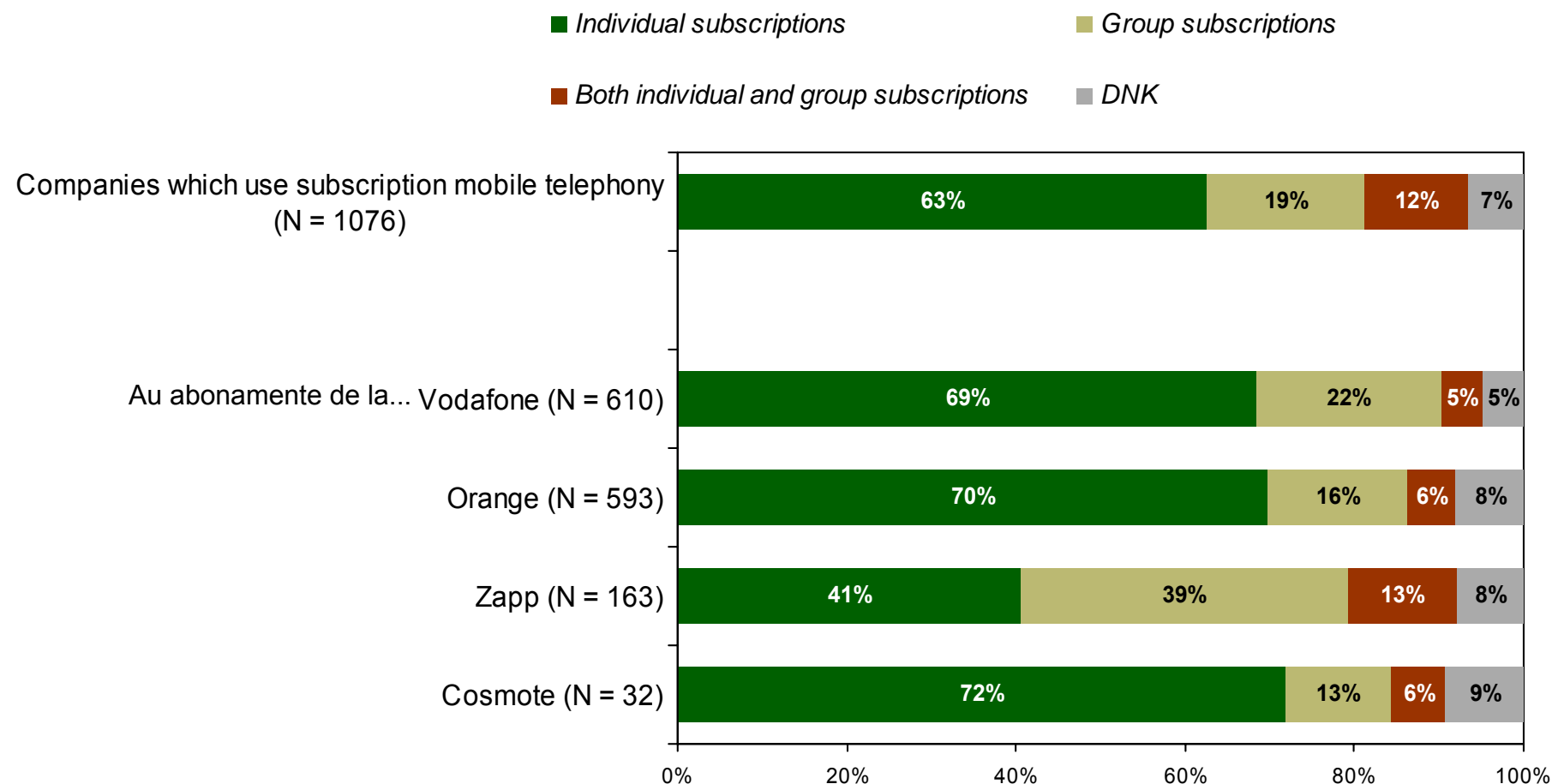
Reference: number of
subscriptions/ pre-paid cards/
Premicell-based subscriptions



Type of Subscriptions Used by Companies and Institutions

Do you have individual subscriptions or group subscriptions from these suppliers?

Reference: companies and institutions which use subscriptions of mobile telephony services



IV. Cost of Mobile Telephony Services

Cost of Mobile Telephony Services

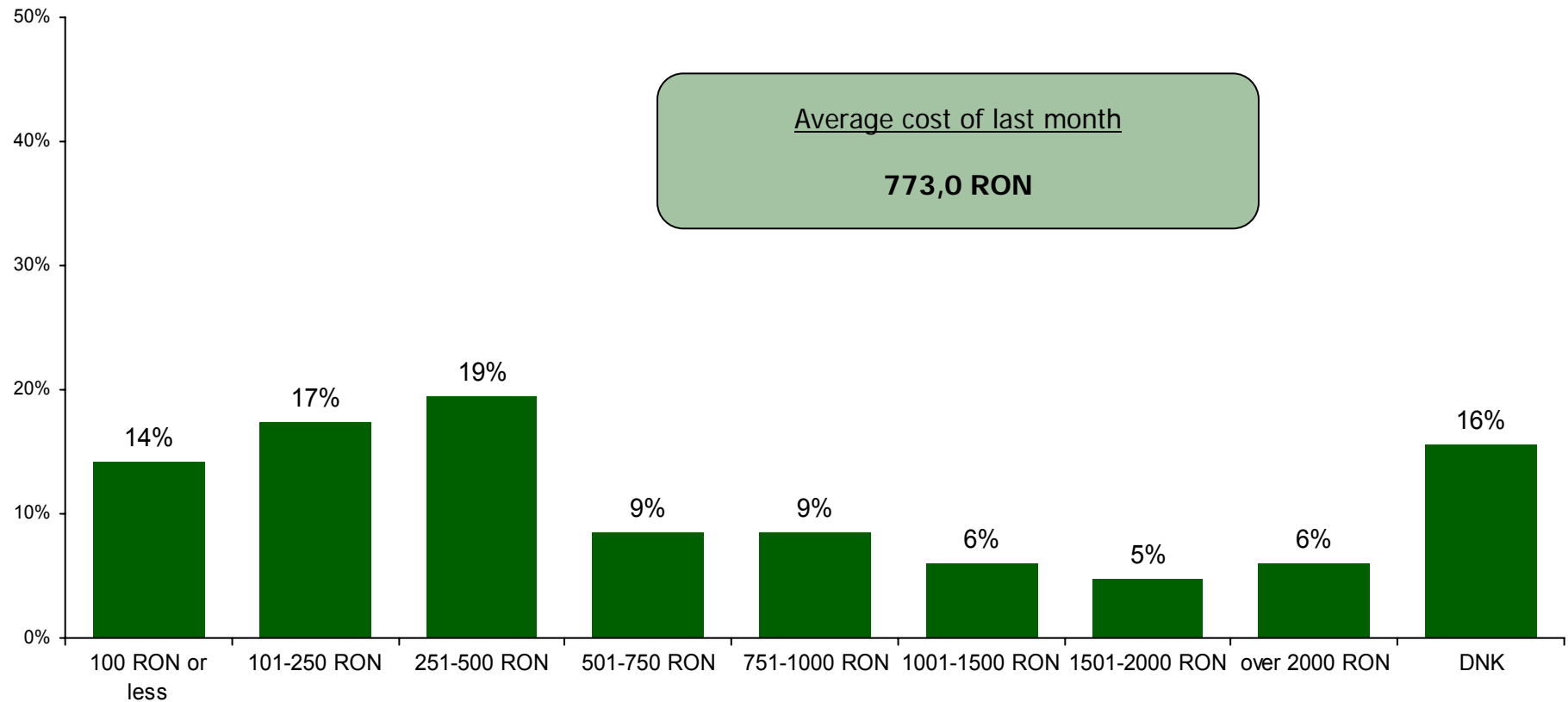
- Less than half of companies and institutions spend up to RON 500 per month on average for mobile telephony subscriptions, while half of them do not spend more than RON 250 for pre-paid cards. The average amount spent by companies and institutions for subscriptions was RON 791 for last month, and RON 149 for pre-paid cards. Companies spend RON 349 per month on average for Premicell-based subscriptions (this value needs to be taken into account cautiously because of the small number of respondents).
- Companies spend on average RON 50 more for Vodafone subscriptions as opposed to Orange subscriptions. They spend on average RON 15 more for Orange pre-paid cards as opposed to Vodafone pre-paid cards.
- The average monthly costs of subscriptions for mobile telephony services are significantly higher for companies with over 50 employees (RON 2.500) and significantly lower for 1-2 employee companies (RON 361). Revenue analysis indicates that a higher revenue generates higher subscriptions costs for mobile telephony services, from RON 524 for companies with revenues under 50 000 EURO to RON 1.113 for companies with revenues between 100.000 and 500.000 EURO and to RON 2.373 RON for companies with revenues over 1 million EURO. Public institutions spend on average RON 760 per month for subscriptions of mobile telephony services.
- Pre-paid cards monthly costs are significantly higher among companies and institutions with over 50 employees (RON 293) and significantly lower for 1-2 employee companies (RON 110).
- 84% of mobile telephony costs are spent for mobile to mobile calls and 16% for mobile to fixed calls. Public institutions register a higher cost of mobile to fixed calls per total cost (23%) than companies.

Total Monthly Costs of Mobile Telephony Services

(Individual subscriptions + premicell + pre-paid cards)

What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?
What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?
What is the approximate monthly cost of Premicell-based subscription services from each supplier on an average month (including VAT)?

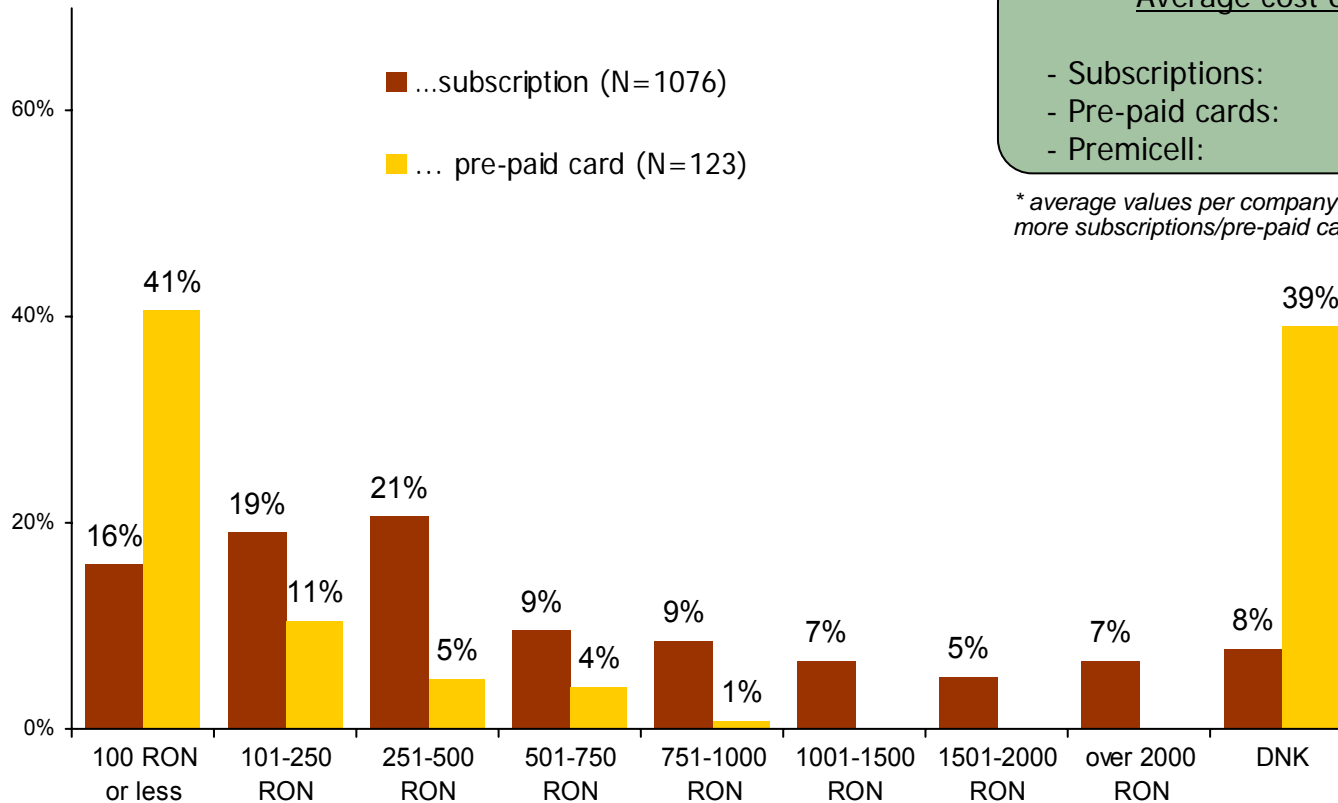
Reference: companies and institutions which use mobile telephony services, N = 1124



Total Monthly Costs of Mobile Telephony Services

What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?
 What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?
 What is the approximate monthly cost of Premicell-based subscription services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use mobile telephony services



Average cost of last month

- Subscriptions: **790,7 RON**
 - Pre-paid cards: **149,2 RON**
 - Premicell: **394,2 RON**

** average values per company; a company can have more subscriptions/pre-paid cards*

... with Premicell-based subscription (N = 12)

no. of companies *	
150 RON	1
200 RON	1
215 RON	1
500 RON	1
600 RON	1
700 RON	1
NR	6

** note: reference number too small to establish percentage*

Total Monthly Costs of Mobile Telephony Services - VODAFONE -

What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?

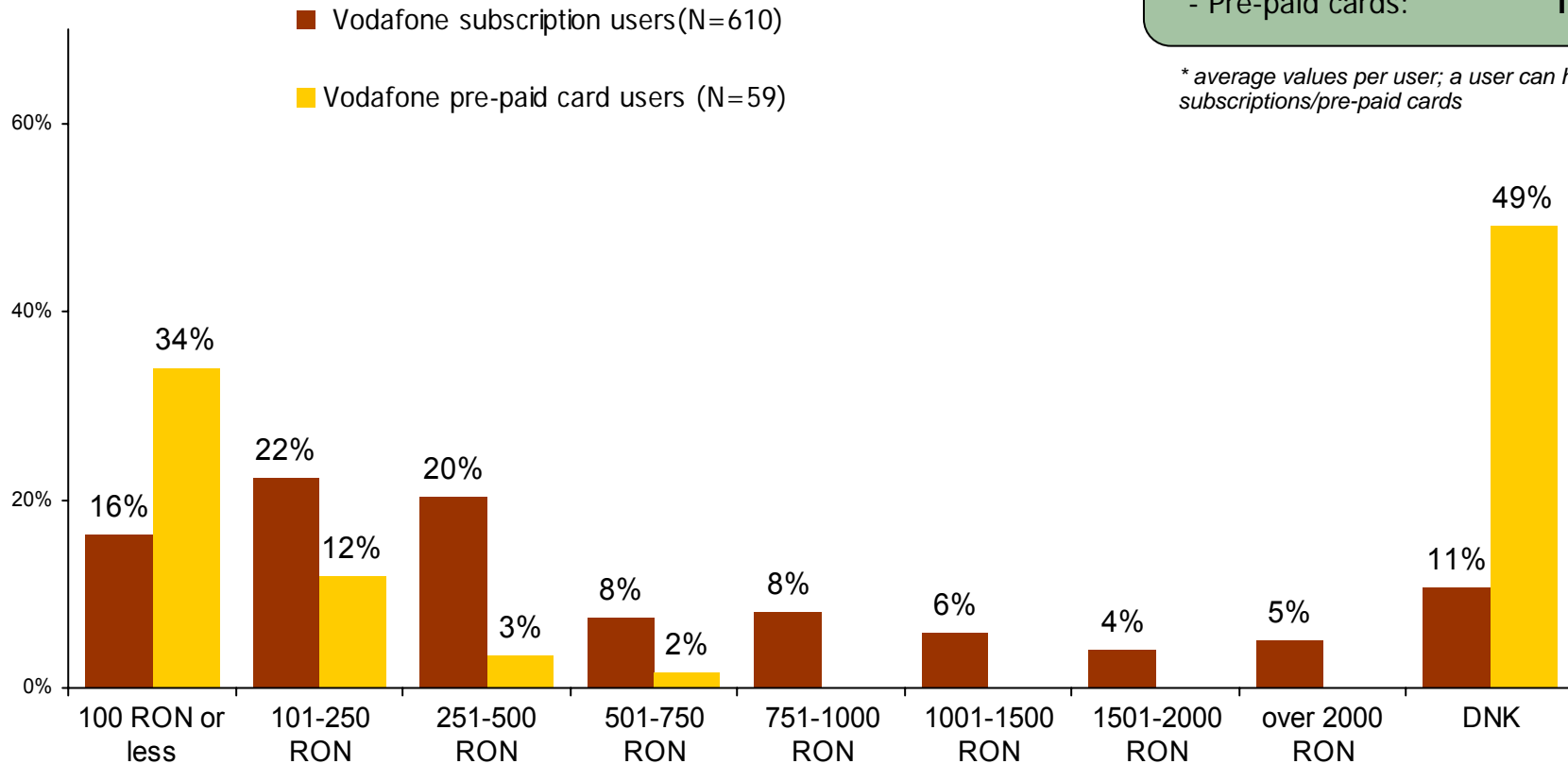
What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use Vodafone mobile telephony services

Average cost of last month

- Subscriptions: **677,5 RON**
- Pre-paid cards: **118,9 RON**

** average values per user; a user can have more subscriptions/pre-paid cards*



Total Monthly Costs of Mobile Telephony Services

- ORANGE -

What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?

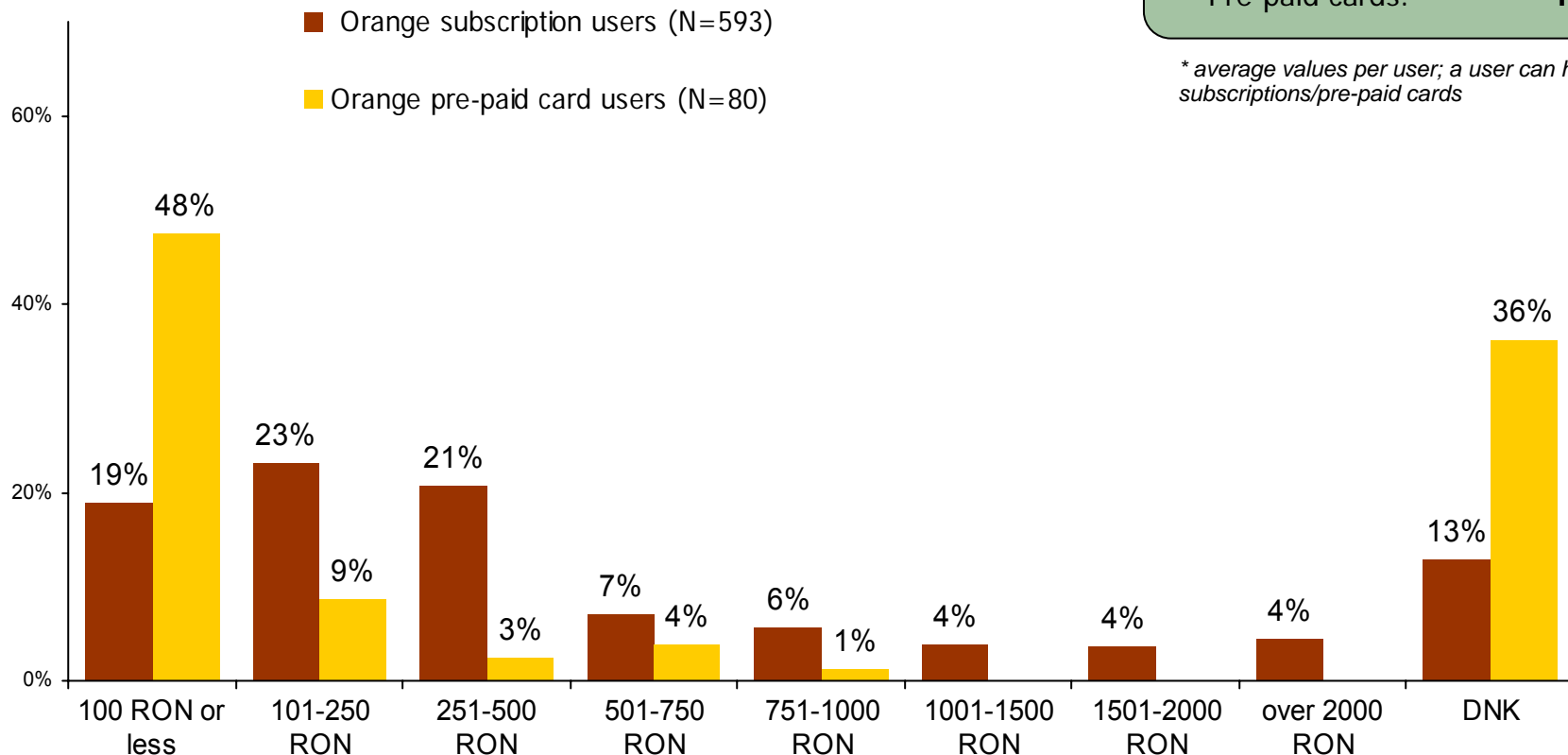
What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use Orange mobile telephony services

Average cost of last month

- Subscriptions: **619,1 RON**
- Pre-paid cards: **133,8 RON**

** average values per user; a user can have more subscriptions/pre-paid cards*



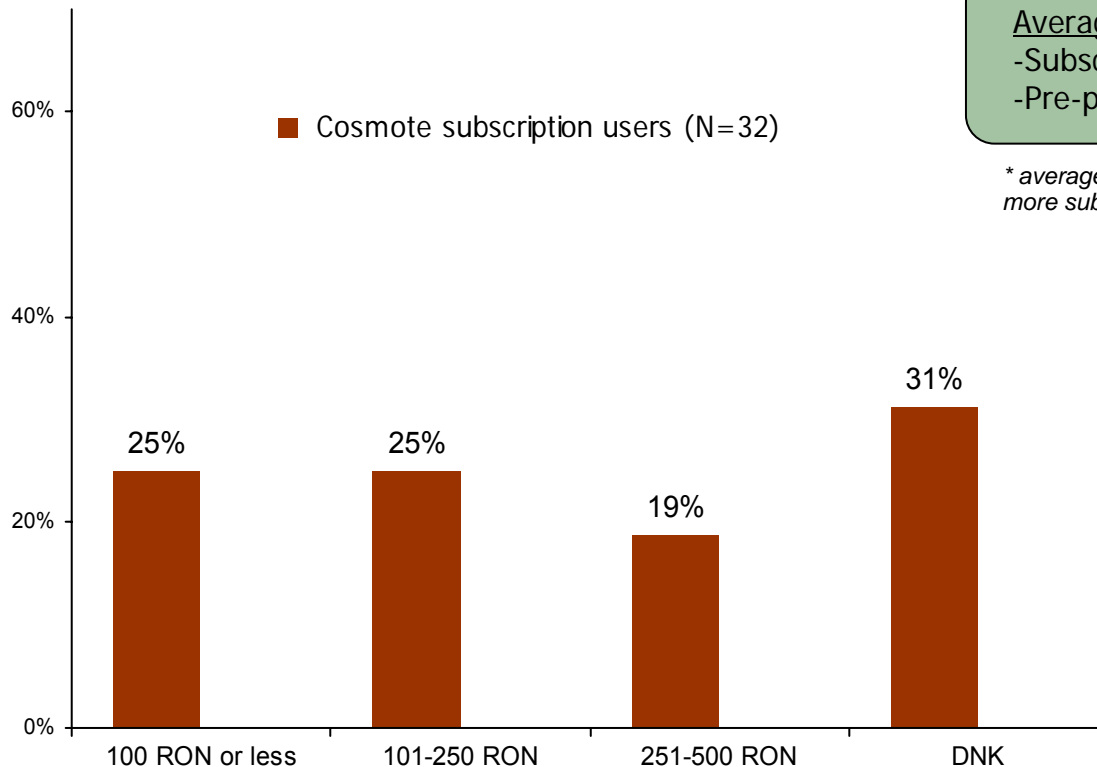
Total Monthly Costs of Mobile Telephony Services

- COSMOTE -

What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?

What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use Cosmote mobile telephony services



Average cost of last month

-Subscriptions: **194,3 RON**
-Pre-paid cards: **190,8 RON**

** average values per company; a company can have more subscriptions/pre-paid cards*

Cosmote pre-paid card users (N=10)

	no. of companies *
30 RON	1
36 RON	1
50 RON	1
60 RON	1
150 RON	1
300 RON	1
400 RON	1
500 RON	1
DNK	2

** note: reference number too small to establish percentage*

Total Monthly Costs of Mobile Telephony Services - ZAPP -

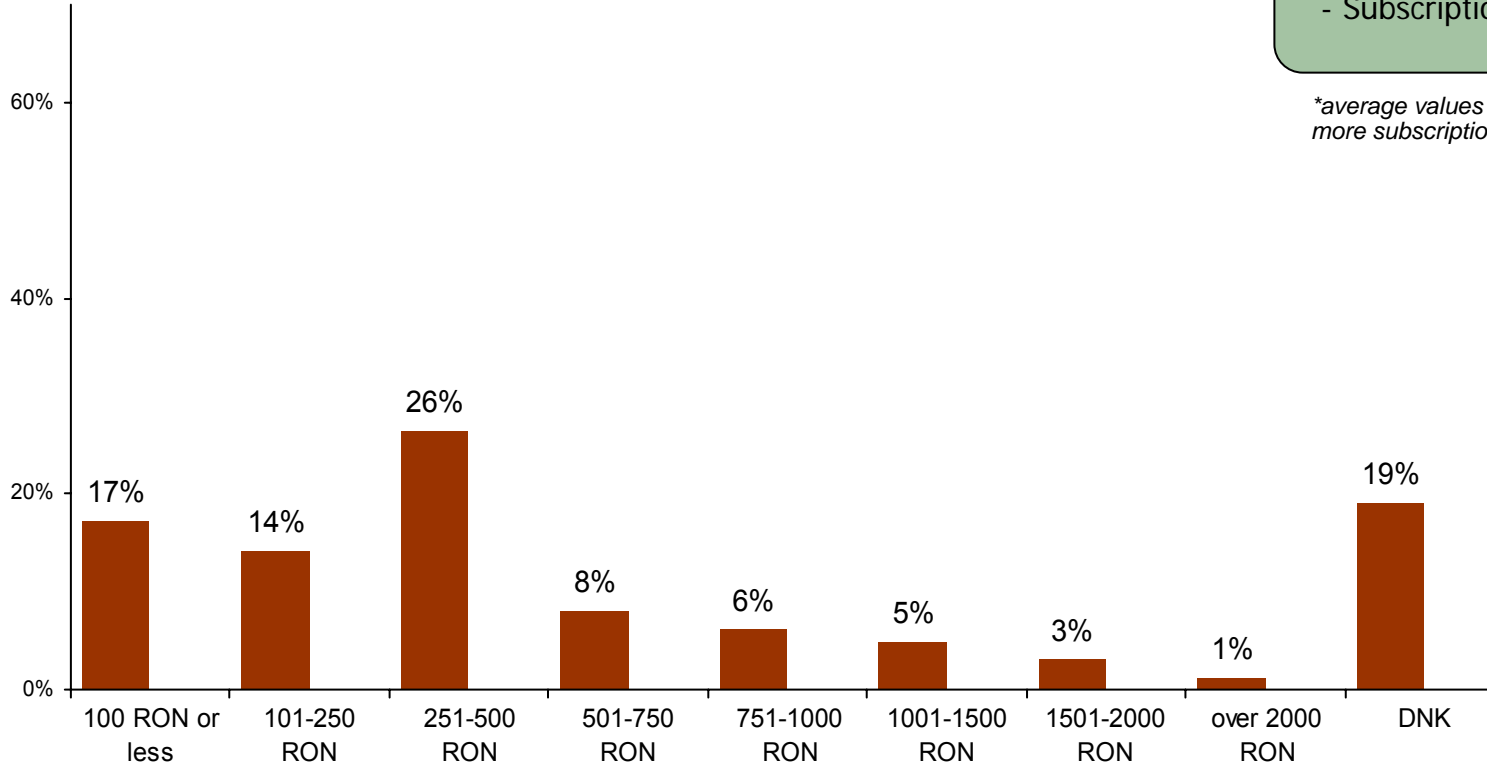
What is the approximate monthly cost of subscription services for employees from each supplier on an average month (including VAT)?

Reference: companies and institutions which use Zapp mobile telephony services

(N = 163)

Average cost of last month
- Subscriptions: **493,3 RON**

**average values per company; a company can have more subscriptions/pre-paid cards*



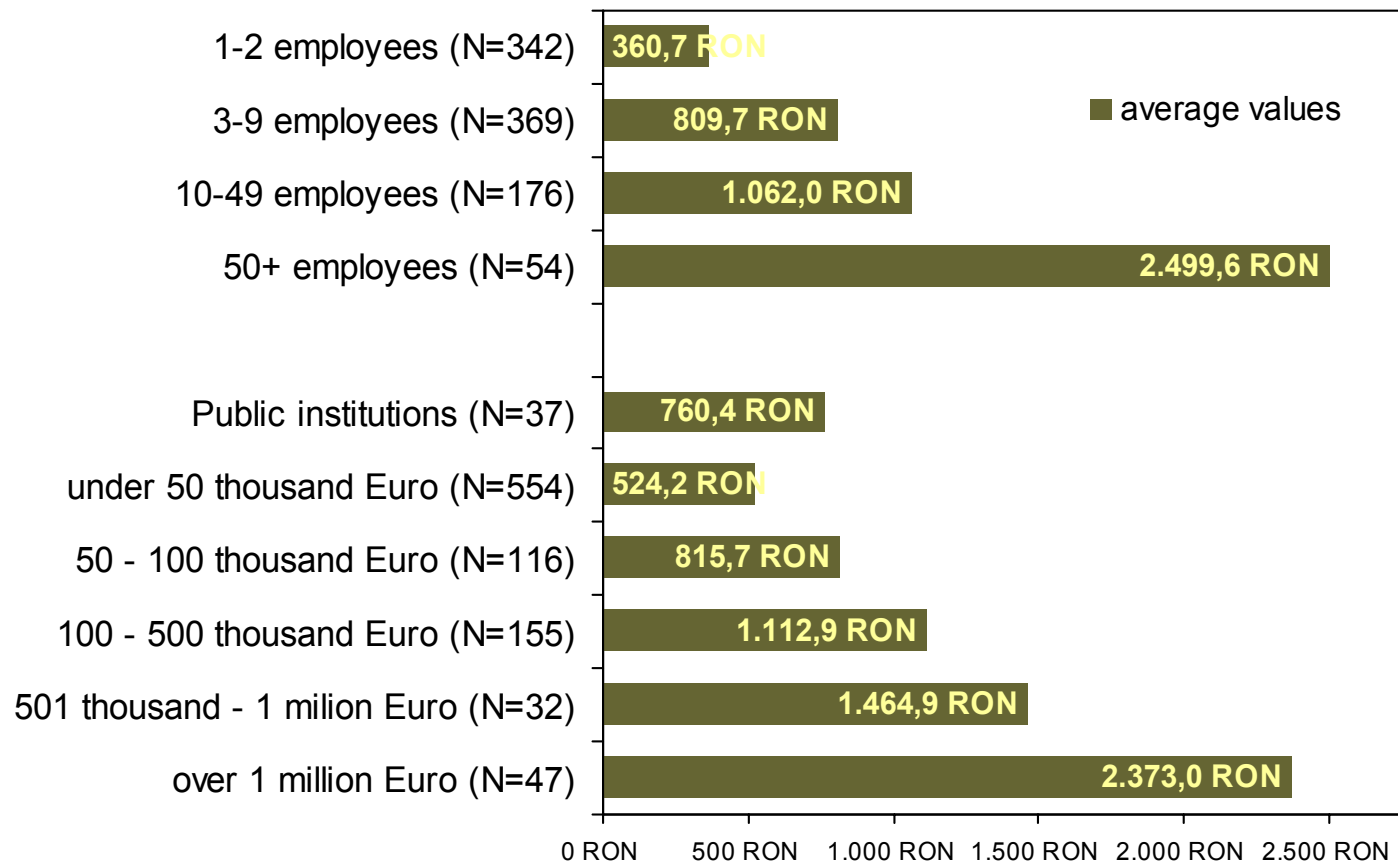
Last Month Average Cost of Subscriptions for Mobile Telephony per Size of Company and Revenue

What is the approximate monthly cost of subscription services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use subscriptions for mobile telephony services

No. employees

Revenue in
2005

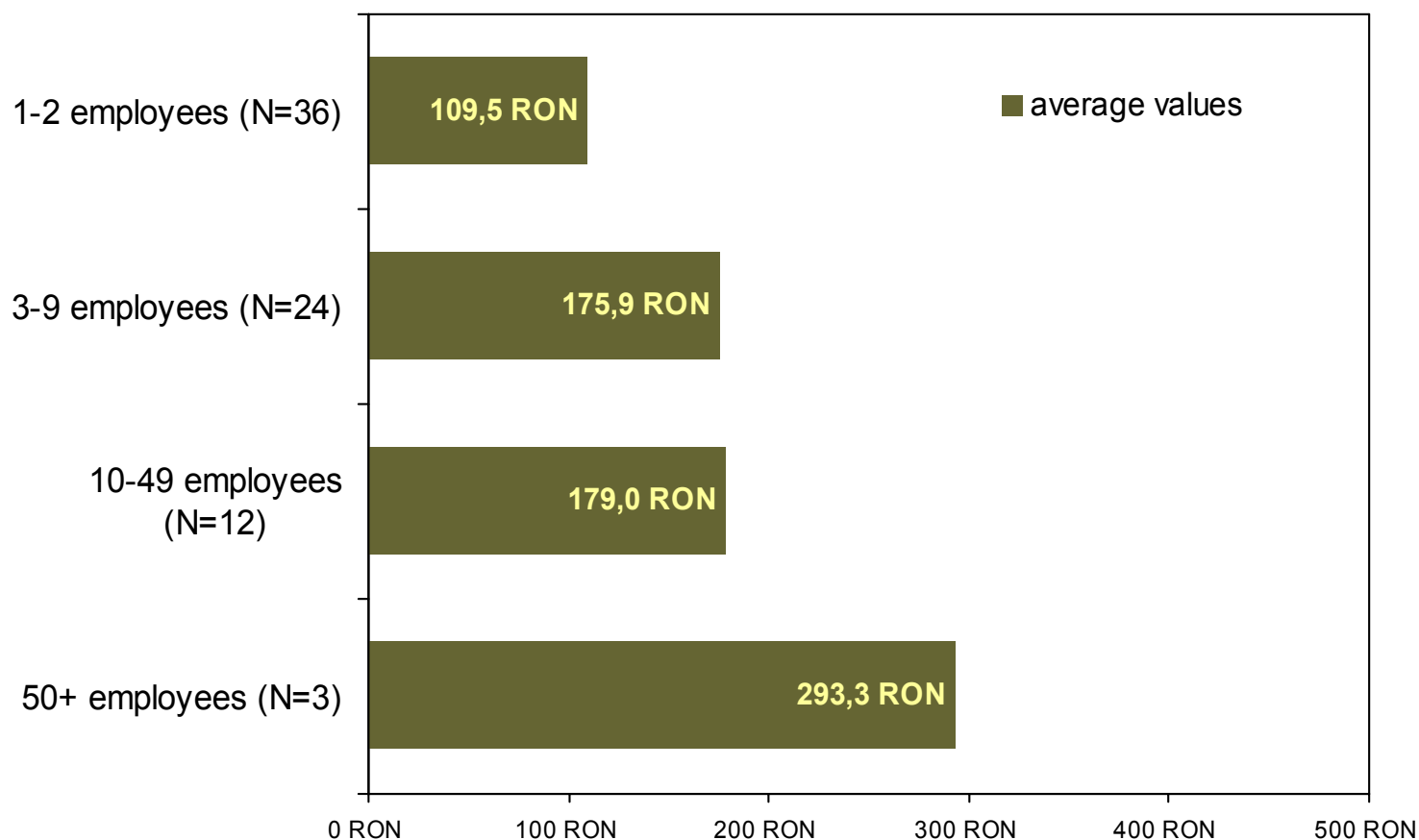


*135 people did not indicate amount company spends on subscriptions

Last Month Average Cost of Pre-paid Cards for Mobile Telephony

What is the approximate monthly cost of pre-paid card services from each supplier on an average month (including VAT)?

Reference: companies and institutions which use pre-paid cards for mobile telephony services



*48 people did not specify the amount company spends on pre-paid cards

Distribution of Monthly Costs of Calls per Type of Network Called (mobile or fixed)

What is the approximate percentage of mobile to mobile and mobile to fixed call costs out of total monthly cost of mobile telephony services?

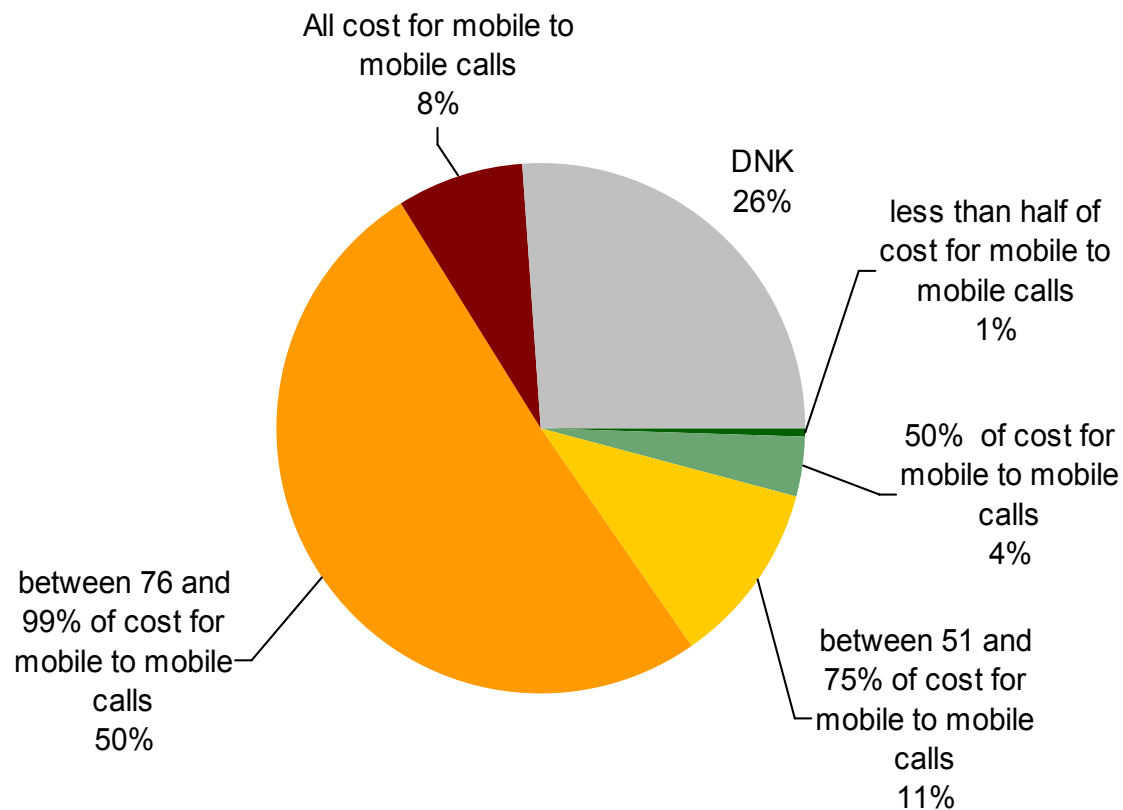
Reference: companies and institutions which use mobile telephony services, N = 1124

Average values

84% of cost for mobile to mobile calls

16% of cost for mobile to fixed calls

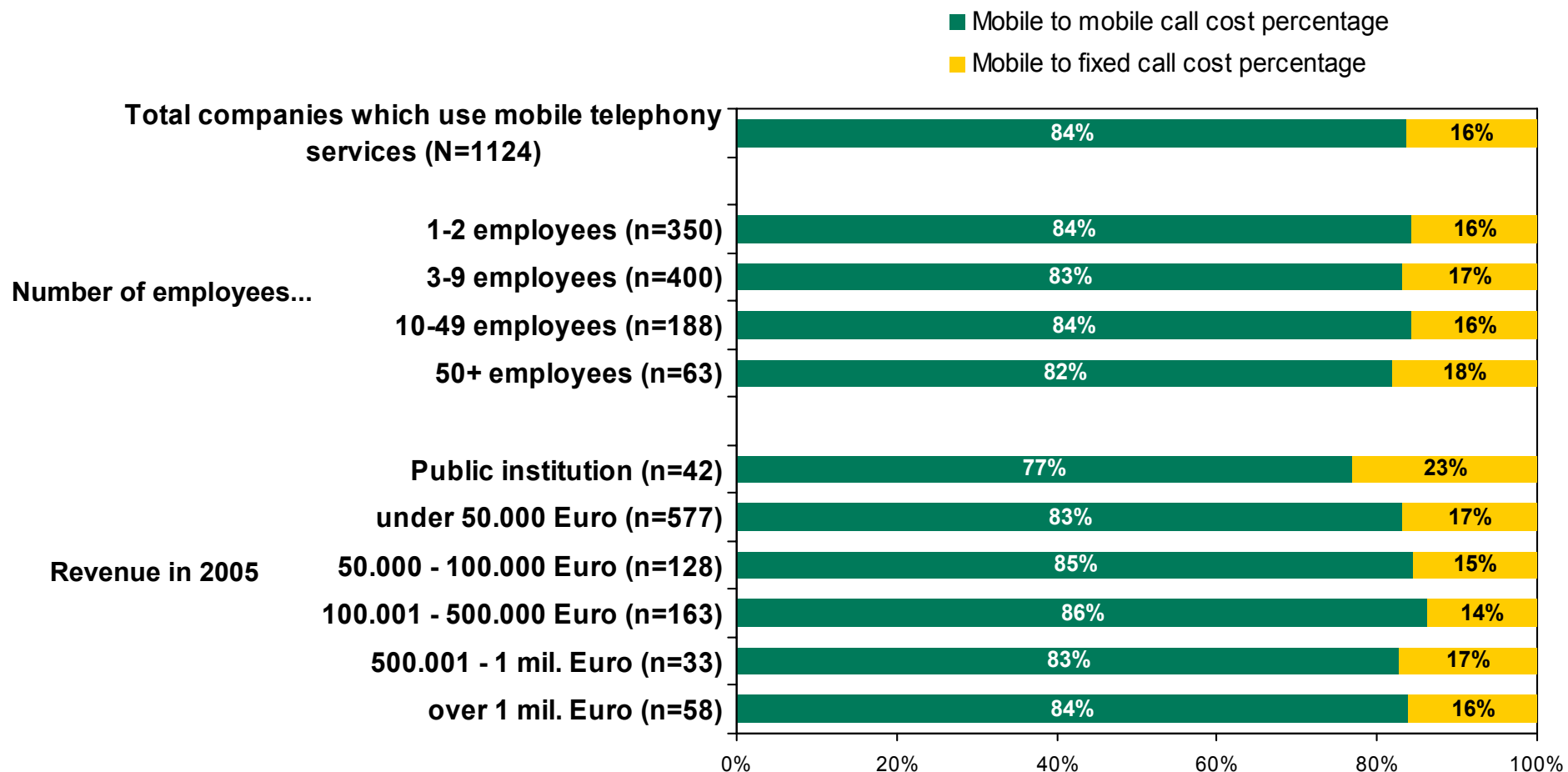
100% - Total call cost



Distribution of Monthly Costs of Calls per Type of Network Called (mobile or fixed)

What is the approximate percentage of mobile to mobile and mobile to fixed call costs out of total monthly cost of mobile telephony services?

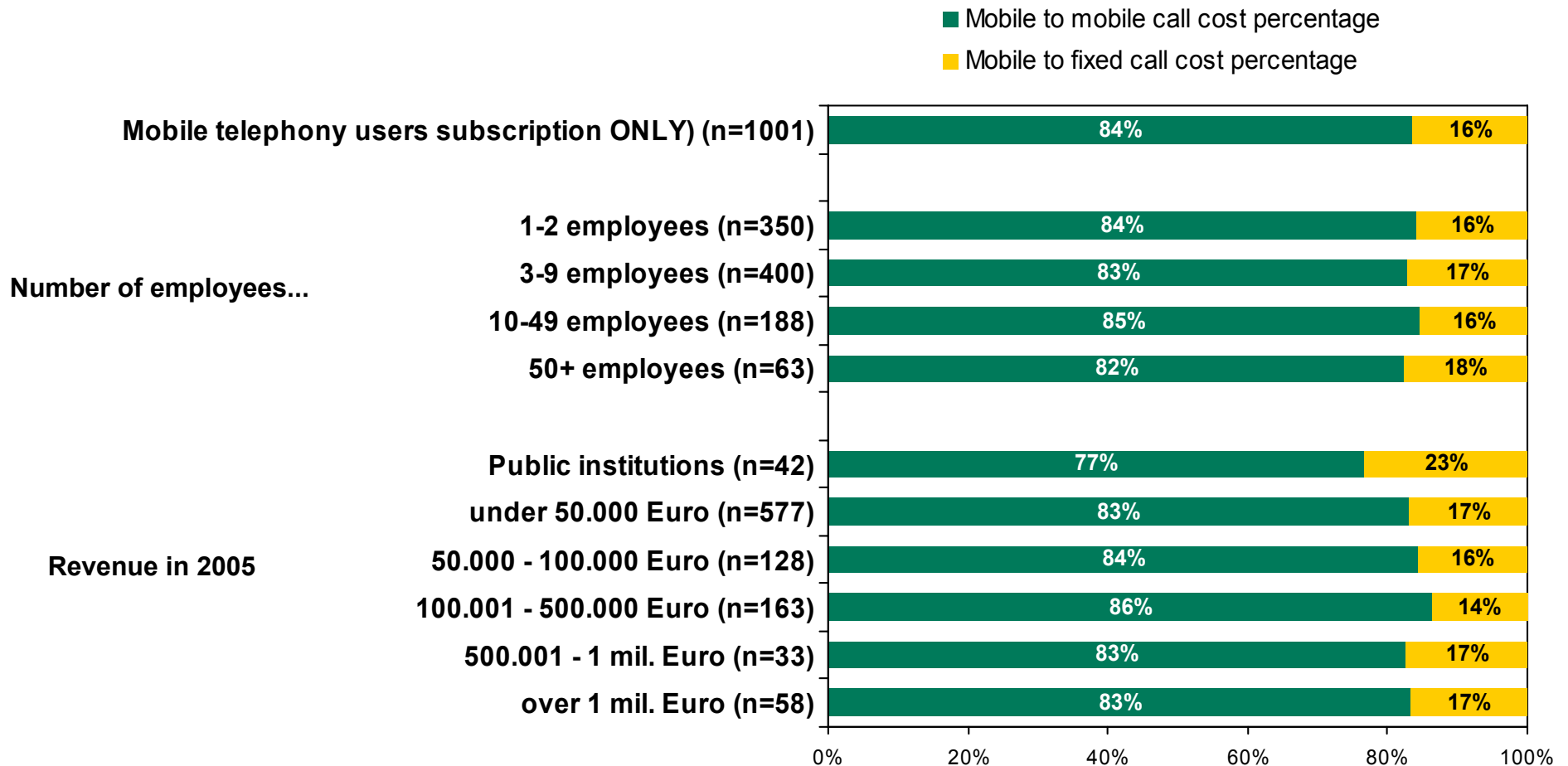
Reference: companies and institutions which use mobile telephony services, per total, per number of employees and per revenue



Distribution of Monthly Costs of Calls per Type of Network Called – Companies and Institutions Which Use Subscriptions Only

What is the approximate percentage of mobile to mobile and mobile to fixed call costs out of total monthly cost of mobile telephony services?

Reference: companies and institutions which use mobile telephony services with subscription ONLY, per total, number of employees and revenue



V. Mobile Telephony Consumption Policies

Mobile Telephony Consumption Policies

- Generally speaking, 37% of employees of companies and institutions have access to a mobile service, but only in 60% of companies and institutions all employees use this service; in 21% of them less than half of employees use the service. The situation differs per size of company. The percentage of employees with mobile phone access paid by company/institution decreases when number of employees increases, from 94% for companies and institutions with 1 or 2 employees to 28% for companies and institutions with over 50 employees. In 63% of companies and institutions with over 50 employees, less than a quarter of employees have access to a mobile service.
- 62% of companies and institutions do not enforce any restriction or recommendation regarding the usage of mobile phones, while only 14% enforce such restrictions. The percentage of companies and institutions that enforce restrictions increases per size of company/institution, from 6% for those with 1 or 2 employees to 44% in those with over 50 employees.
- Main restrictions enforced for employees, both managerial and non-managerial, are related to international calls by restricting the amount or the number of minutes included in the type of subscription. There is a difference if company enforces restrictions per status of employee. About 40% of companies enforce such restrictions for non-managerial employees, and only 16% have them for managerial employees. The percentage of companies that enforce restrictions only to non-managerial employees is 41%.

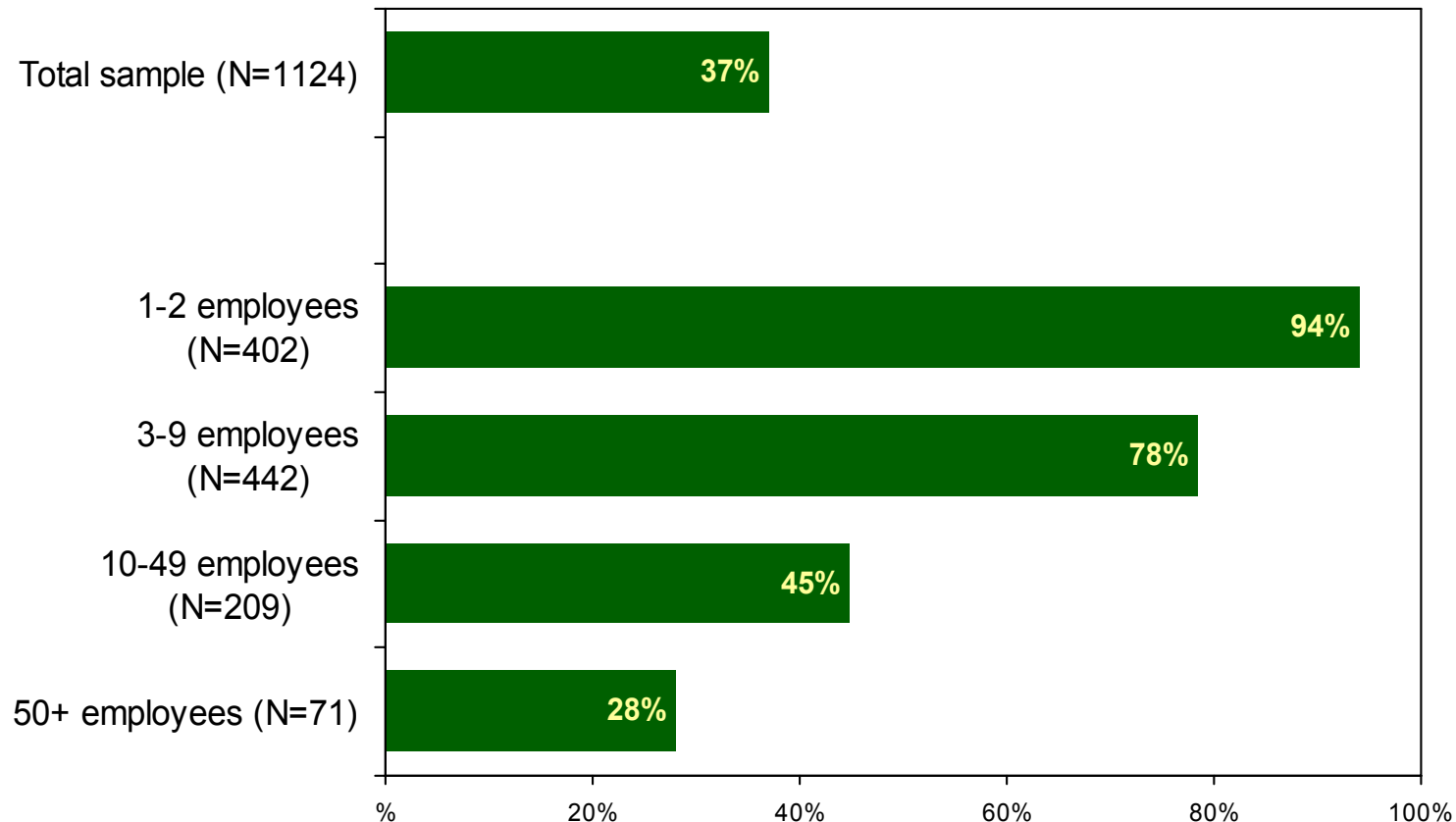
Mobile Telephony Consumption Policies

- If such restrictions are enforced for mobile calls, employees have the alternative to use fixed lines in 48% of companies and institutions. However, 41% of companies do not offer any alternative to employees when they enforce restrictions to mobile phone usage.
- If employees can use either fixed or mobile lines in the company, 35% of those companies declare that employees tend to use mobile phones more, even if they have access to fixed line; 22% of companies declare that employees would use mobile phone less and only 18% do not use mobile phones in the above situation.

Percentage Employees with Access to Mobile Telephony per Total Number of Employees

Overall, what is the percentage of company employees that have access to mobile lines?

Reference: companies and institutions which use mobile telephony services, per total and size of company

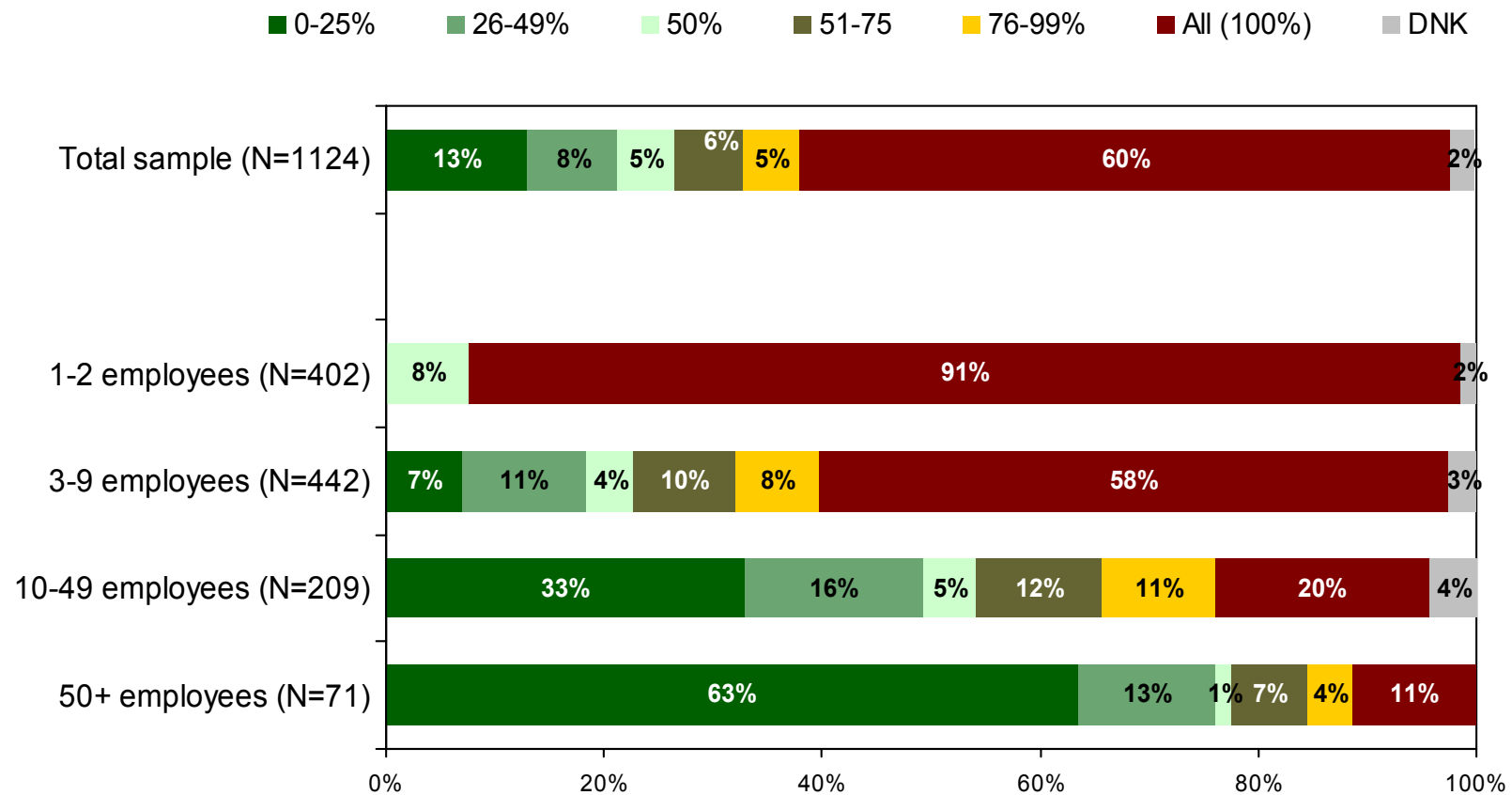


*Percentage was calculated as total number of employees with mobile phone access per total number of employees in the sample

Percentage Employees with Access to Mobile Telephony per Total Number of Employees

Overall, what is the percentage of company employees who have access to mobile lines?

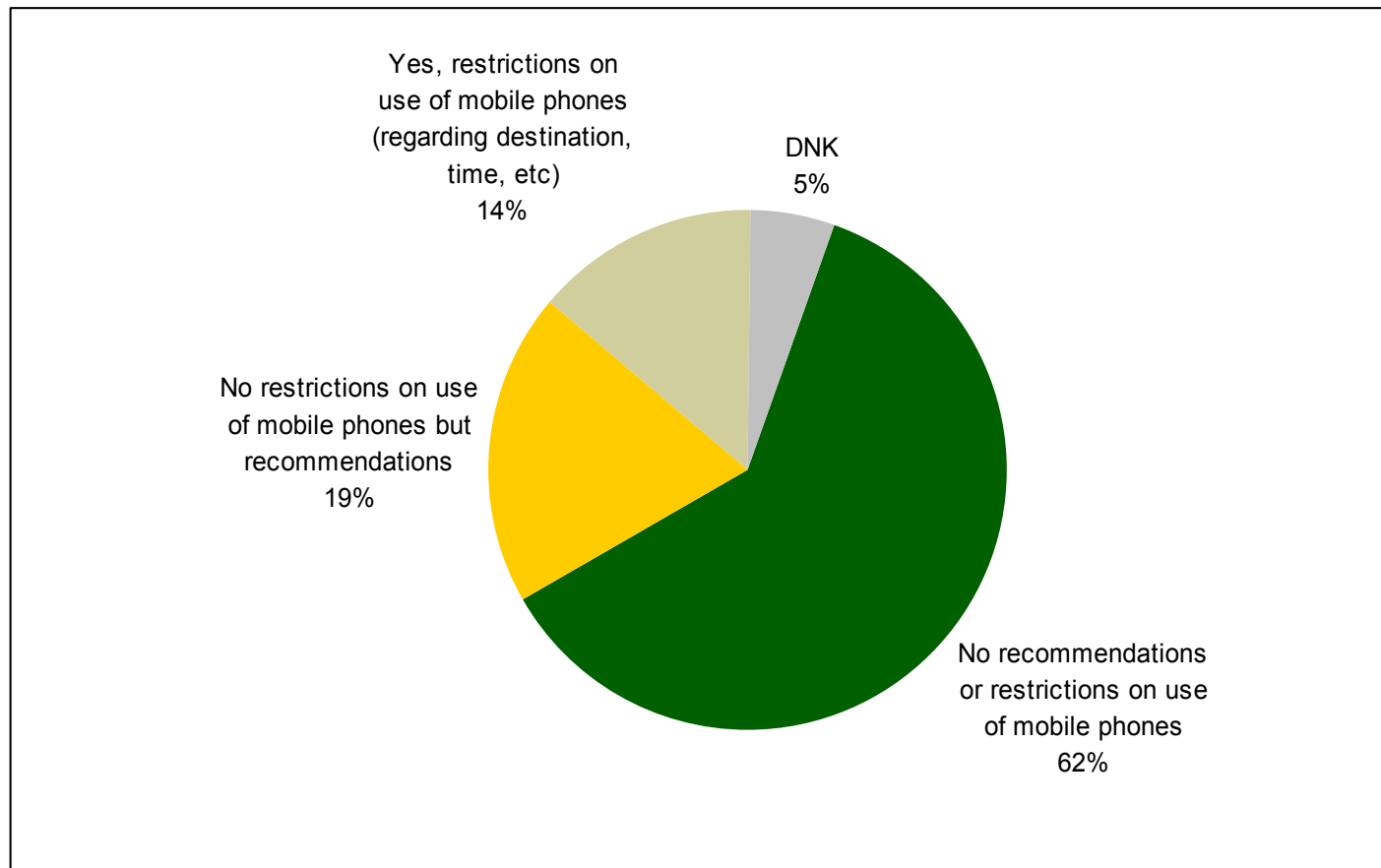
Reference: companies and institutions which use mobile telephony services, per total and size of company



Company Policies on Mobile Telephony Usage Restrictions

Which of the following statements best describes your company's policy regarding use of mobile phones?

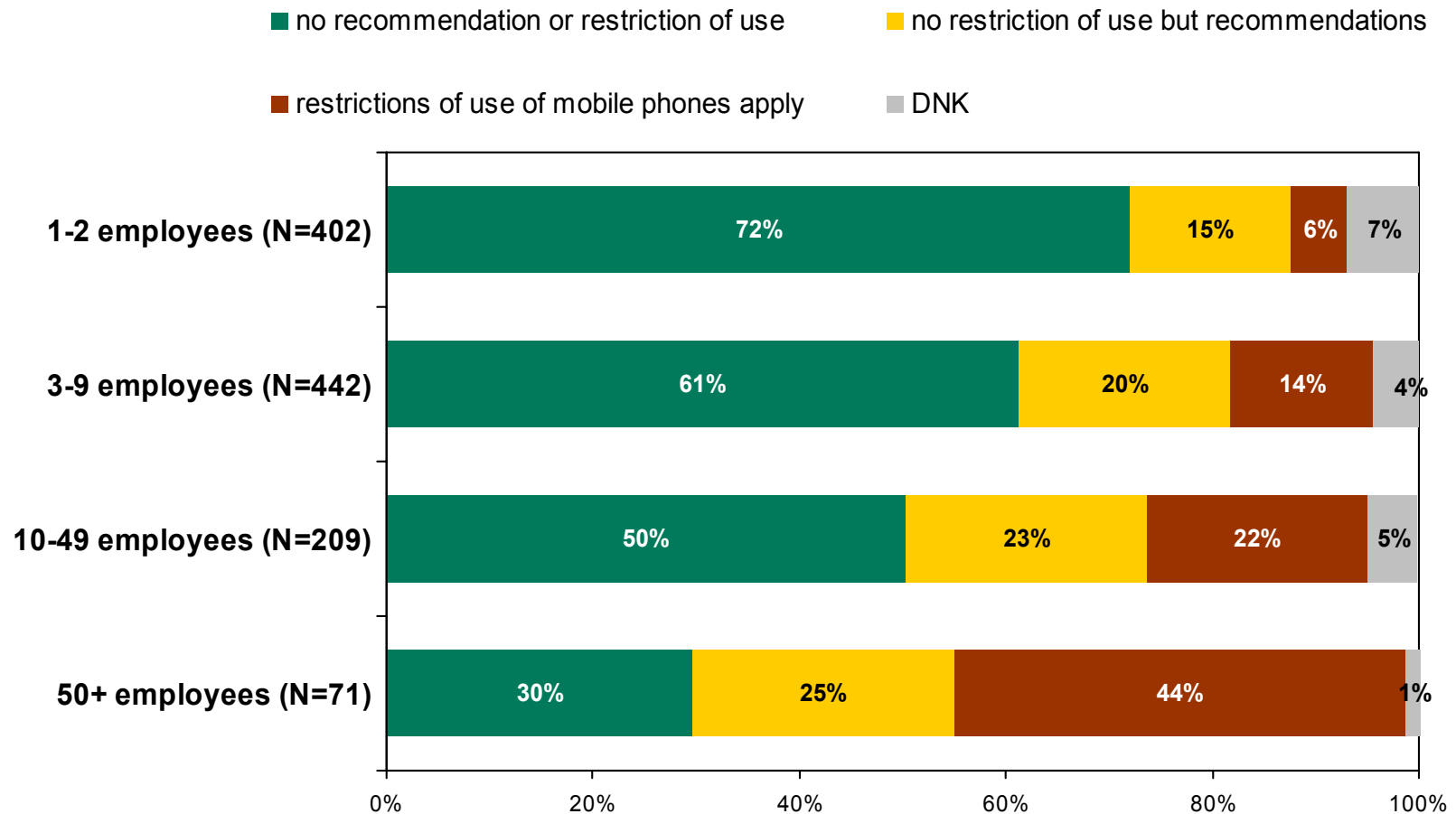
Reference: companies and institutions which use mobile telephony services, N = 1124



Usage Restrictions for Mobile Phones

per size of company and institution

Which of the following statements best describes your company's policy regarding use of mobile phones?

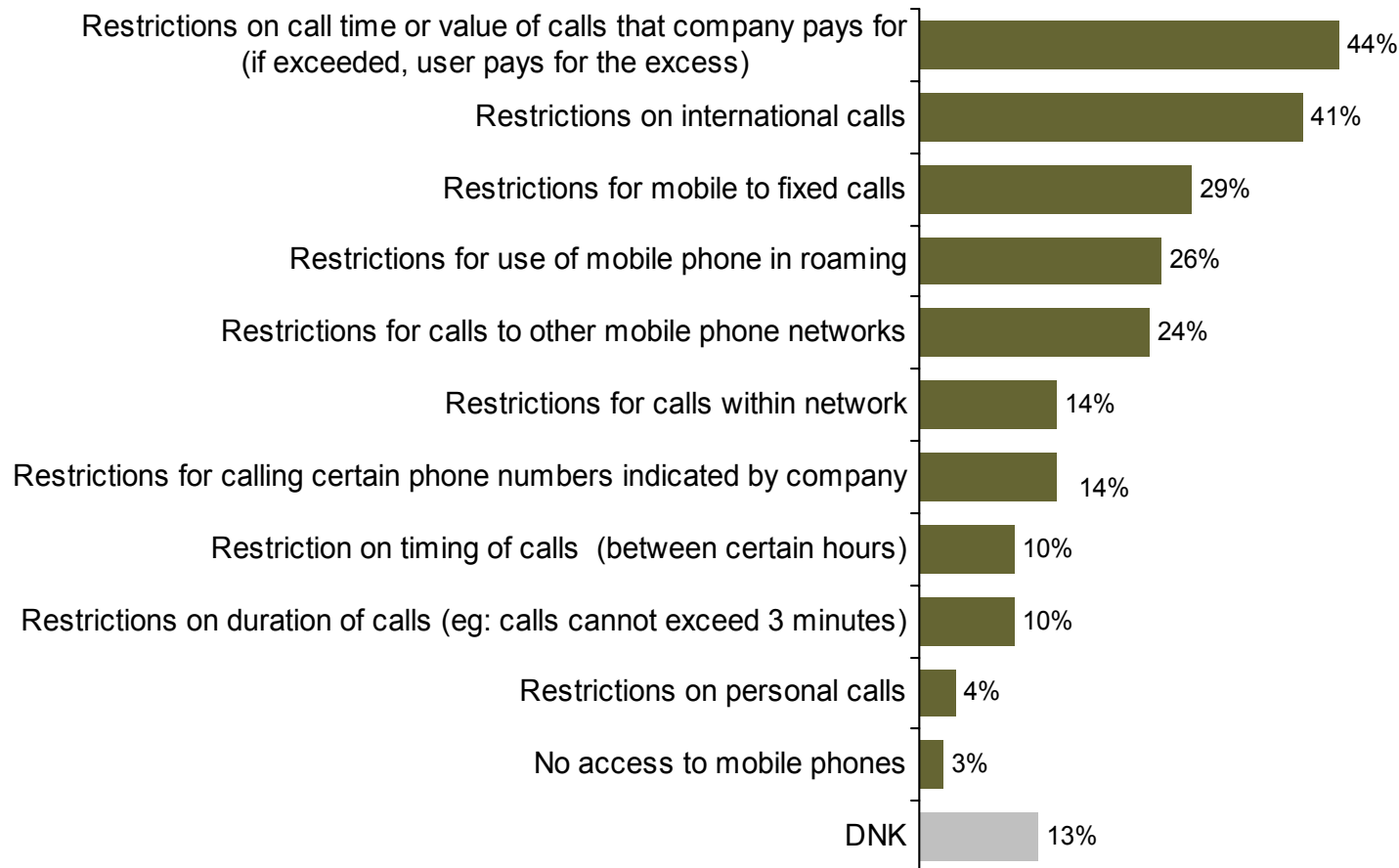


One single answer

Usage Restrictions for Mobile Phones for Non-managerial Employees

What type of restrictions does your company enforce for use of mobile phone by non-managerial employees?

Reference: companies and institutions which enforce mobile phone use restrictions, N = 160

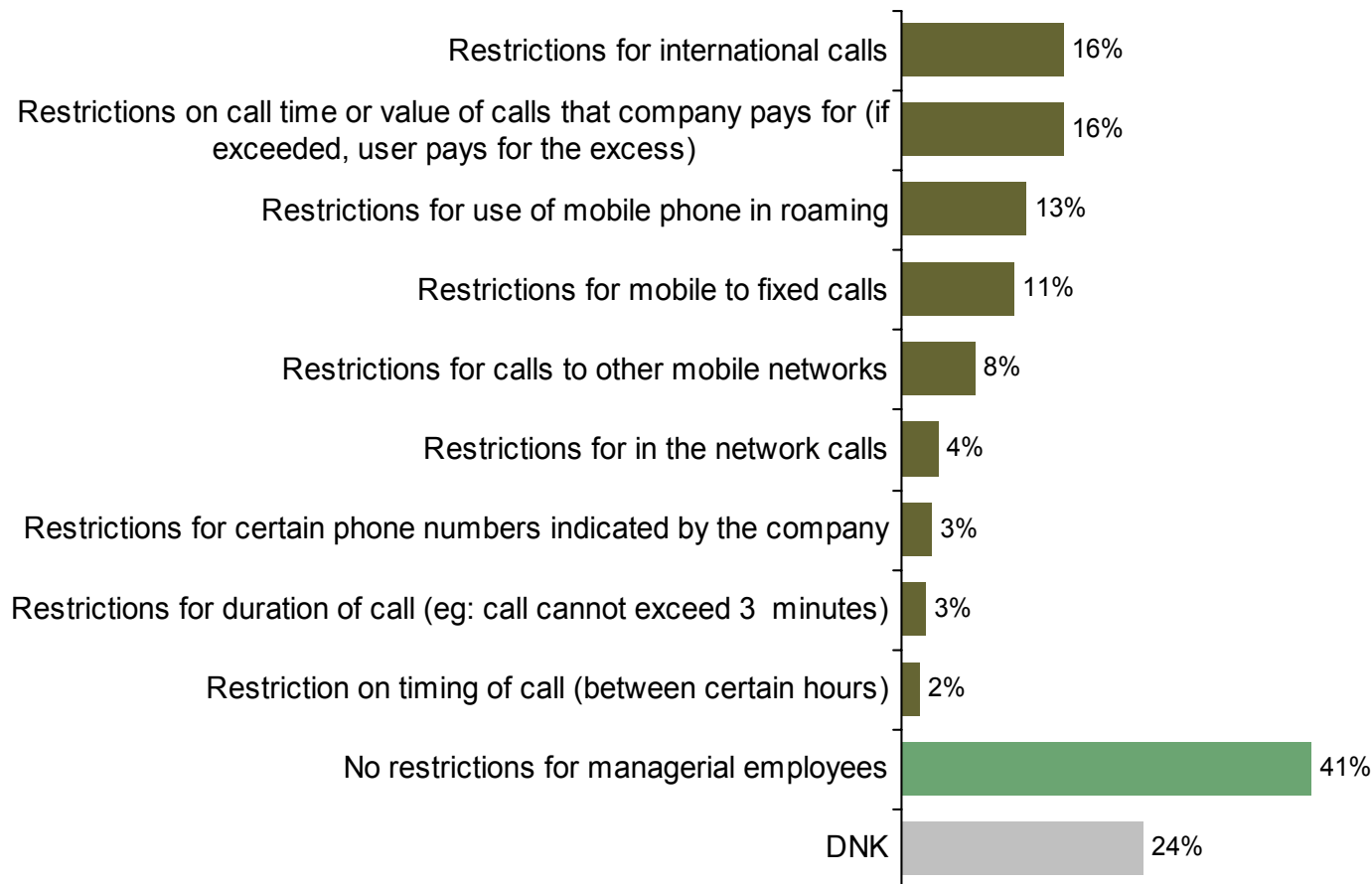


More than one answer

Usage Restrictions for Mobile Phones for Managerial Employees

What type of restrictions does your company enforce for use of mobile phone by managerial employees?

Reference: companies and institutions which enforce mobile phone use restrictions, N = 160

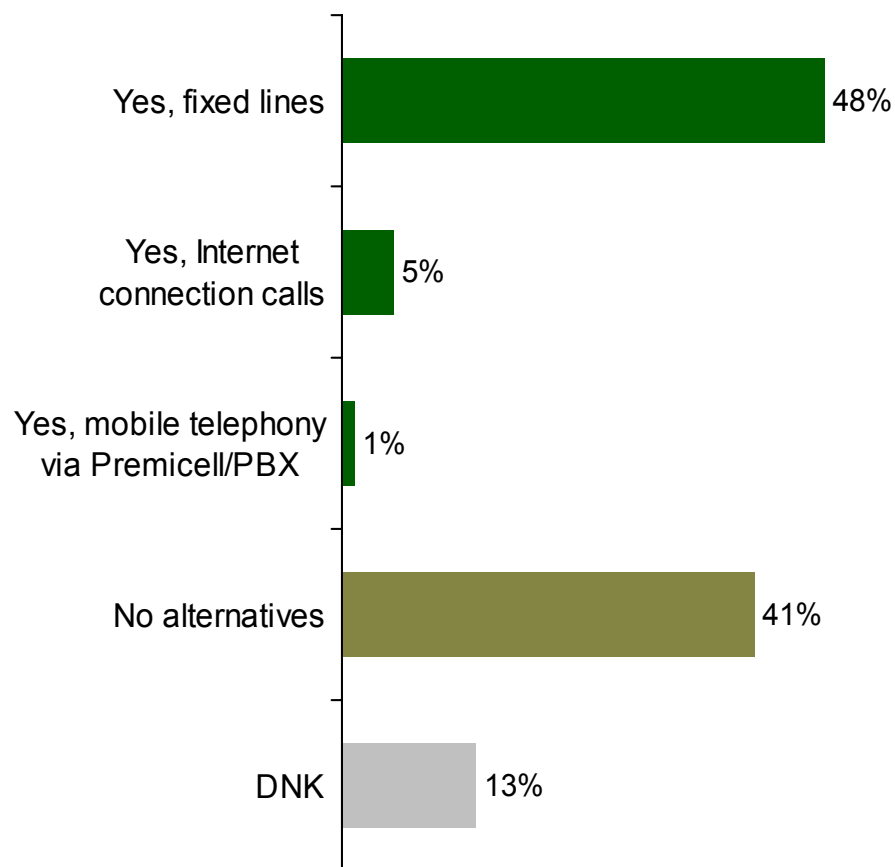


More than one answer

How Companies Replace the Mobile Restricted Service for Employees

Do employees who have restrictions for certain mobile calls (regarding destination, time or value) have other alternatives to make those calls?

Reference: companies and institutions which enforce mobile phone use restrictions, N = 160

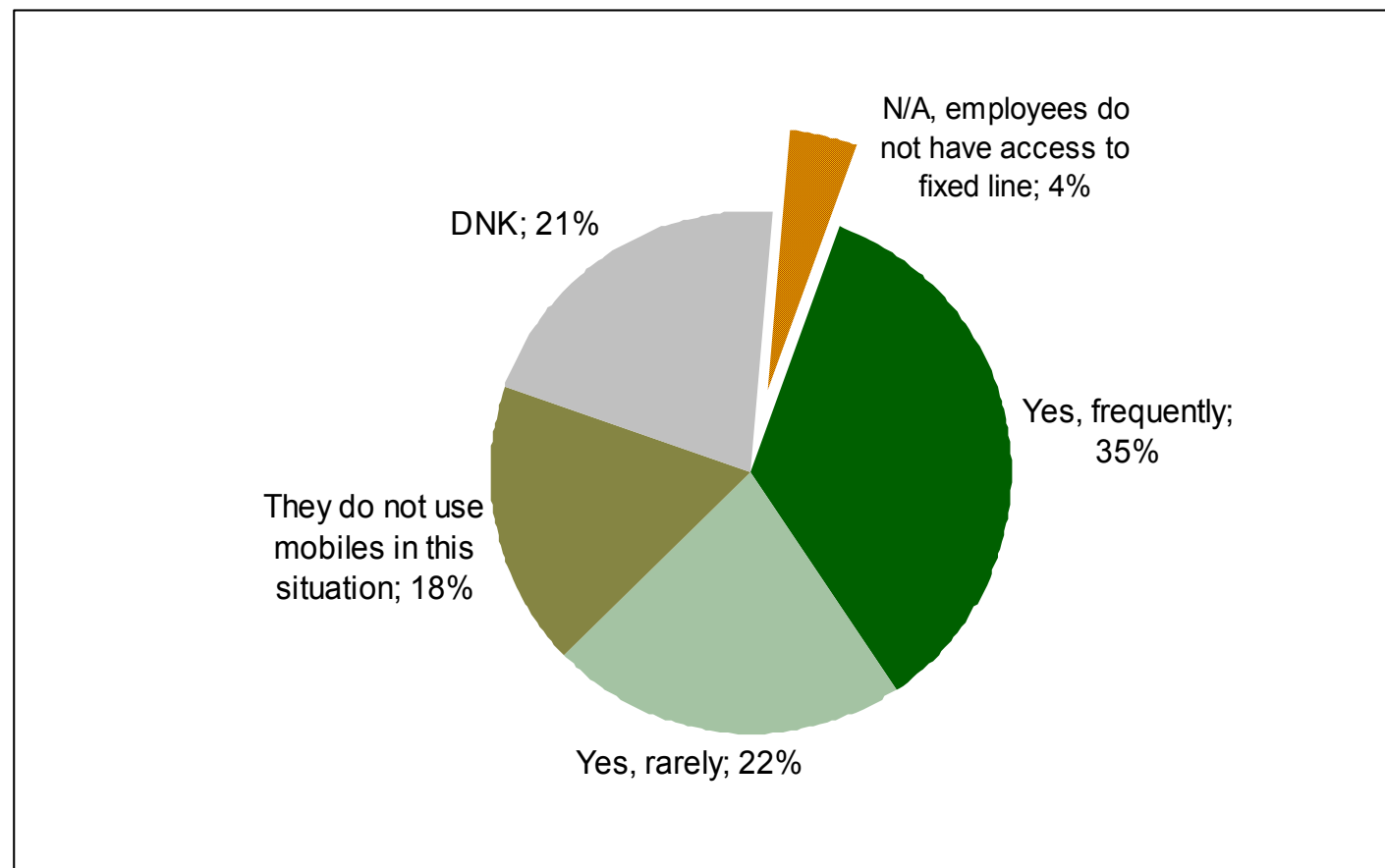


More than one answer

How Employees Use Mobile Phones When They Have Access to a Fixed Line

When employees are in the office or inside the company/institution and have access to a fixed line, do they use their paid for mobile phones to make calls?

Reference: companies and institutions which use mobile telephony services, N = 1124



VI. Purpose of Mobile Telephony Consumption

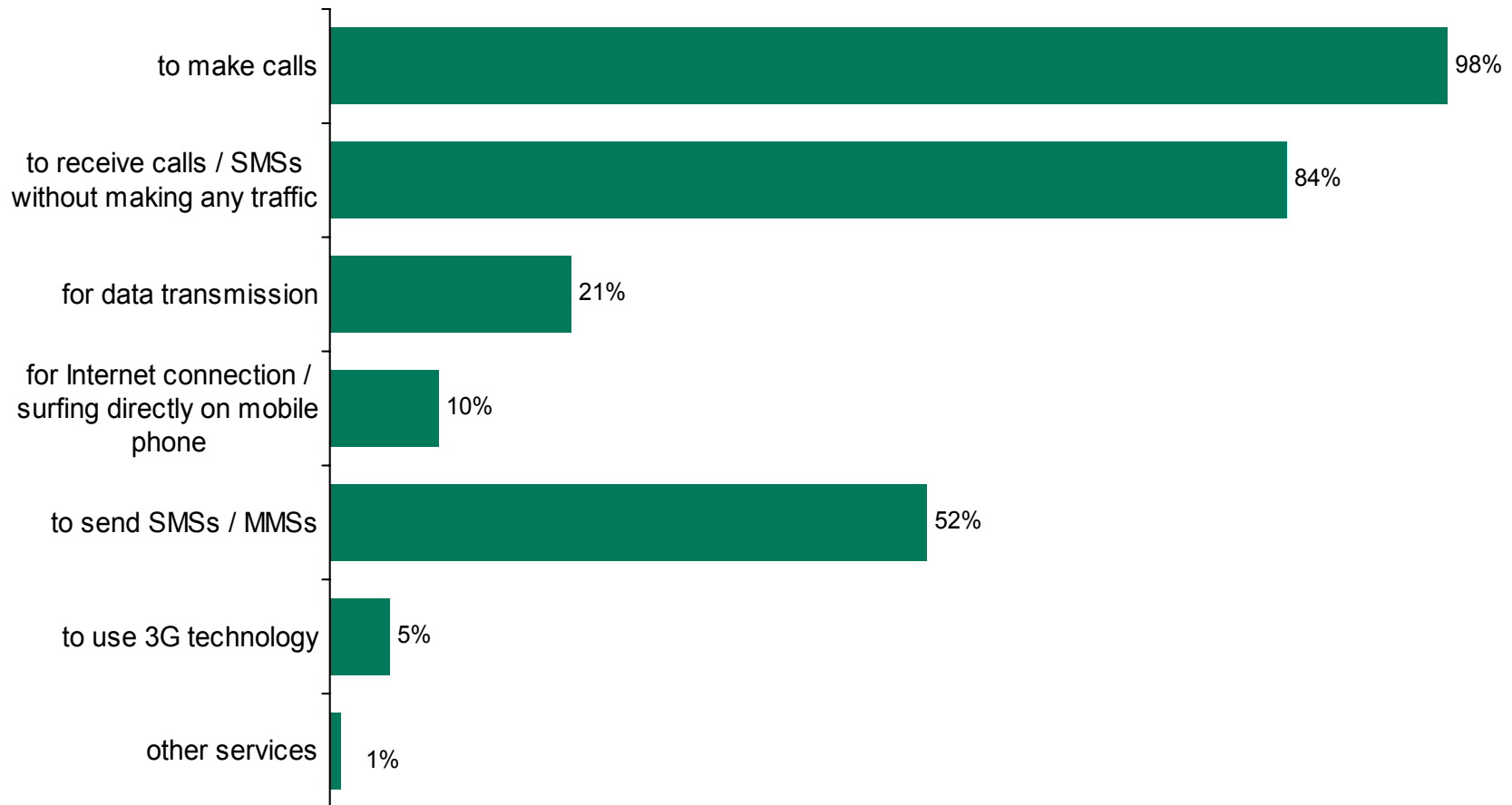
Purpose of Mobile Telephony Consumption

- While 98% of companies and institutions use mobile phones to make calls, 84% of companies have at least one SIM card only for receiving calls and SMSs excluding phone calls.
- 52% of companies use mobile phones to send SMSs or MMSs, 21% for data transmission and only 10% to surf internet via mobile connection. 5% of companies and institutions use 3G.
- Among companies and institutions which have more than one supplier of mobile telephony, Zapp is used especially for internet surfing directly on mobile phone and data transmission. Orange is slightly more used than Vodafone for sending SMSs.
- 37% of companies and institutions use mobile phones exclusively or almost exclusively for mobile to mobile calls, and 43% use mobile phones mostly for mobile in the network calls.
- Only 23% of companies and institutions use roaming at least once every 3 months and 30% use it only rarely. Almost 40% of companies never use it or enforce restrictions for roaming use.

Mobile Telephony Consumption

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD.

Reference: companies and institutions which use mobile telephony services, N = 1124

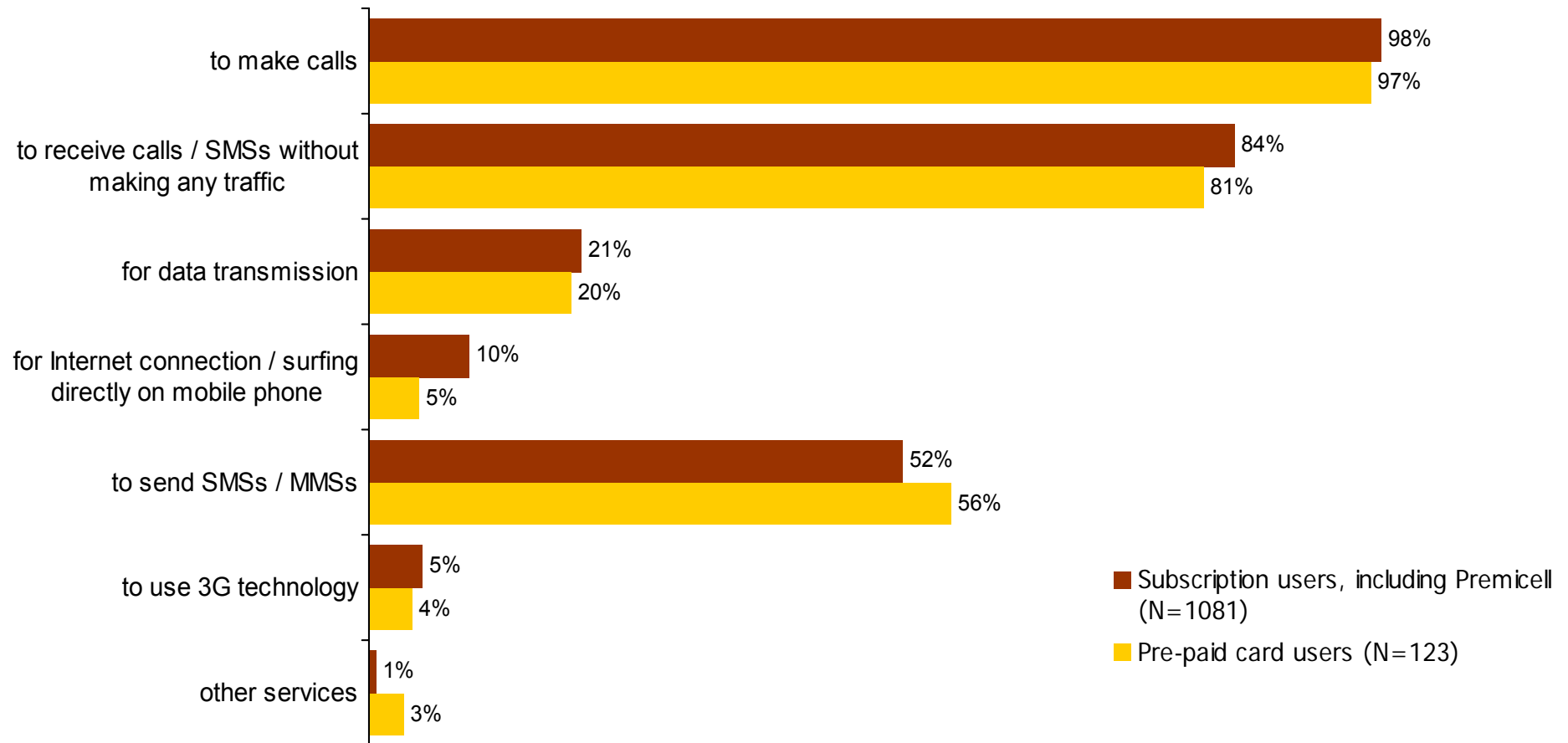


More than one answer

Mobile Telephony Consumption

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD.

Reference: companies and institutions which use mobile telephony services



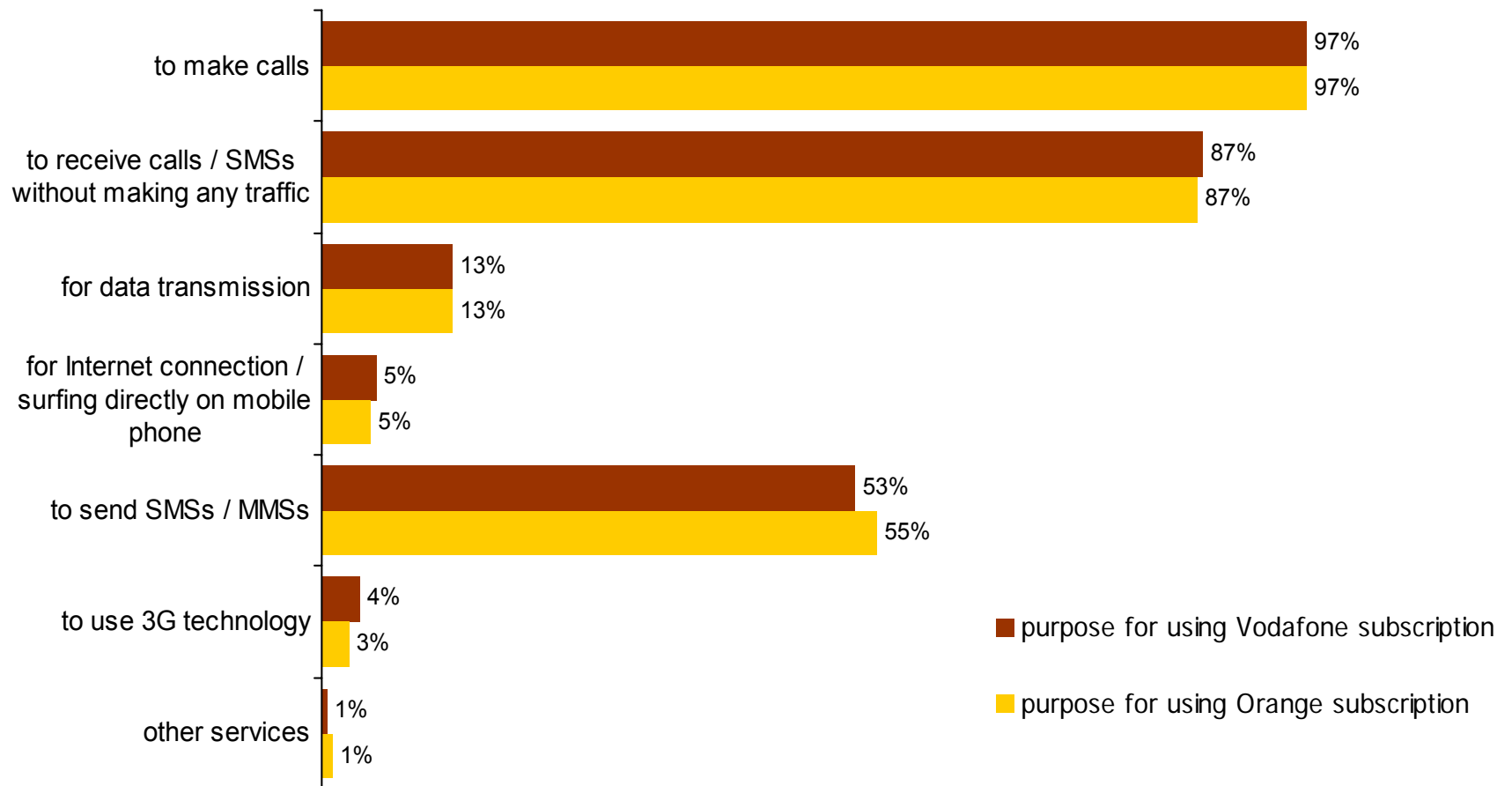
More than one answer

Mobile Telephony Consumption

- companies with both Orange and Vodafone subscriptions -

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION.

Reference: companies and institutions with both Orange and Vodafone subscriptions (N=186)



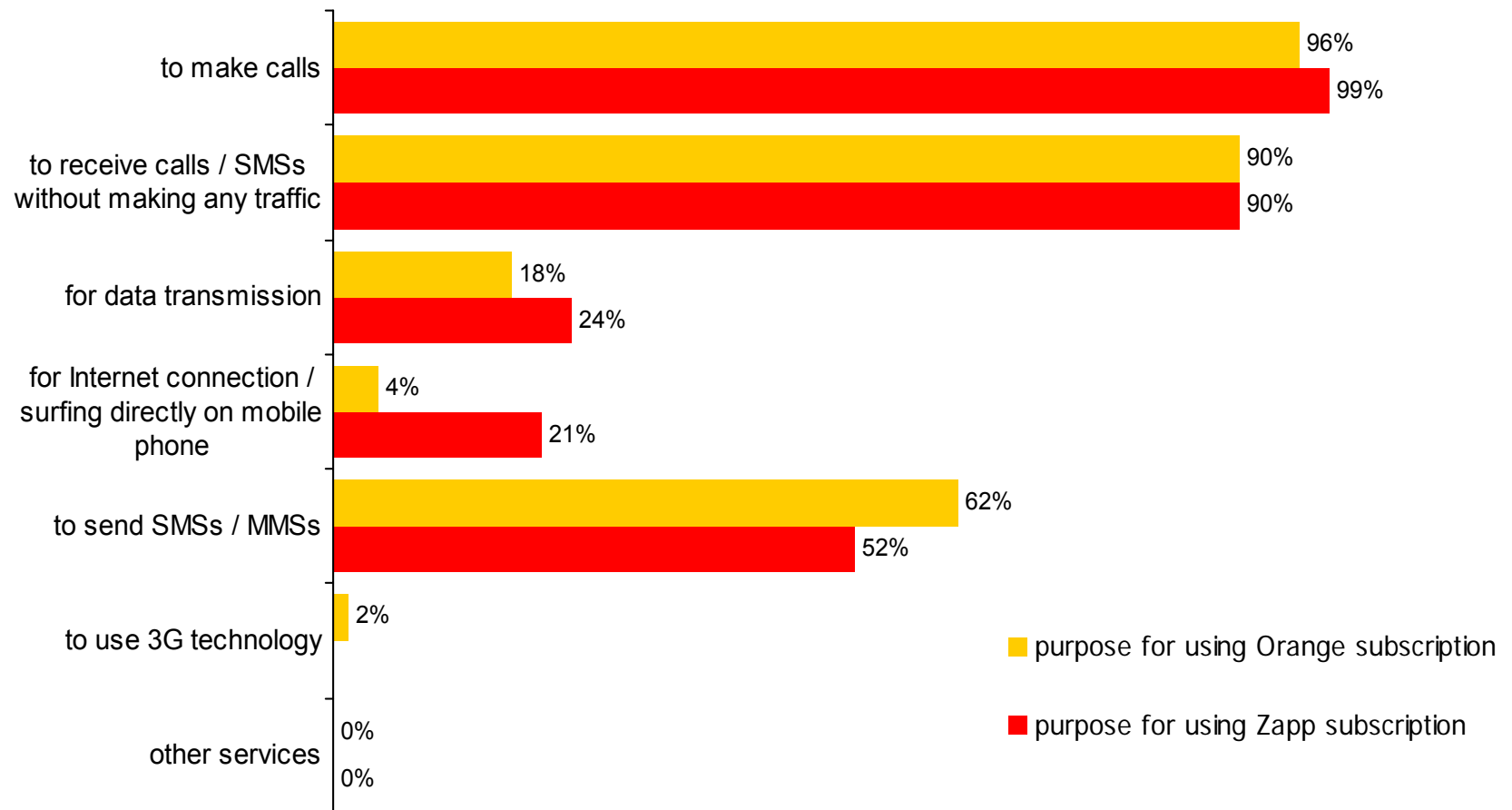
More than one answer

Mobile Telephony Consumption

- companies with both Orange and Vodafone subscriptions -

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION.

Reference: companies and institutions with both Orange and Zapp subscriptions (N=68)



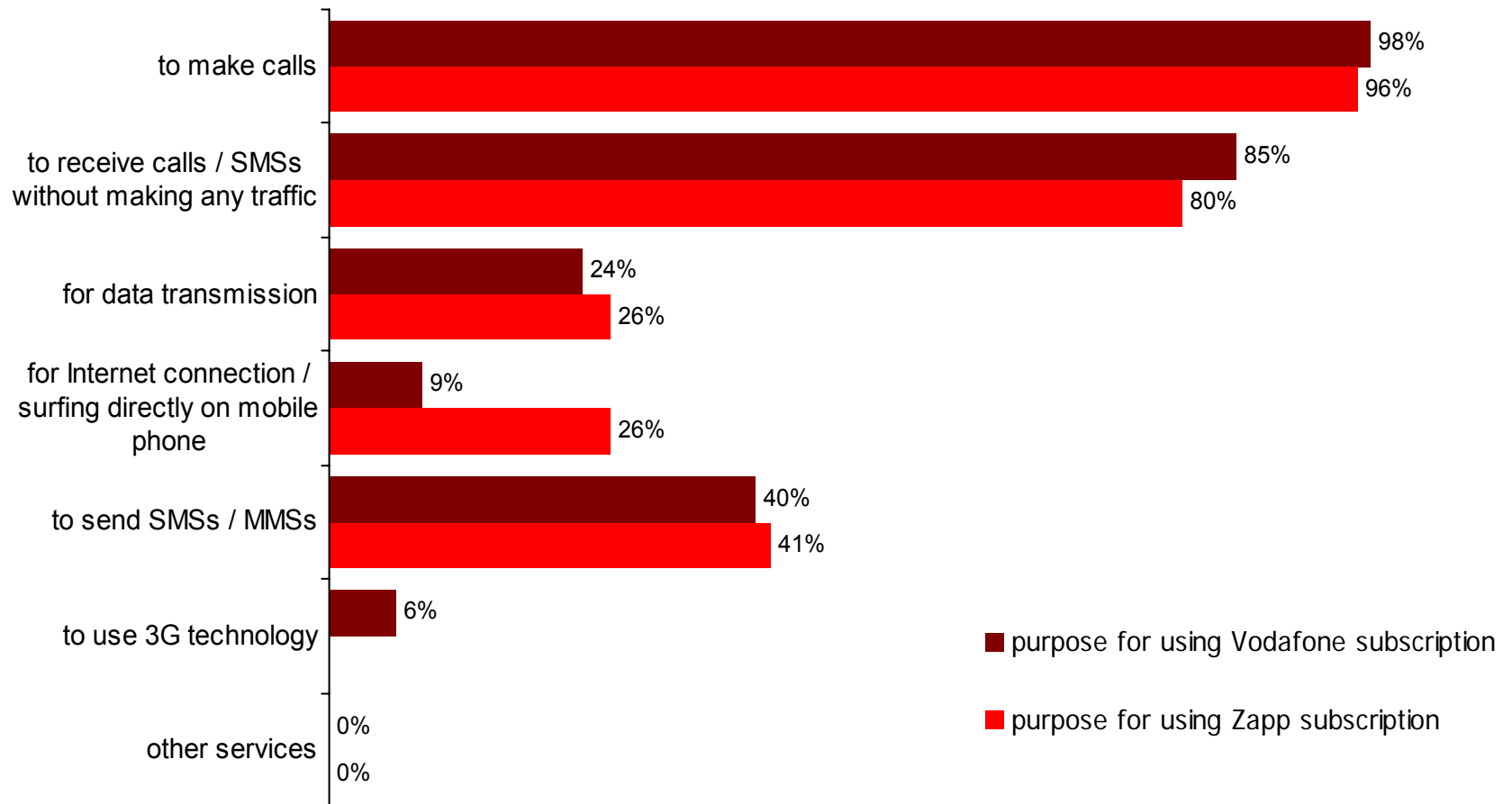
More than one answer

Mobile Telephony Consumption

- companies with both Vodafone and Zapp subscriptions -

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION.

Reference: companies and institutions with both Vodafone and Zapp subscriptions (N=80)



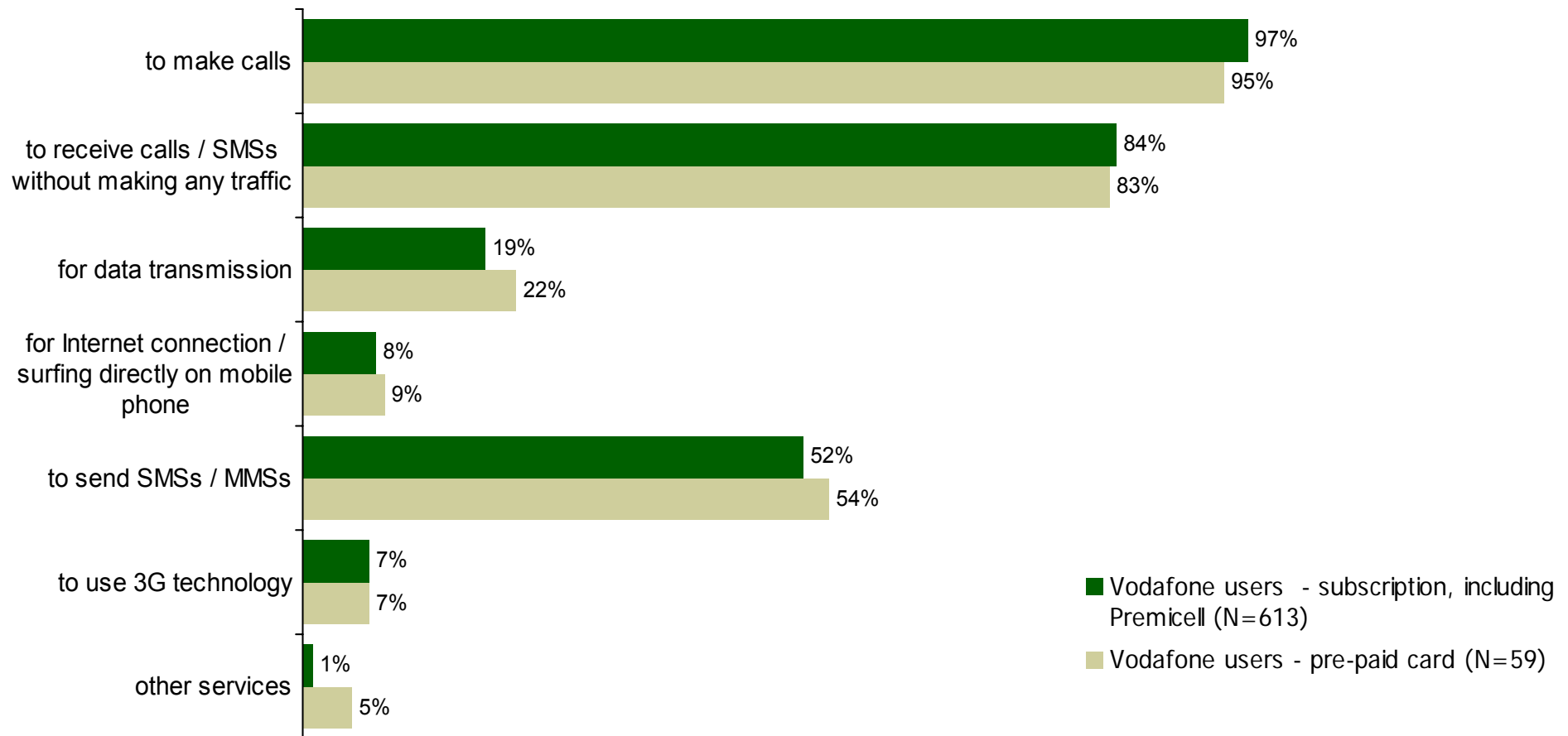
More than one answer

Mobile Telephony Consumption

Vodafone users

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD. You use your Vodafone phone for...

Reference: companies and institutions which use Vodafone mobile telephony services



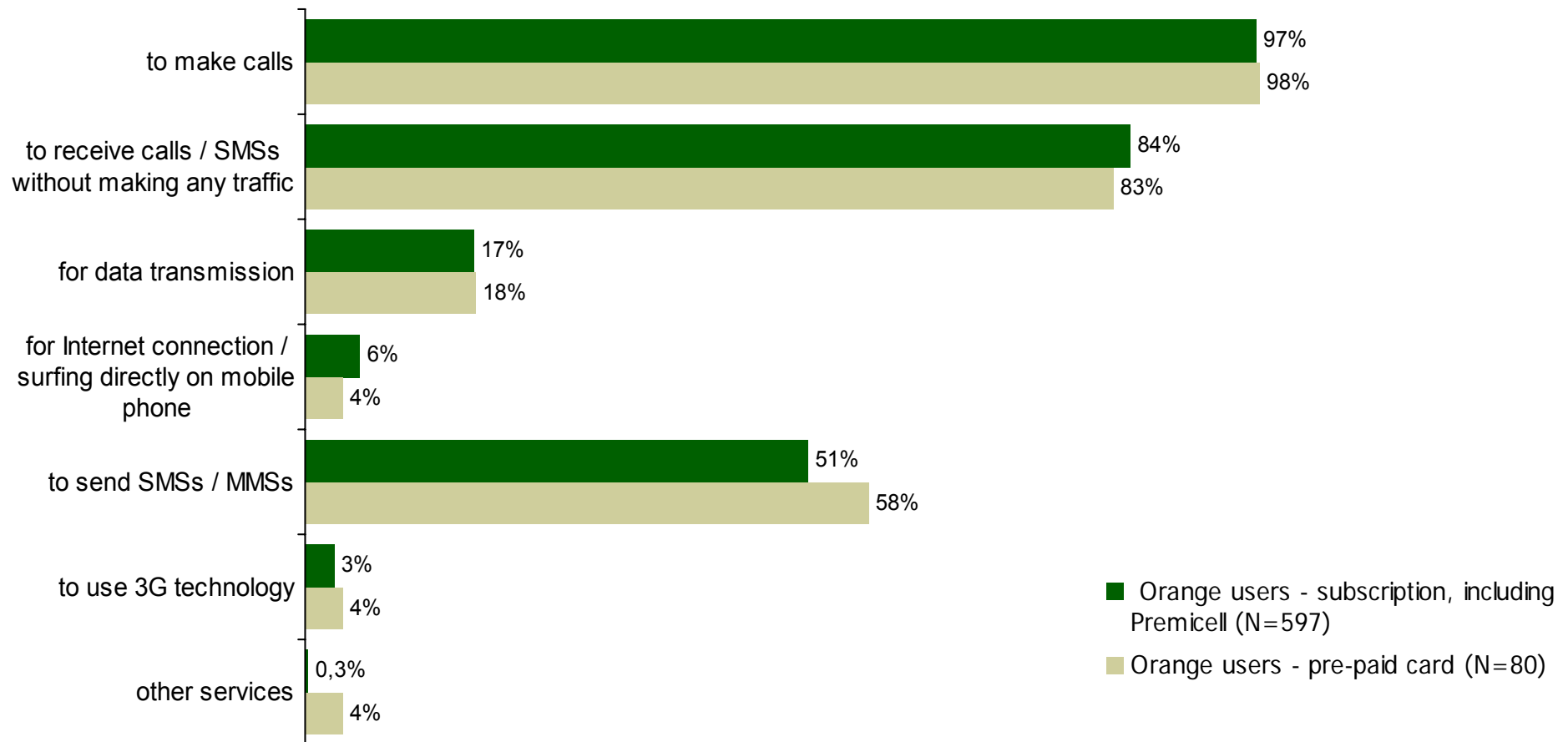
More than one answer

Mobile Telephony Consumption

Orange users

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD. You use your Orange phone for...

Reference: companies and institutions which use Orange mobile telephony services



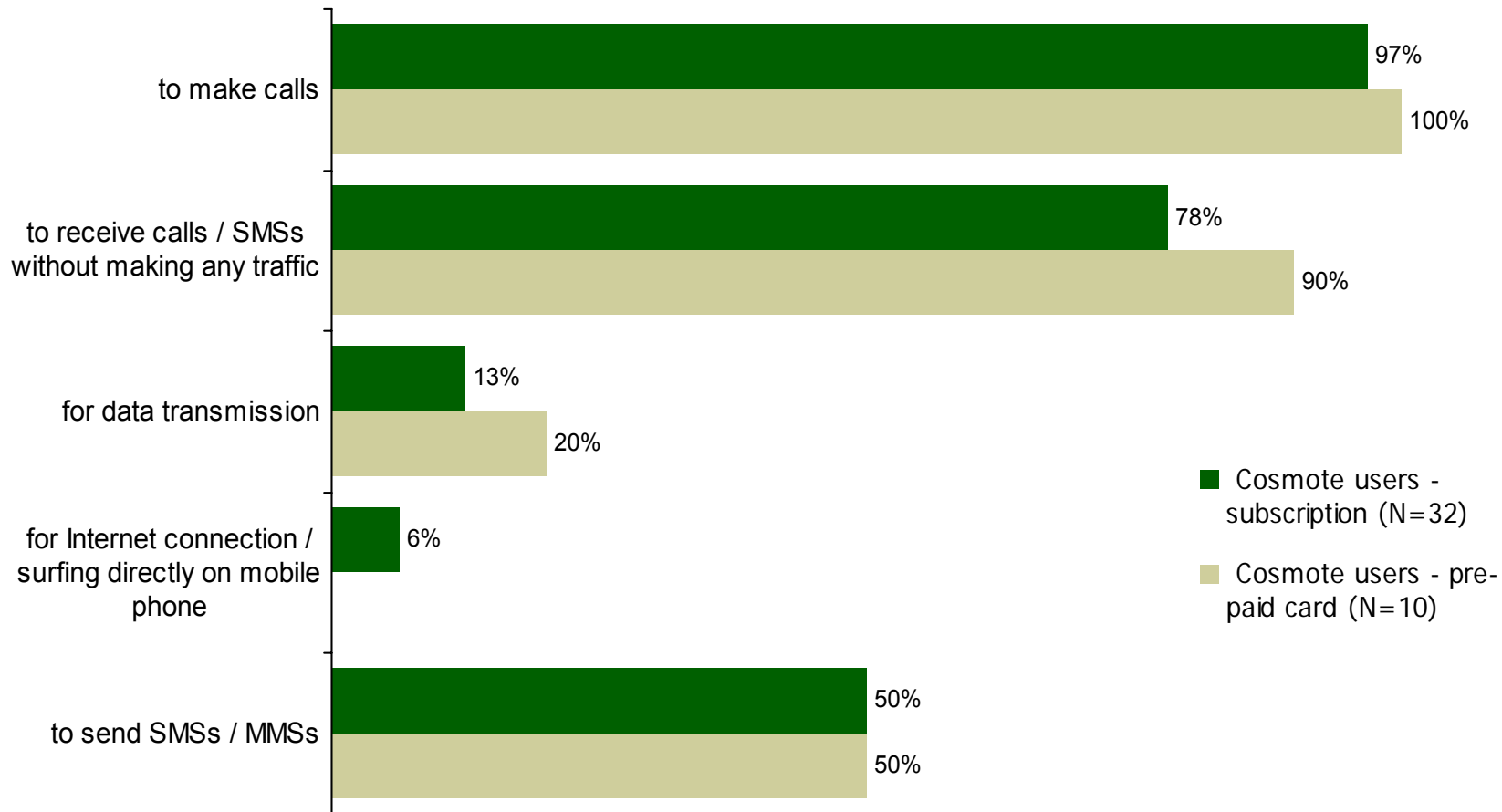
More than one answer

Mobile Telephony Consumption

Cosmote users

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD. You use your Cosmote phone for...

Reference: companies and institutions which use Cosmote mobile telephony services



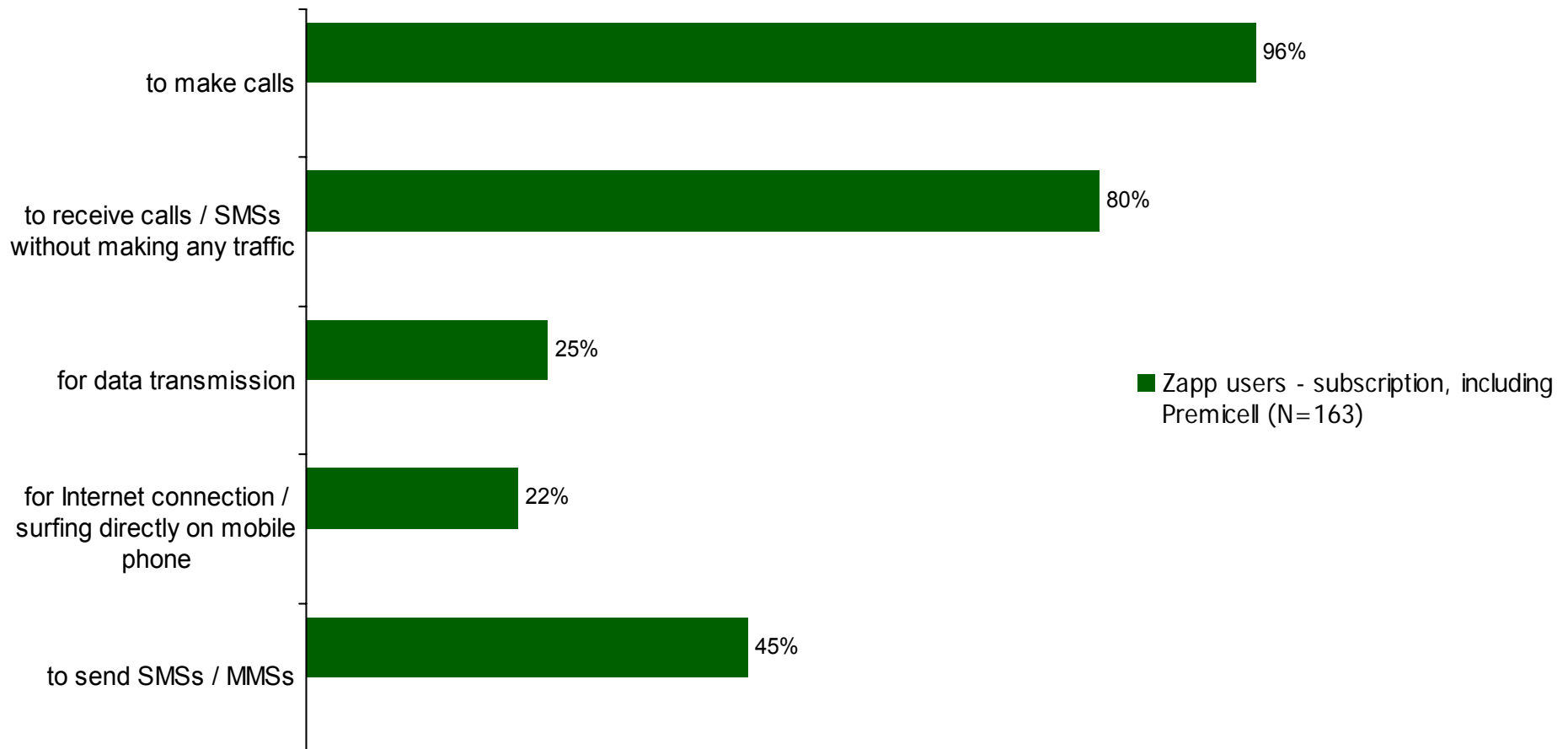
More than one answer

Mobile Telephony Consumption

Zapp users

Please indicate the purpose of mobile phone use in your company for each supplier that provides you with SUBSCRIPTION /PRE-PAID CARD. You use your Zapp phone for...

Reference: companies and institutions which use Zapp mobile telephony services



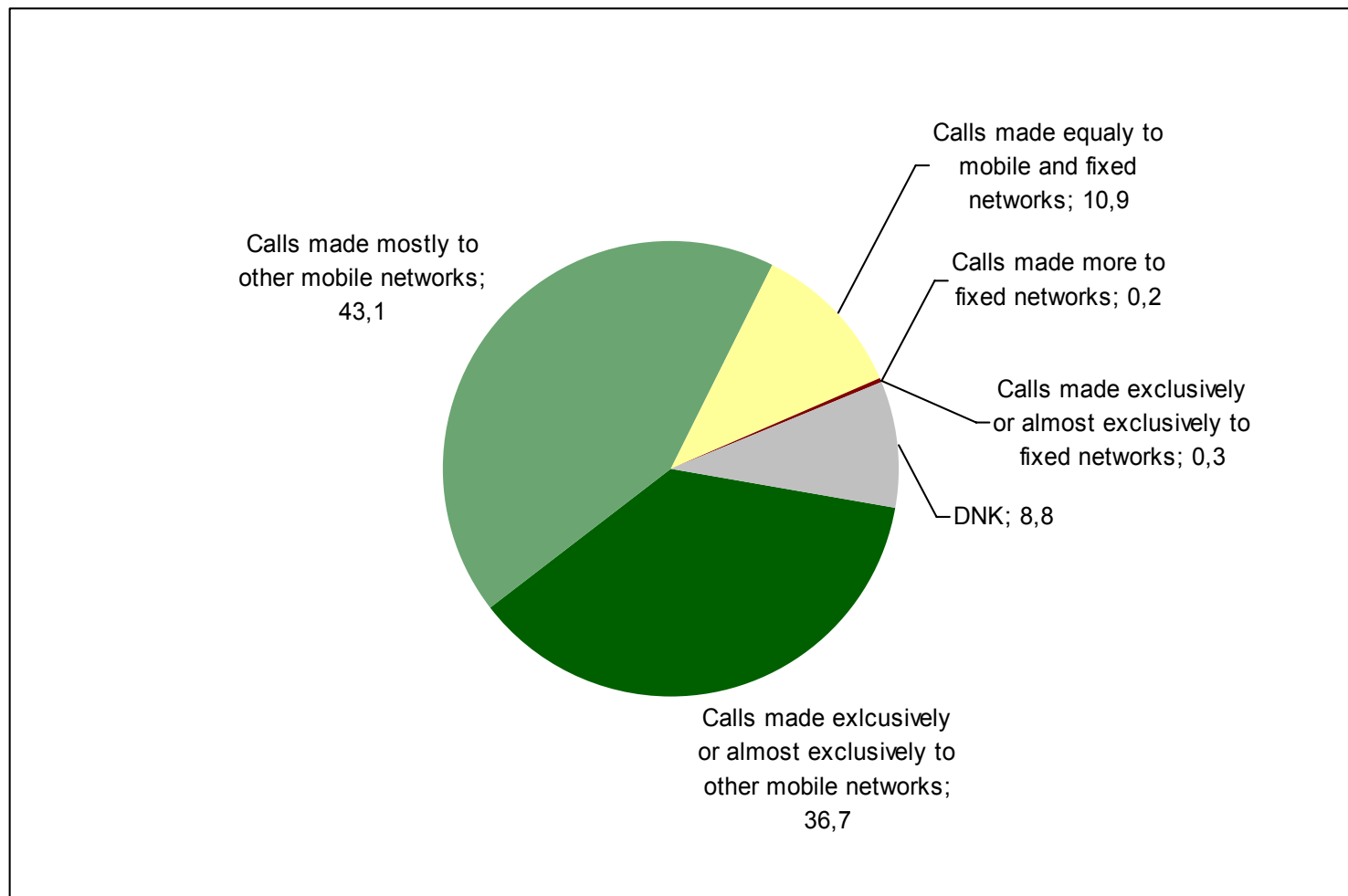
More than one answer

Mobile Telephony Consumption

mobile to fixed calls vs. mobile to mobile calls

Please think about domestic calls made by company employees using mobile phones in a month. Which of the following statements best describes how mobile phones are used?

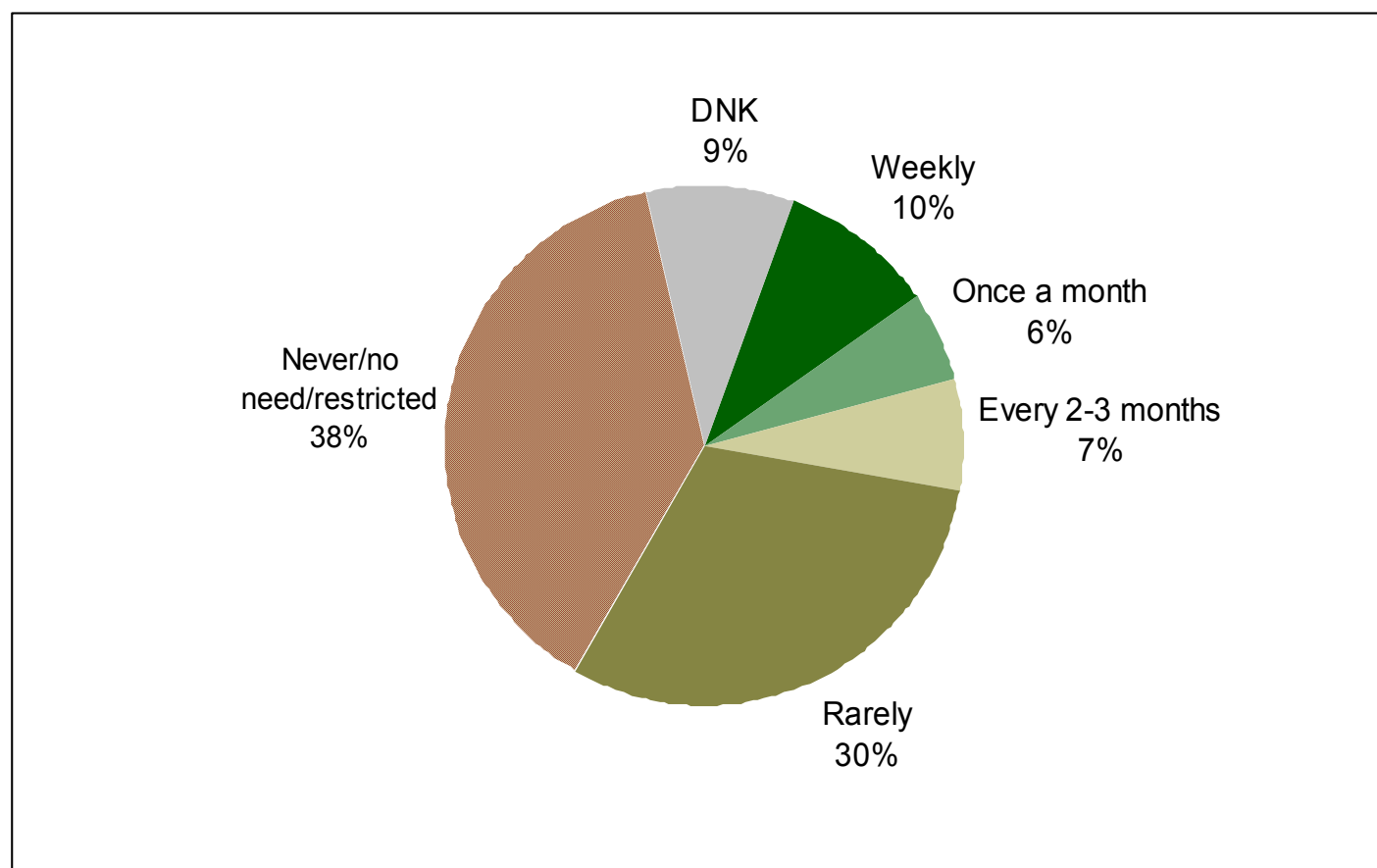
Reference: companies and institutions which use mobile telephony services,
N = 1124



Mobile Telephony Consumption in Roaming

How frequently do your company employees use mobile phones in roaming at company expense?

Reference: companies and institutions which use mobile telephony services, N = 1124



VII. Mobile Telephony Tariff Awareness

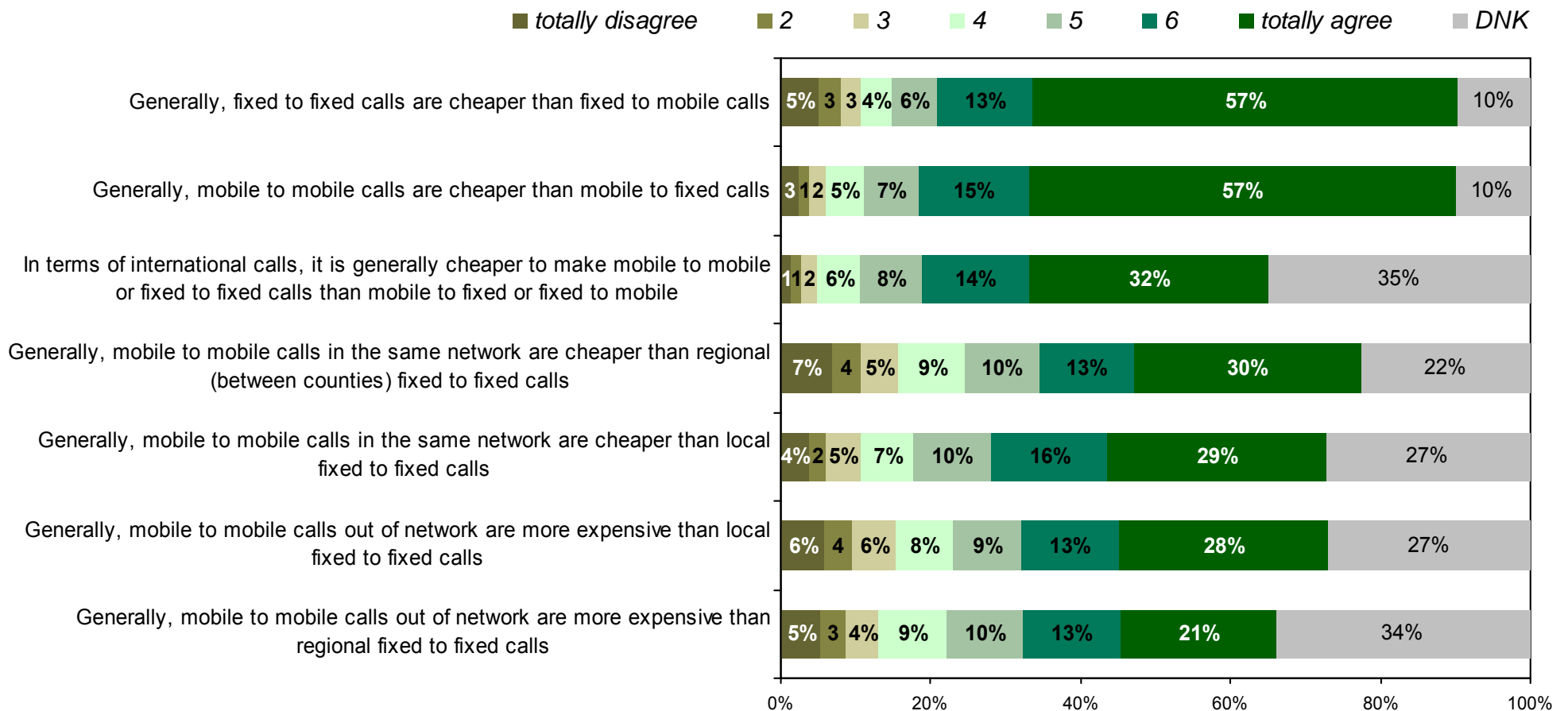
Mobile Telephony Tariff Awareness

- About 60% of companies and institutions are aware of the difference between tariff for fixed to fixed vs fixed to mobile calls by indicating the former as cheaper. Same situation is recorded for mobile to mobile vs. mobile to fixed call tariffs. These categories of tariffs are best known by companies and institutions, even if more than 30% of those do not know the exact differences among them.
- A high percentage (about 30%) of respondents indicated that they were not aware of other tariffs and they did not even try to give a correct or incorrect opinion.

Perception of Mobile and Fixed Network Call Tariffs

I will read you some statements that other people have made about fixed and mobile telephony. On a scale from 1 to 7, where 1 = totally disagree and 7 = totally agree, please indicate whether you agree with each of these statements.

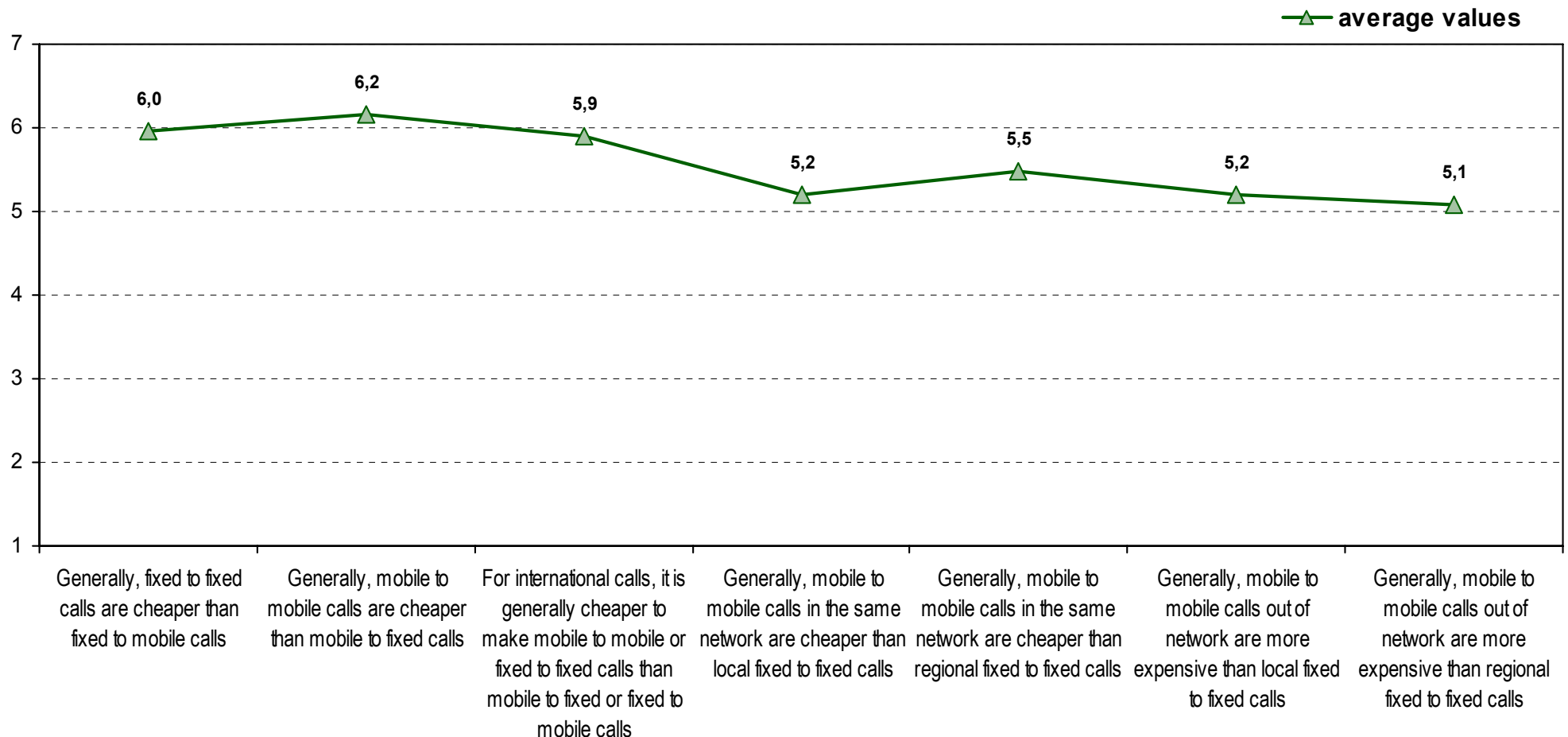
Reference: companies and institutions which use mobile telephony services,
N = 1124



Perception of Mobile and Fixed Network Call Tariffs

I will read you some statements that other people have made about fixed and mobile telephony. On a scale from 1 to 7, where 1 = totally disagree and 7 = totally agree, please indicate whether you agree with each of these statements.

Reference: companies and institutions which use mobile telephony services,
N = 1124



VIII. Selection Criteria for Mobile Telephony Services

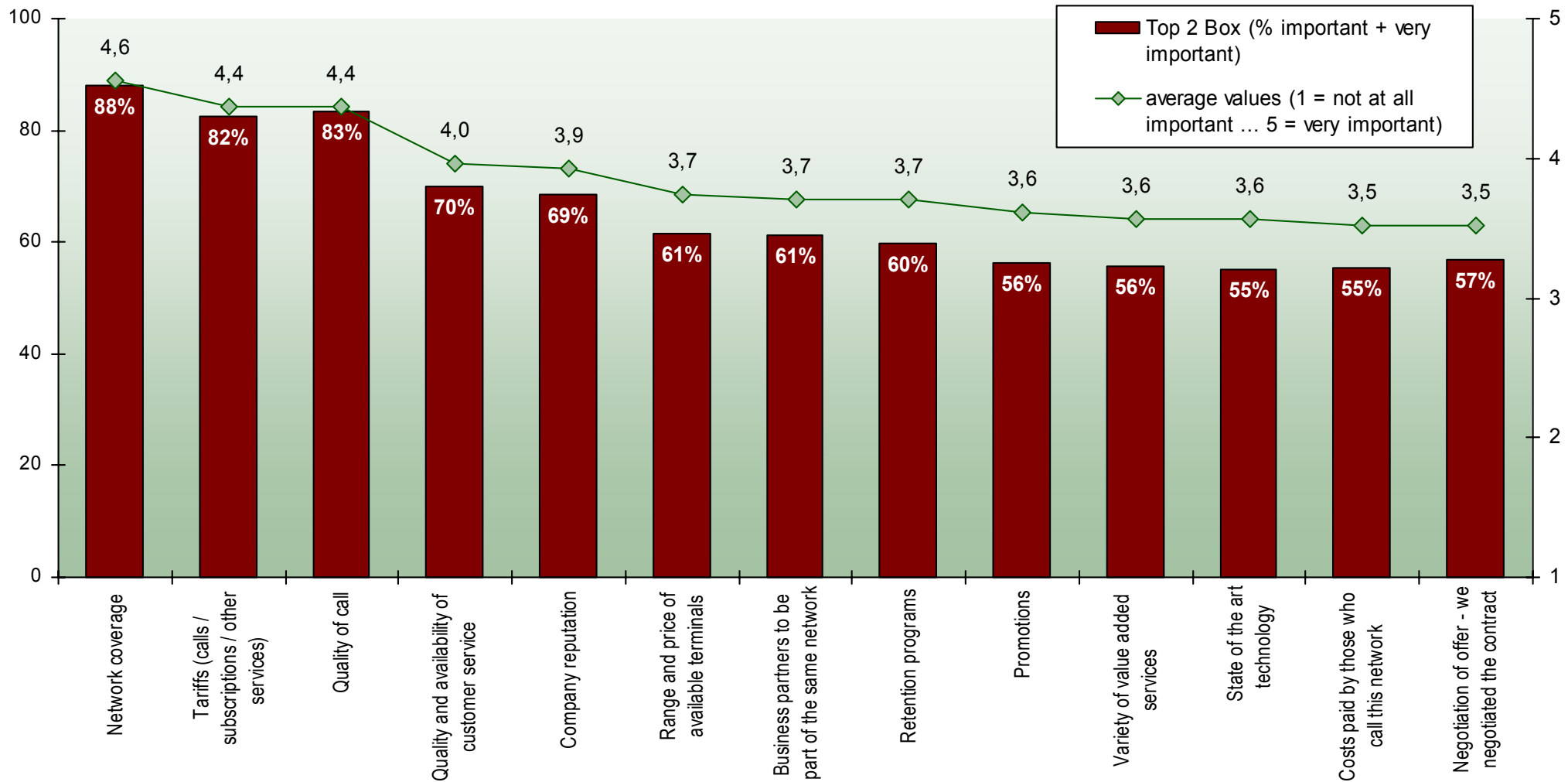
Selection Criteria for Mobile Telephony Services

- Most important criteria of selection of mobile telephony supplier are related to quality of call, coverage in the area and tariffs. The second category of selection criteria is related to quality of customer service and company reputation.
- Companies and institutions that use only subscription services are more sensitive to suppliers' tariffs and their availability to negotiate them. Companies which use only pre-paid cards are more sensitive to quality of calls and area coverage, promotions, their destination calls to be within the network and price of terminals.
- The analysis of segments of companies/institutions per number of employees indicates a clear tendency to higher demand on behalf of bigger companies (over 50 employees), which mention a higher rank to all selection criteria than other type of companies and institutions. There is an interesting gap between the evaluation of supplier's availability to negotiate tariffs between big and small companies; big companies, which have higher power of negotiation, evaluate this criterion as more important (4,3 on a scale from 1 to 5 where 5 is very important) as opposed to smaller companies (1-2 employees), which evaluate this criterion as lower in importance (3,1 on a scale from 1 to 5). Moreover, big companies, more interested in cost cutting, are more concerned about retention programs and promotions than smaller companies.
- As for tariffs, there are three categories of importance that companies and institutions have regarding mobile telephony services. The first category is the cost of subscription and in the network call tariffs, which are important and very important for 90% of companies. The second category is represented by mobile to mobile out of the network calls and mobile to fixed calls which are considered important and very important by 82% and 65% of companies and institutions respectively. The third category is made of international call, SMSs and roaming tariffs, which are important and very important for about 40-45% of companies and institutions.

Importance of Selection Criteria for Current Mobile Telephony Used

When you (last) selected your current mobile telephony supplier or service, how important were for you each of the following criteria?

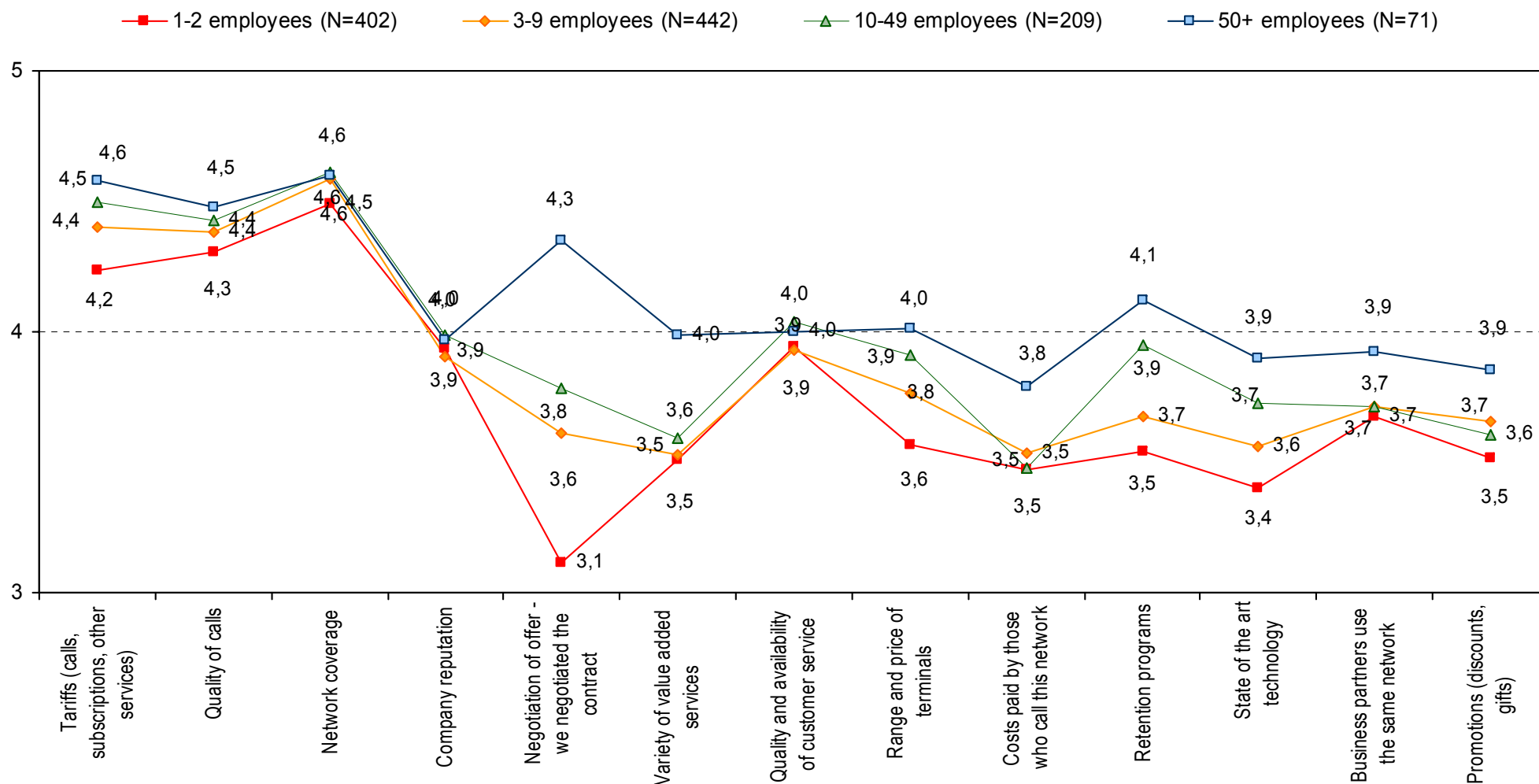
Reference: companies and institutions which use mobile telephony services, N = 1124



Rank of Criteria for Selection of Mobile Telephony Service per size of company and institution

When you (last) selected your current mobile telephony supplier or service, how important were for you each of the following criteria?

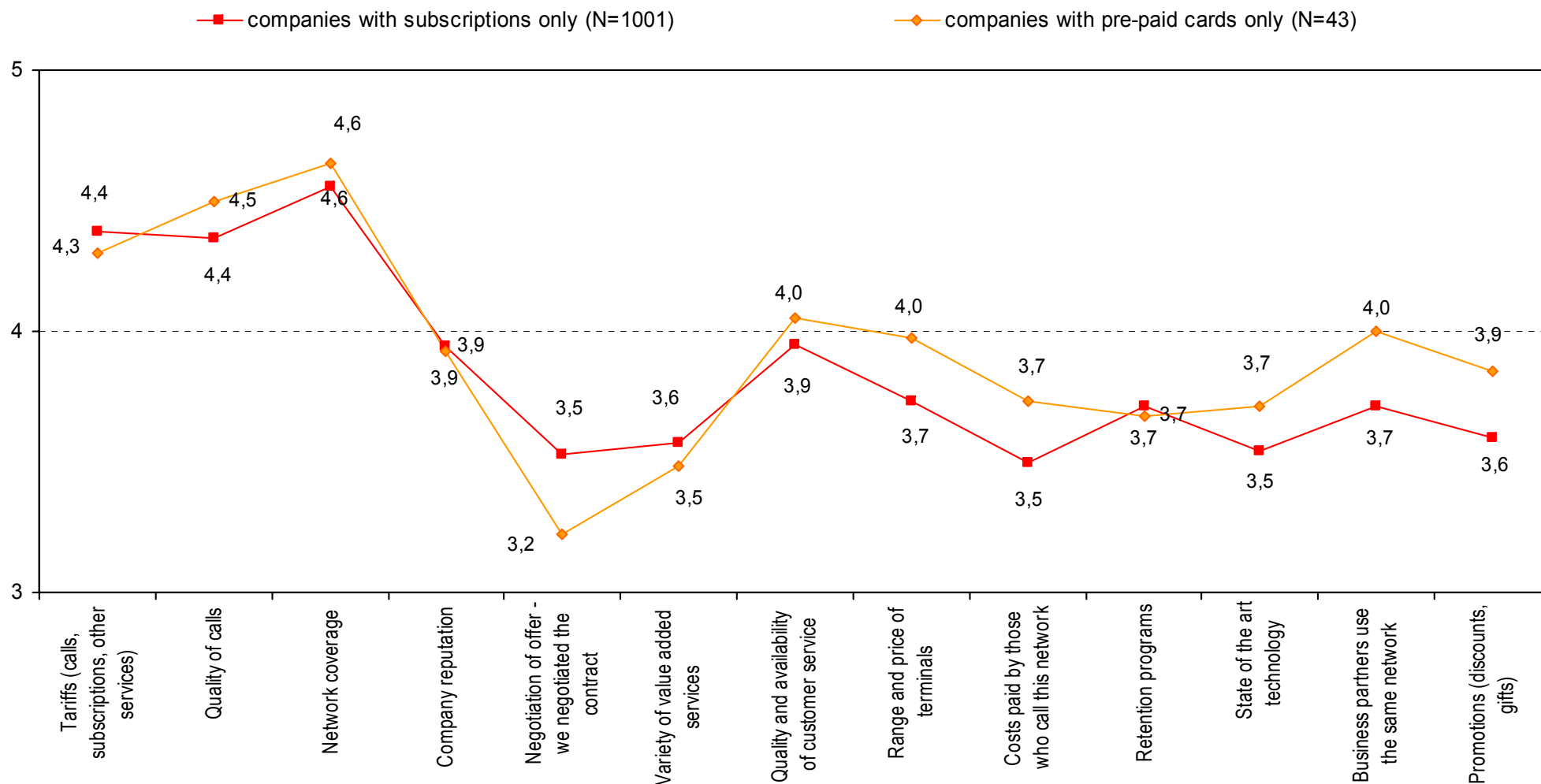
Average values
(1 = not at all important ... 5 = very important)



Rank of Criteria for Selection of Mobile Telephony Service per type of service used

When you (last) selected your current mobile telephony supplier or service, how important were for you each of the following criteria?

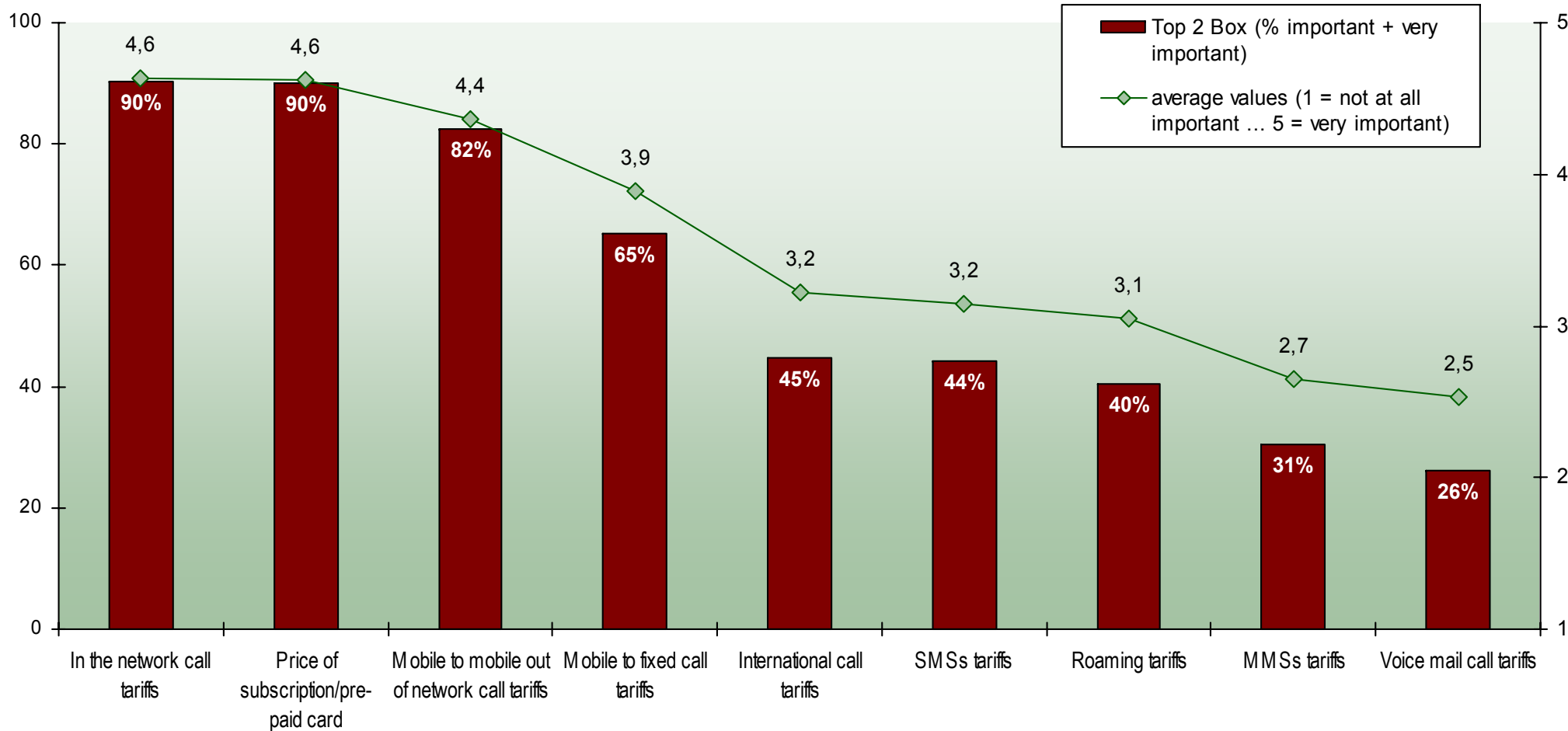
Average values
(1 = not at all important ... 5 = very important)



Importance of Type of Tariff for Selection of Currently Used Mobile Telephony Service

When you (last) selected your mobile telephony supplier or service, how important were for you each of the following categories of tariffs?

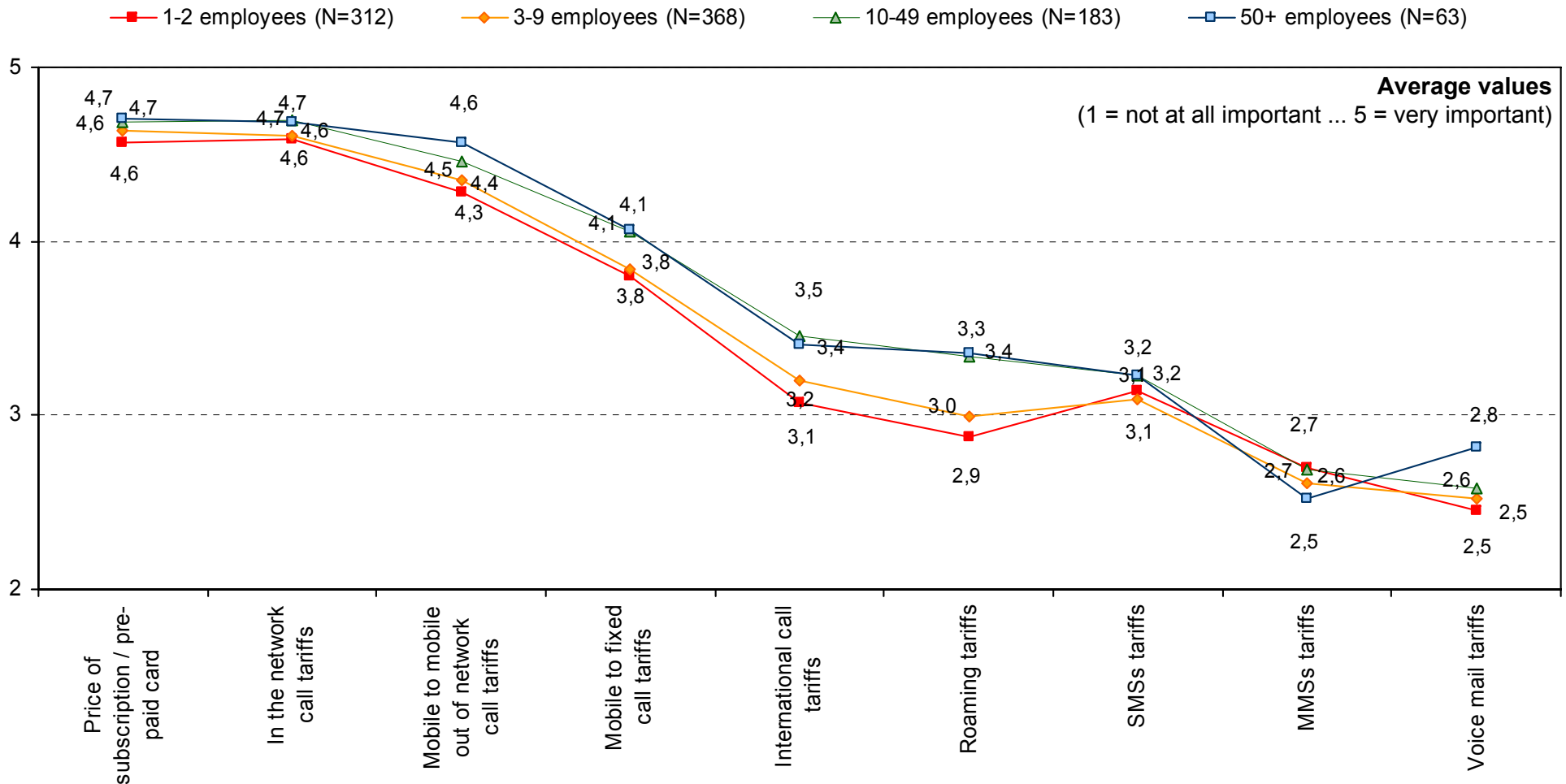
Reference: companies and institutions which ranked tariffs as important and very important for selecting mobile telephony services, N = 926



Importance of Type of Tariff for Selection of Mobile Telephony Service per size of company and institution

When you (last) selected your mobile telephony supplier or service, how important were for you each of the following categories of tariffs?

Reference: companies and institutions which ranked tariffs as important and very important for selecting mobile telephony services



IX. Level of Satisfaction with Mobile Telephony Supplier

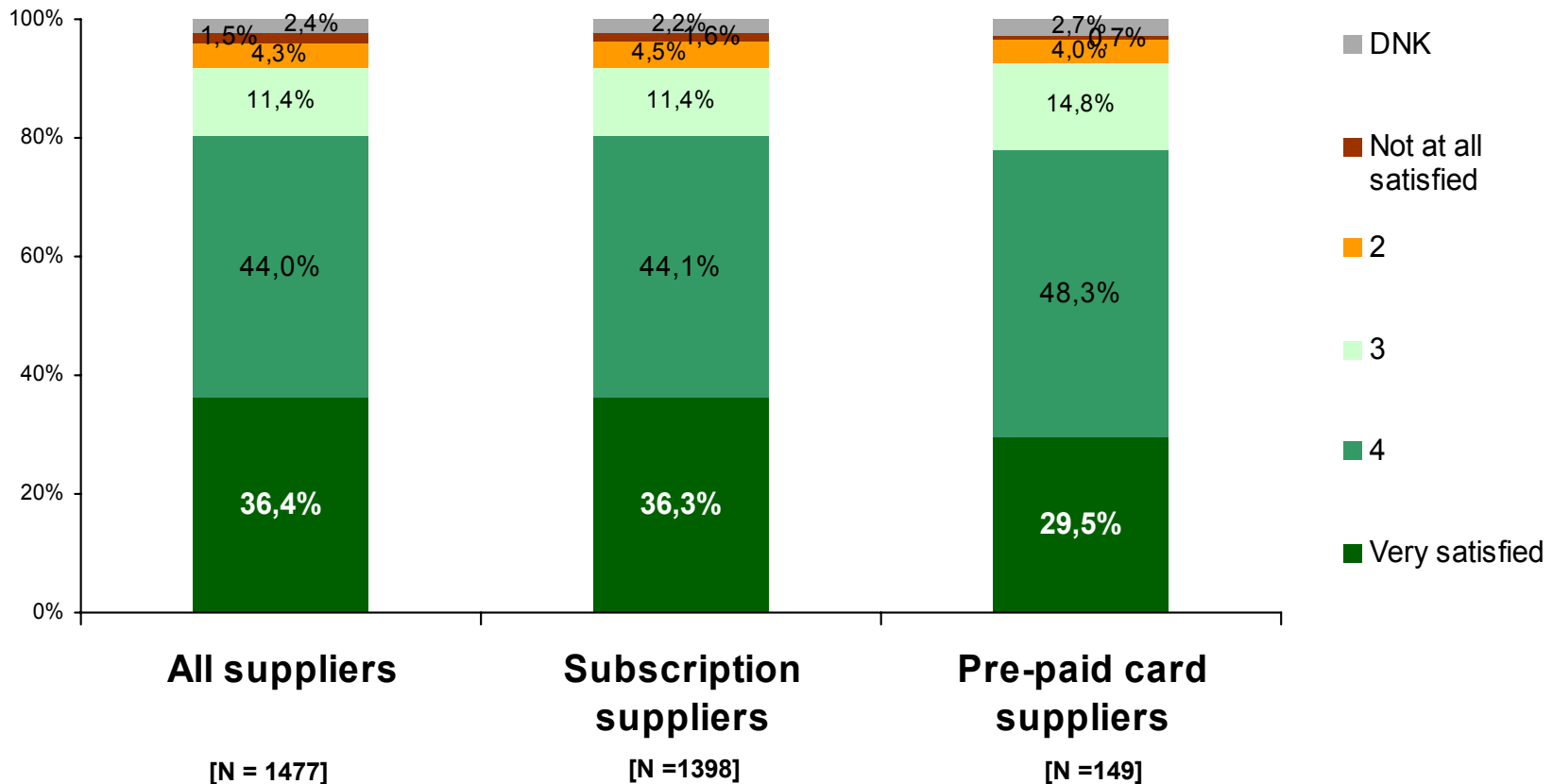
Level of Satisfaction with Mobile Telephony Supplier

- Orange and Vodafone register similar overall satisfaction ranking by their customers, with a slight more positive values for Vodafone (4,23 Vodafone as opposed to 4,16 Orange on a scale from 1 to 5, where 5 is very satisfied). Zapp registered an overall satisfaction score of 3,63 (lowest on the market), and Cosmote - 3,86.
- Specific evaluation of quality of service and tariff satisfaction, tariffs evaluation leads to lower scores (4 on a scale from 1 to 5). Satisfaction with Zapp and Cosmote tariffs is higher than for their services or overall evaluation (the most obvious case is Zapp, which seems to have attractive tariffs for its users).
- Subscription users of Vodafone and Orange are a bit more satisfied with their services and tariffs than pre-paid users of the same suppliers. Cosmote presents a reversed situation, where pre-paid card services are most appreciated by users, both in terms of service quality and tariffs.
- Generally, companies and institutions that indicate tariffs as having little or no importance in selecting suppliers, register a lower tariff satisfaction than companies and institutions which consider tariffs as an important or very important criterion. In other words, tariffs are slightly becoming the drivers for giving up the mobile telephony supplier.

Overall Satisfaction with Mobile Telephony Suppliers*

Overall how satisfied are you with this mobile telephony supplier?
Please use a scale from 1 to 5 where “5” is very satisfied and “1” is not at all satisfied.

Reference: total number of suppliers whose services are used by companies and institutions

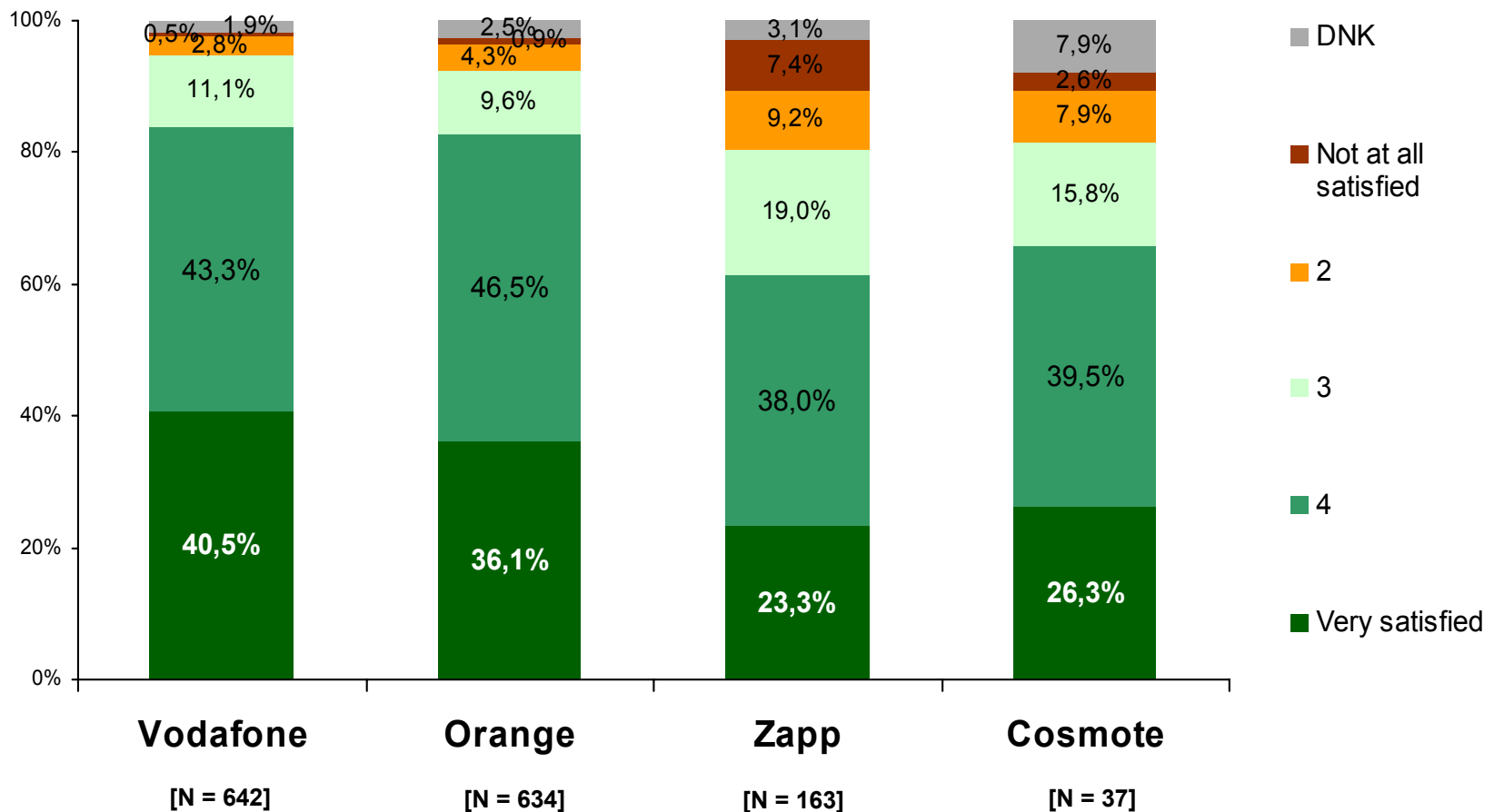


*companies which use mobile telephony services evaluated their satisfaction with each supplier. This chart presents satisfaction with all suppliers overall; a company with two suppliers has been taken into account twice with the scores that it gave for each supplier (similarly for companies with 3-4 suppliers).

Overall Satisfaction with Mobile Telephony Suppliers

Overall how satisfied are you with this mobile telephony supplier?
Please use a scale from 1 to 5 where “5” is very satisfied and “1” is not at all satisfied.

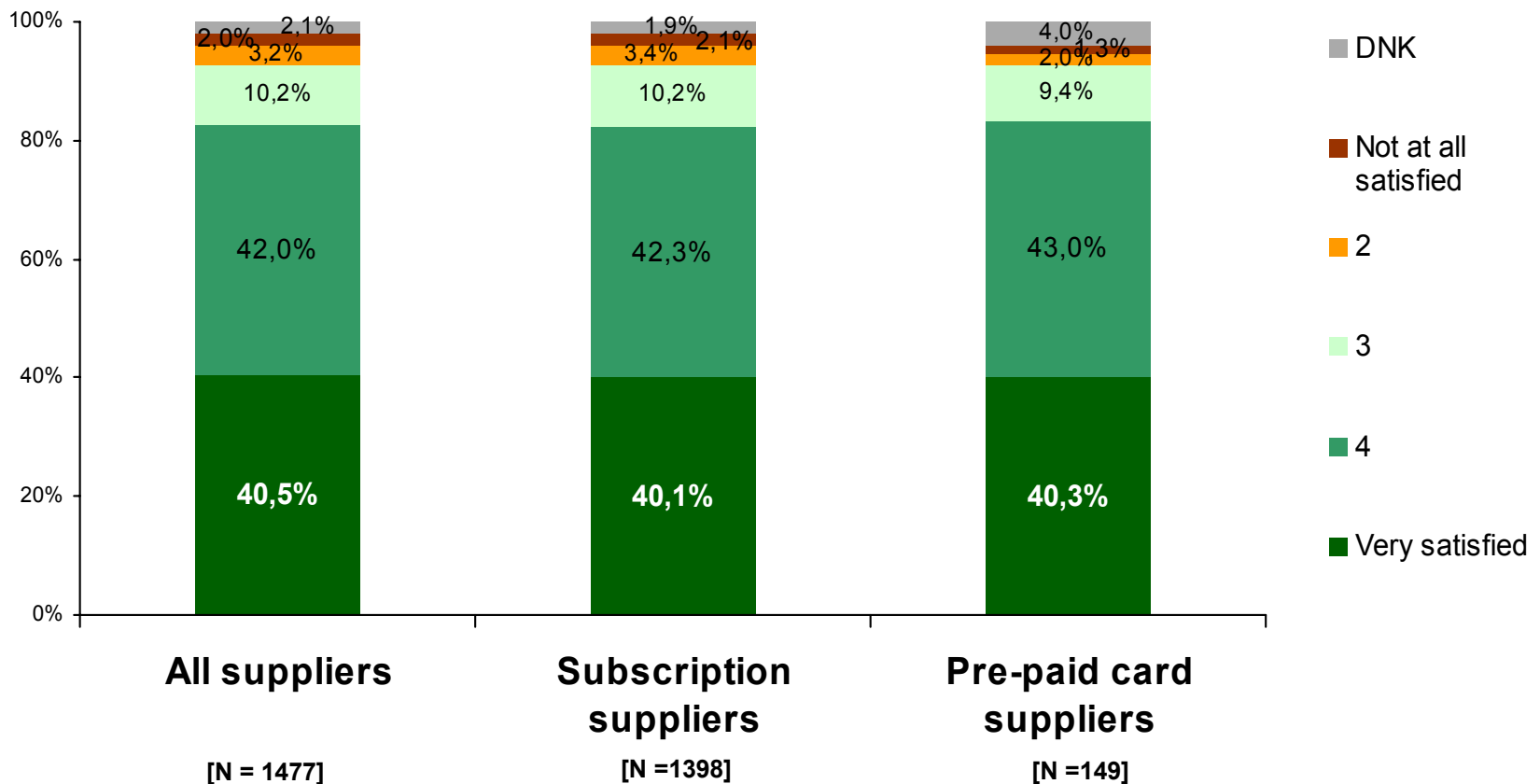
Reference: companies and institutions which use mobile telephony services from the respective suppliers



Satisfaction with Service Quality of Mobile Telephony Suppliers*

On the same scale, how satisfied are you with service quality of this supplier?

Reference: total number of suppliers whose services are used by companies and institutions

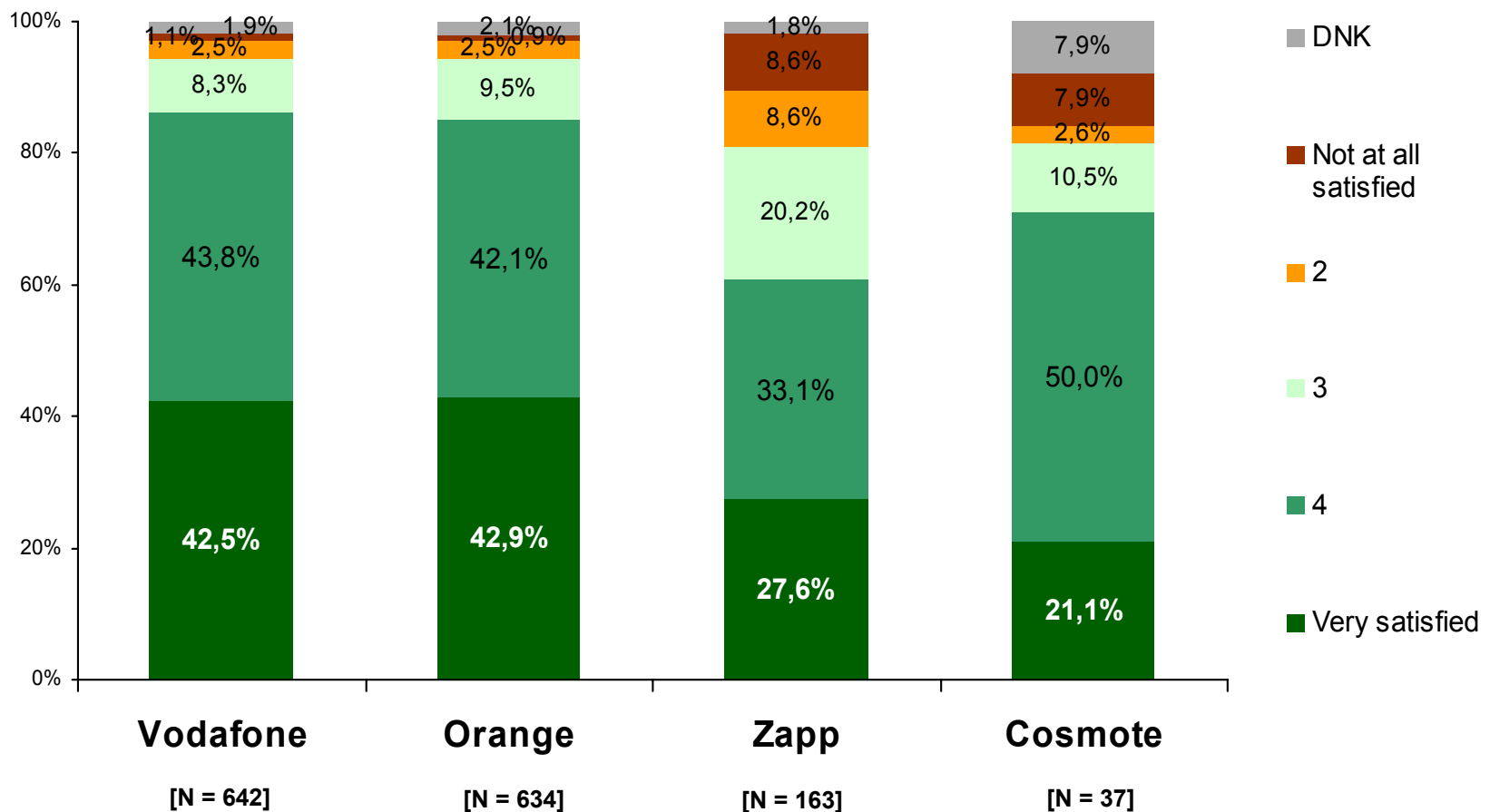


* companies which use mobile telephony services evaluated their satisfaction with each supplier. This chart presents satisfaction with all suppliers overall; a company with two suppliers has been taken into account twice with the scores that it gave for each supplier (similarly for companies with 3-4 suppliers).

Satisfaction with Service Quality of Mobile Telephony Suppliers

On the same scale, how satisfied are you with service quality of this supplier?

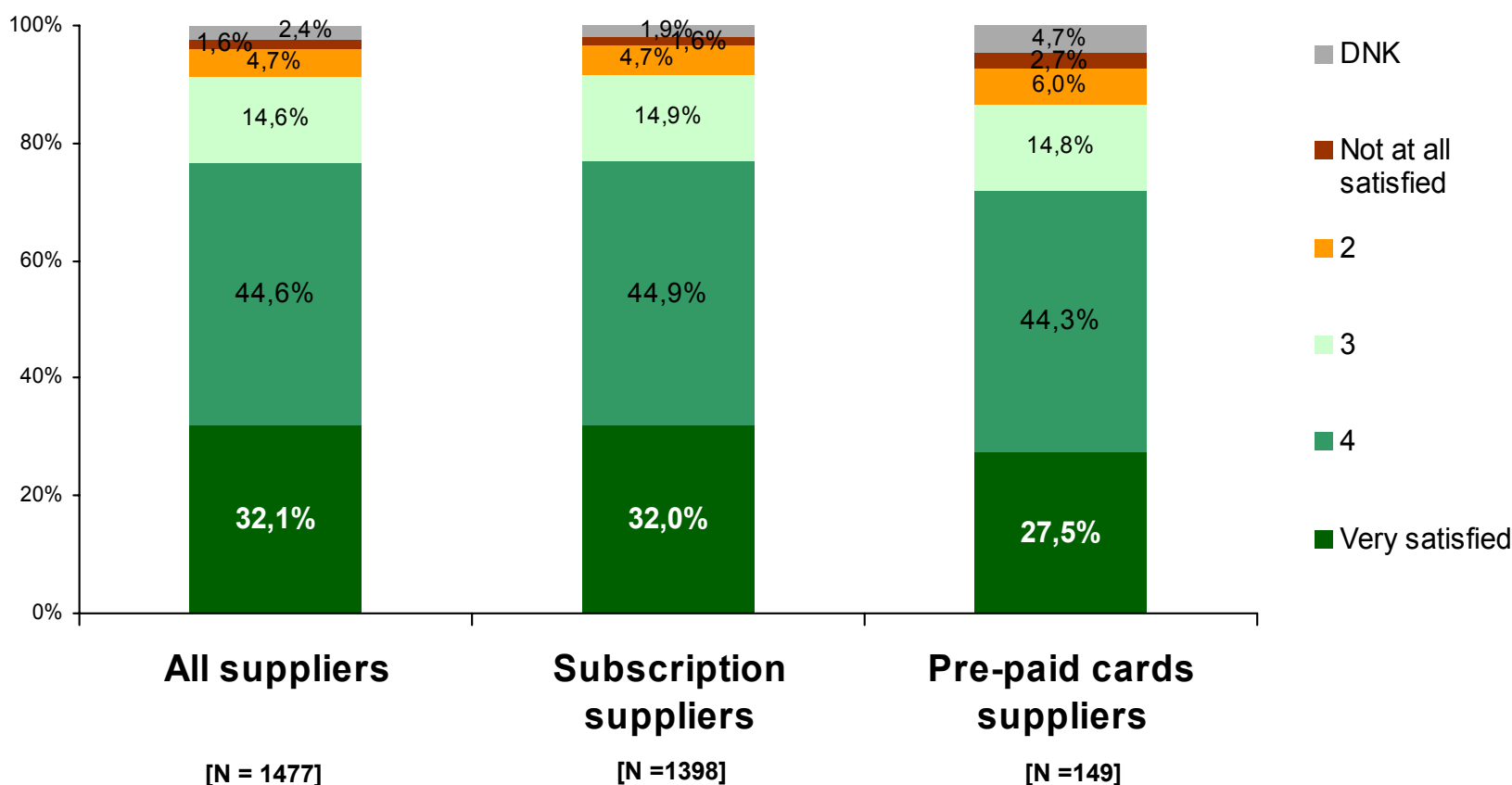
Reference: companies and institutions which use mobile telephony services from the respective suppliers



Satisfaction with Tariffs of Mobile Telephony Suppliers*

On the same scale, how satisfied are you with the tariffs of this supplier?

Reference: total number of suppliers whose services are used by companies and institutions

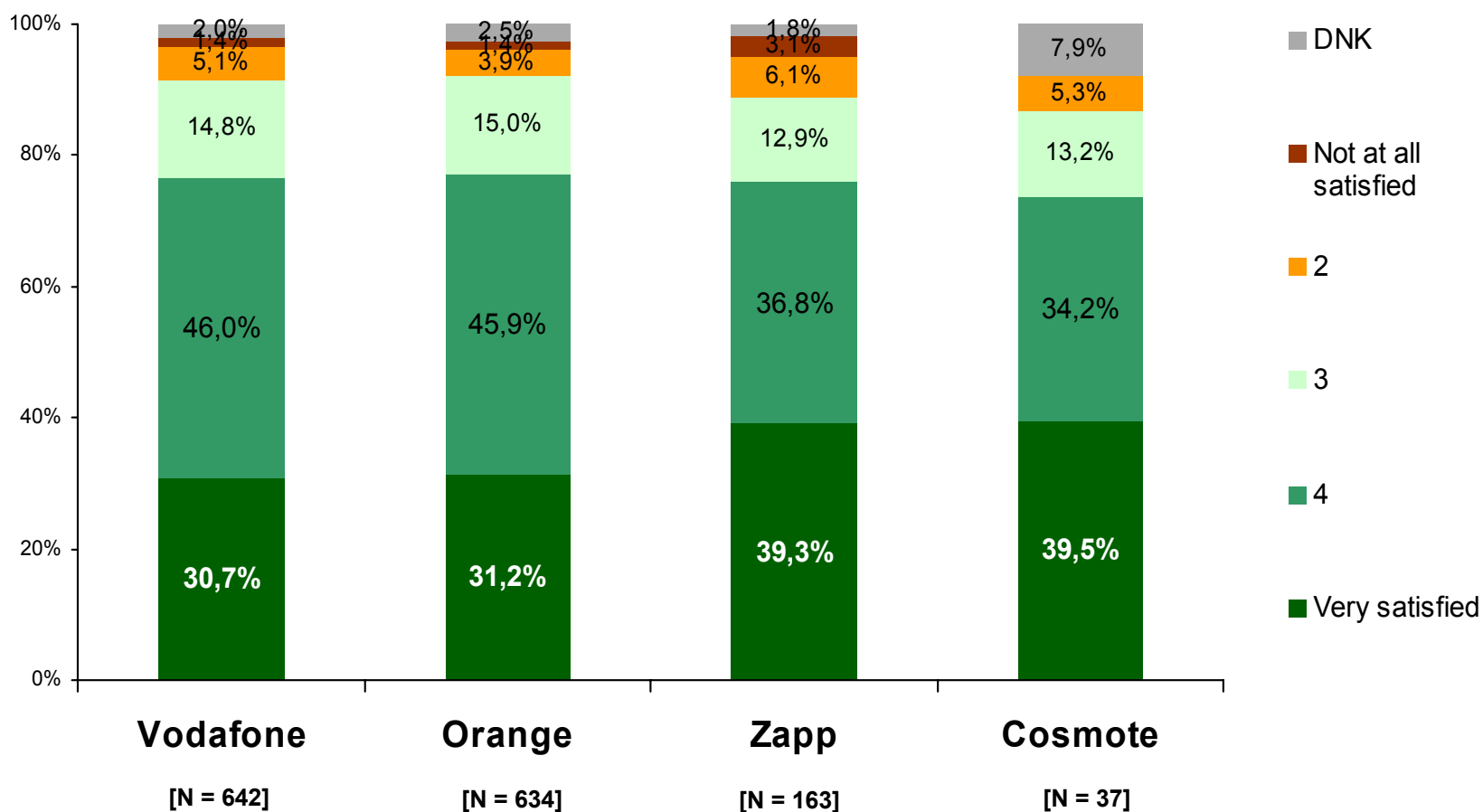


* companies which use mobile telephony services evaluated their satisfaction with each supplier. This chart presents satisfaction with all suppliers overall; a company with two suppliers has been taken into account twice with the scores that it gave for each supplier (similarly for companies with 3-4 suppliers).

Satisfaction with Tariffs of Mobile Telephony Suppliers

On the same scale, how satisfied are you with the tariffs of this supplier?

Reference: companies and institutions which use mobile telephony services from the respective suppliers



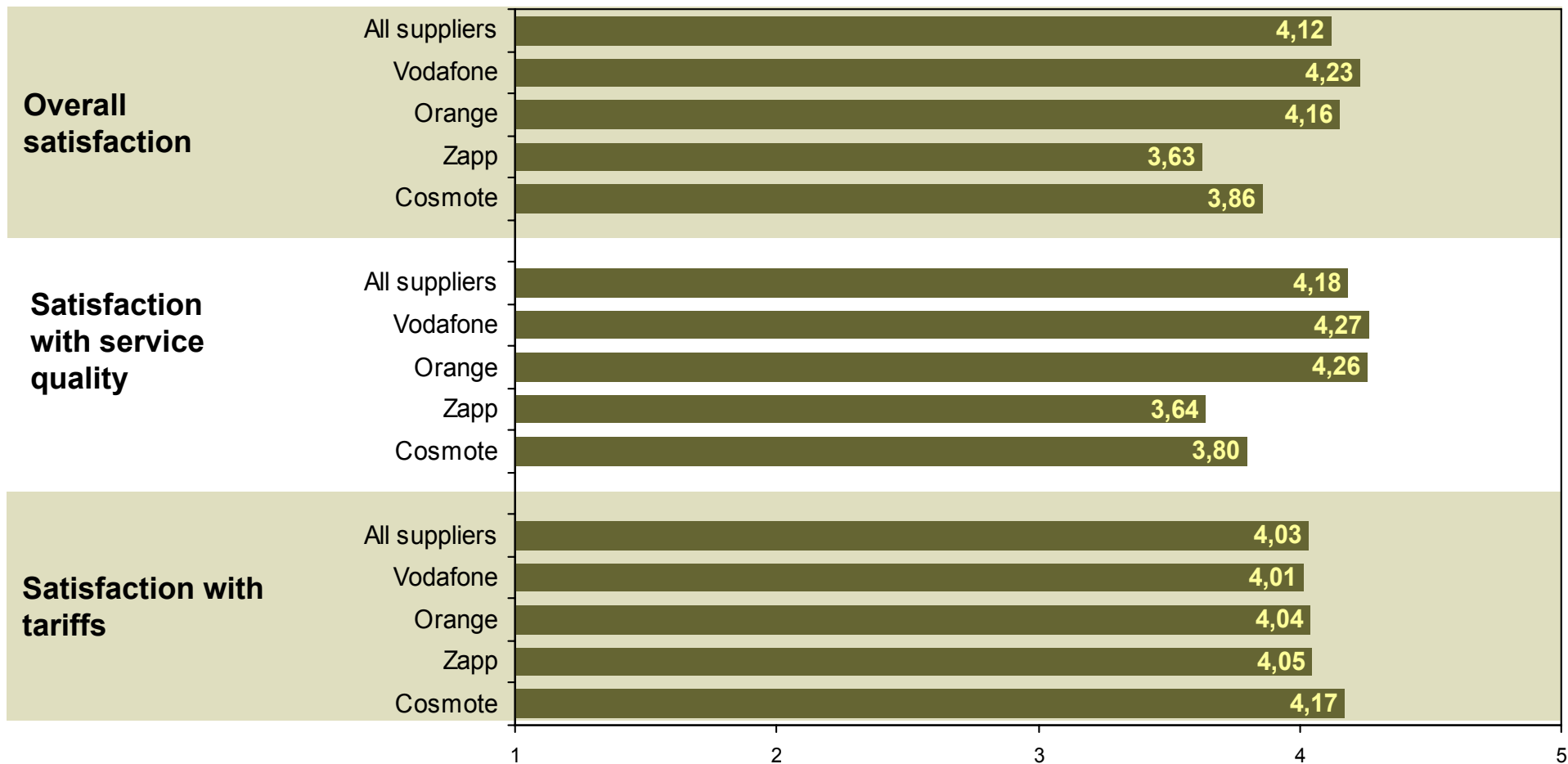
Satisfaction with Mobile Telephony Suppliers

average values

Overall, how satisfied are you with this mobile telephony supplier?
How satisfied are you with service quality of this supplier?
How satisfied are you with tariffs of this supplier?

Reference: companies and institutions which use mobile telephony services from the respective suppliers

■ average values (1=not at all satisfied...5=very satisfied)

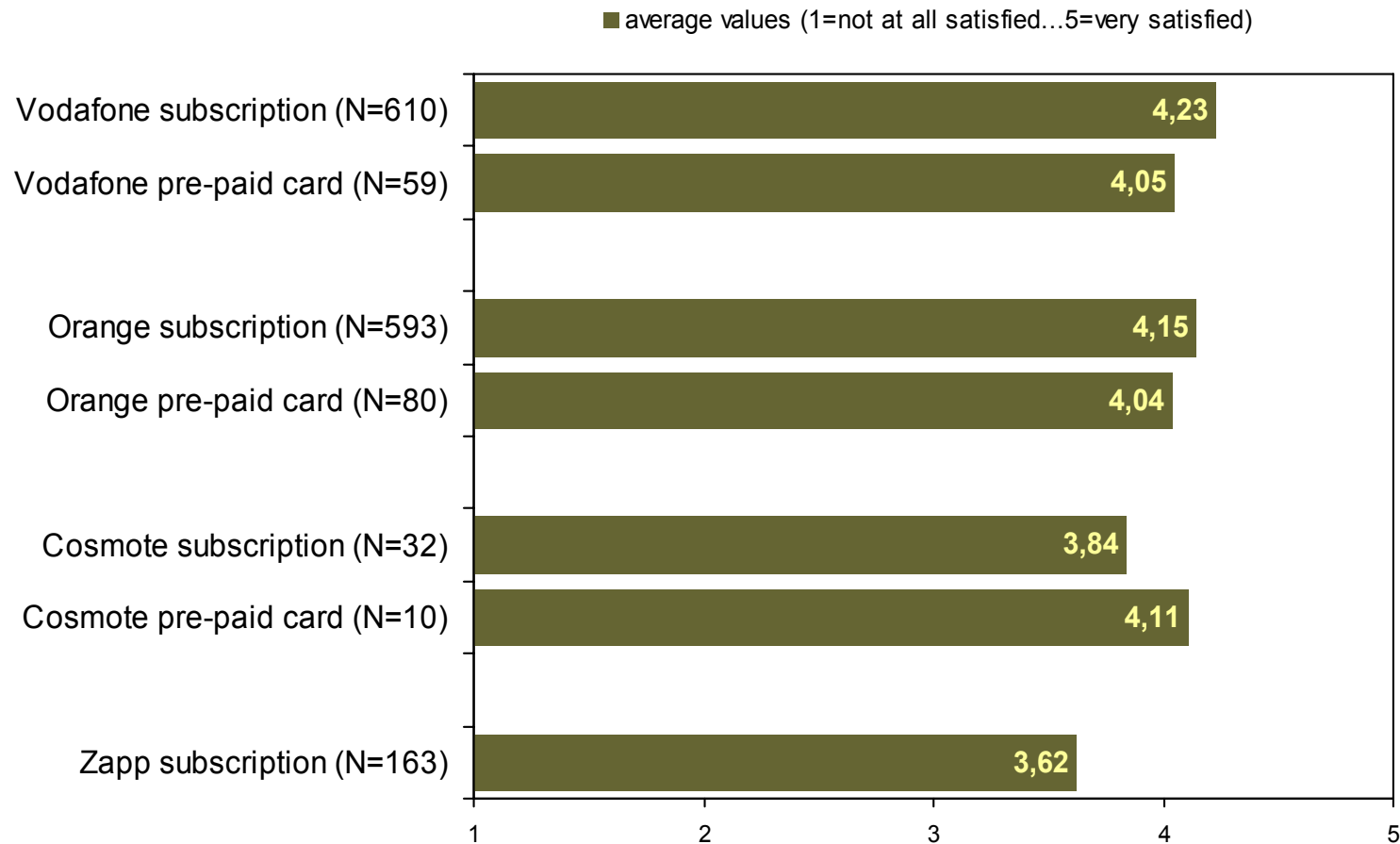


Overall Satisfaction with Mobile Telephony Suppliers

average values

Overall, how satisfied are you with this mobile telephony supplier?

Reference: companies and institutions which use subscription/pre-paid card mobile telephony services from the respective suppliers

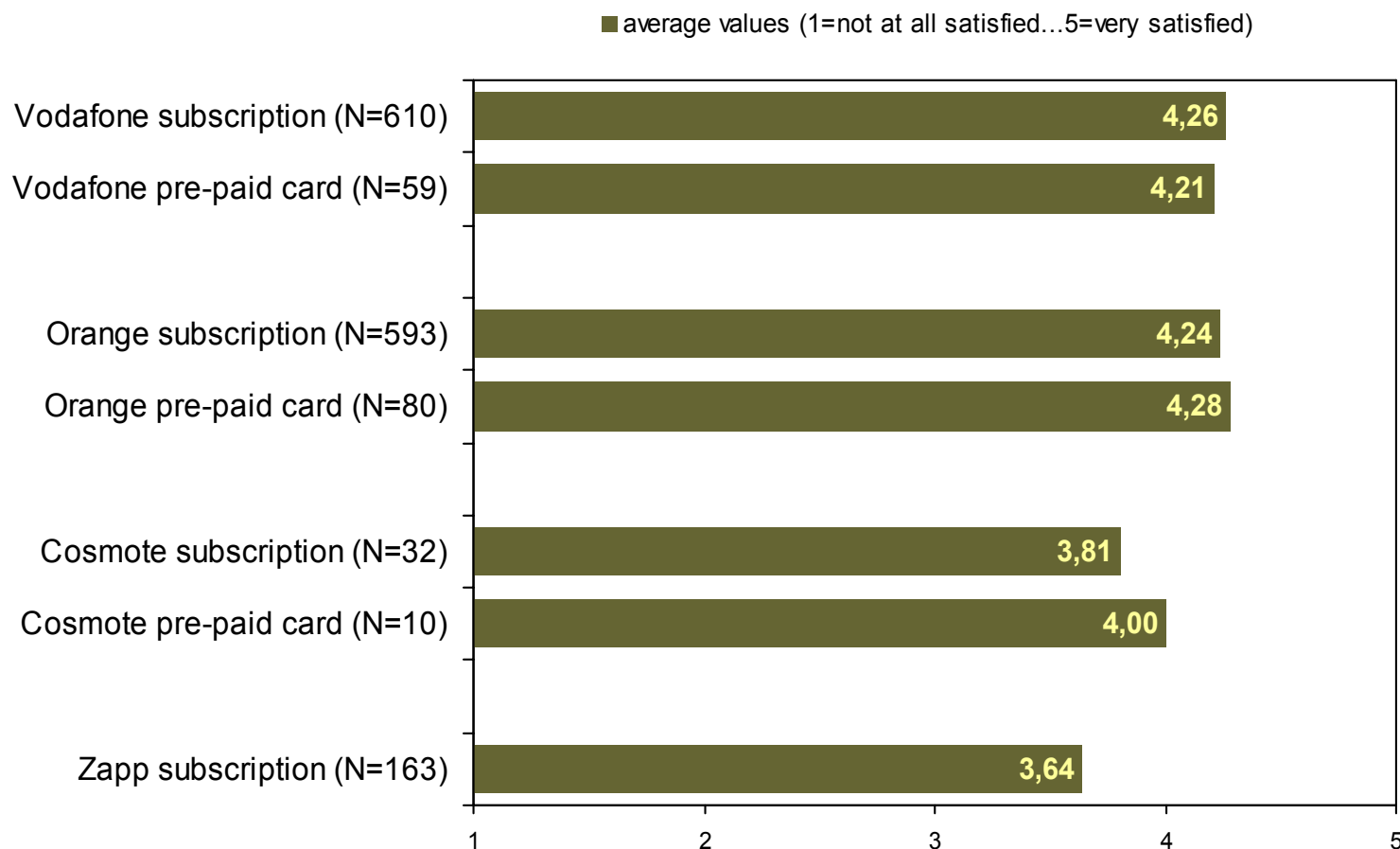


Satisfaction with Service Quality of Mobile Telephony Suppliers

(average values)

On the same scale, how satisfied are you with service quality of this supplier?

Reference: companies and institutions which use subscription/pre-paid card mobile telephony services from the respective suppliers

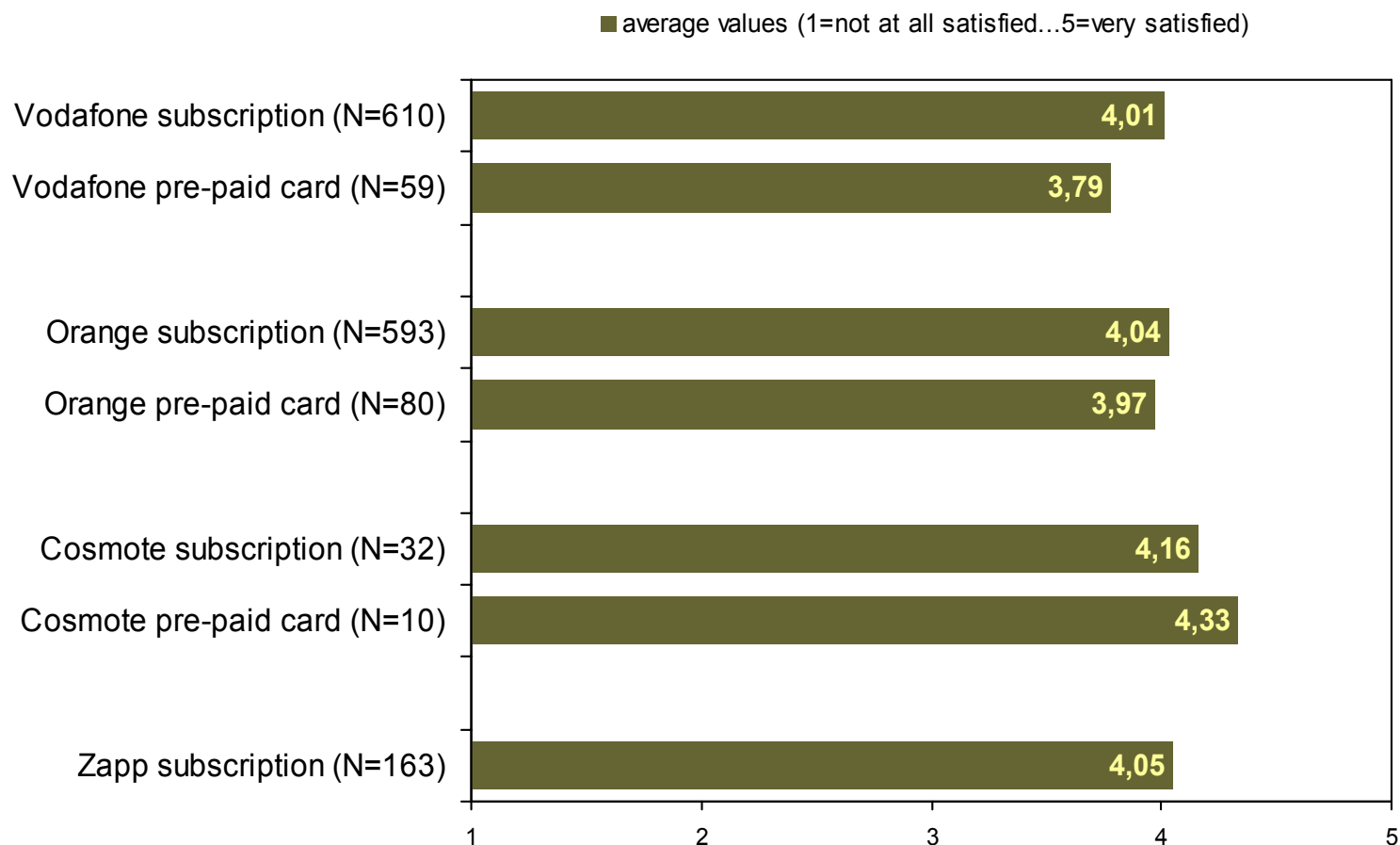


Satisfaction with Tariffs of Mobile Telephony Suppliers

(average values)

On the same scale, how satisfied are you with the tariffs of this supplier?

Reference: companies and institutions which use subscription/pre-paid card mobile telephony services from the respective suppliers



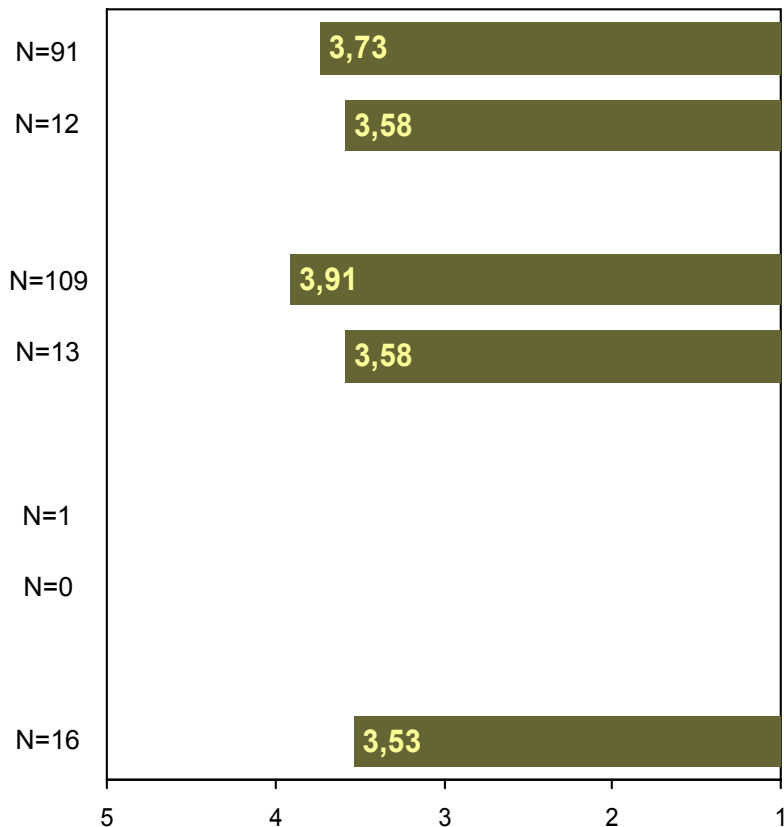
Satisfaction with Tariffs of Mobile Telephony Suppliers

per importance of “tariff” criteria when selecting mobile telephony service

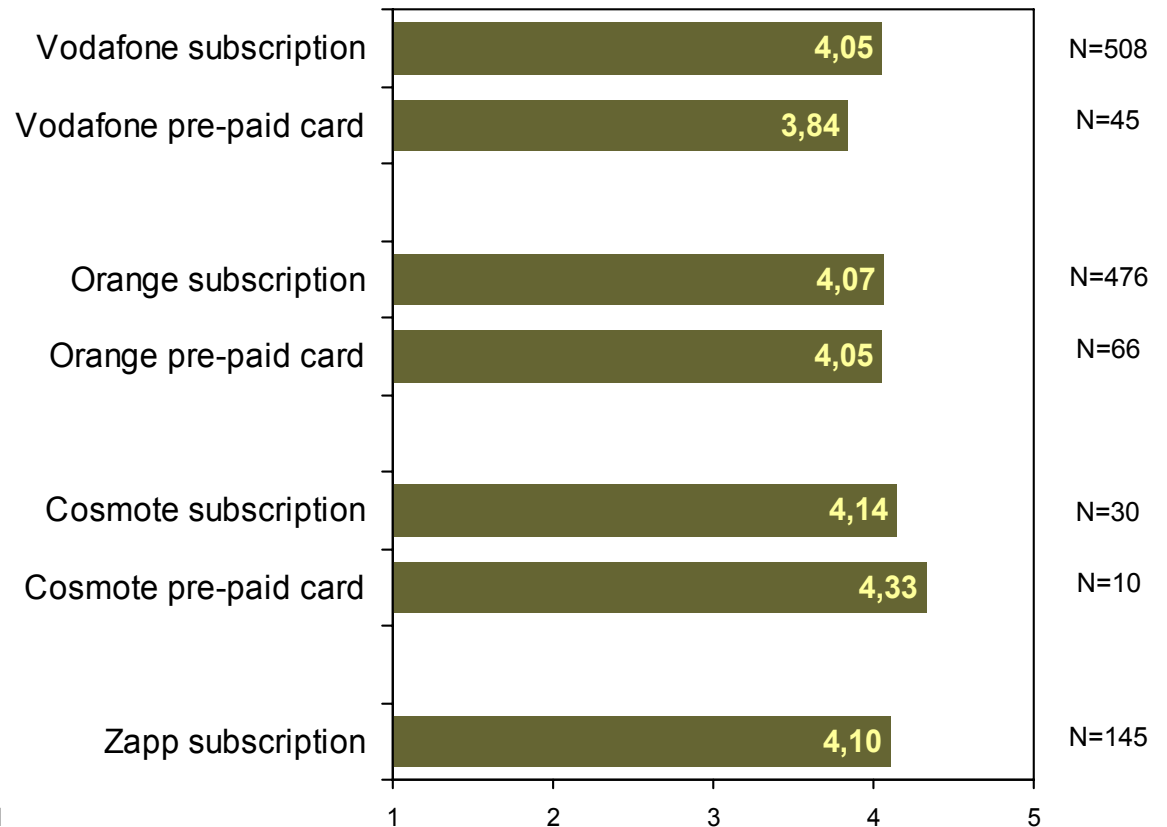
On the same scale, how satisfied are you with the tariffs of this supplier?

Average values
(1 = not at all important ... 5 = very important)

Companies and institutions for which tariffs are not at all, a little or somewhat important when selecting a mobile telephony service



Companies and institutions for which tariffs are important and very important when selecting a mobile telephony service



X. Level and Reasons for Substitution of Mobile Telephony Services and Suppliers

Level and Reasons for Substitution of Mobile Telephony Services and Suppliers

- Main obstacle against changing mobile telephony supplier is the desire “to keep the same phone number”. The next obstacle is cost efficiency i.e. “most people we call use the same network” and “convenience”. The lack of information about existing alternatives on the market represent an obstacle for only 8% of companies/institutions which are dissatisfied with their current supplier.
- The obstacles of “keeping the same number” and “all suppliers have high tariffs” are more often met by companies and institutions which use pre-paid cards and have over 10 employees. The need to keep the same number is an obstacle against switching for companies which use subscription services.
- Up to 10% of companies and institutions state their intention to give up a supplier and even less are pre-paid users. The analysis of suppliers indicates a significantly higher intention (20%) to give up by Zapp users, and most companies that generate this segment are those with less than 10 employees, who have lower mobility needs for data transmission and Internet surfing on mobile phones.
- The South-West region registers higher intention to give up the services of Vodafone and Orange, and Zapp registers a higher intention in North-East, South, West and Bucharest.
- Almost all companies and institutions which intend to give up a mobile telephony supplier currently use subscription services. Their intention to give up is directly influenced by the number of suppliers they currently have. While only 8% of companies which currently have one supplier may or might give up its services, 34% of companies which have 3 or 4 supplier intend to give up at least one of them.

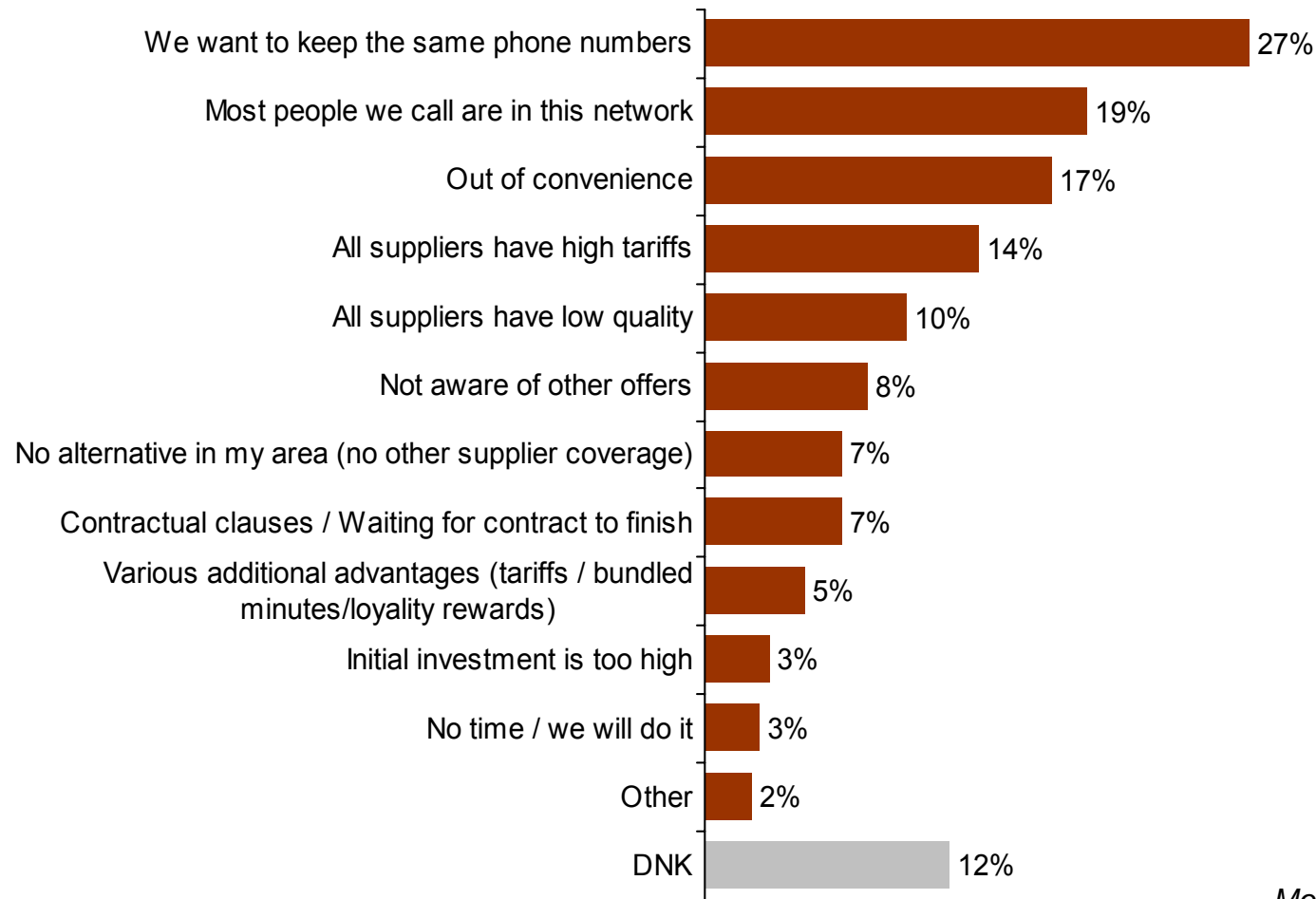
Level and Reasons for Substitution of Mobile Telephony Services and Suppliers

- Most of the companies which intend to give up their current mobile telephony supplier will choose another supplier, but not necessarily a new one; they may decide to give their business to an existing supplier. Only 2% of those intend to replace mobile telephony with Internet telephony and only 1% intend to use fixed telephony instead.
- The reasons for giving up the current mobile telephony supplier are mainly financial. 27% of companies/institutions which intend to give up state as reason the fact that new suppliers, with better tariffs and services, have come out. Additional reasons are too high in the network and out of network call tariffs (17%).
- Only 8% of companies/institutions have given up a supplier over the last 12 months, most of them with subscription services. However, they have given up the supplier because of quality of calls and technical support. In other words, technical reasons are more stimulating reasons to give up as opposed to financial reasons and technical faults would determine the behaviour generally.
- Among companies and institutions which have given up a supplier over the last 12 months, 77% have replaced it with another subscription mobile telephony supplier and 18% have given up totally, without replacing it with another supplier or service.

Obstacles against Changing Suppliers

You indicated you were dissatisfied with the services of a mobile telephony supplier (s). Why have you not given up their services so far?

Respondents: interviewees who are dissatisfied with their current mobile telephony supplier, N = 221



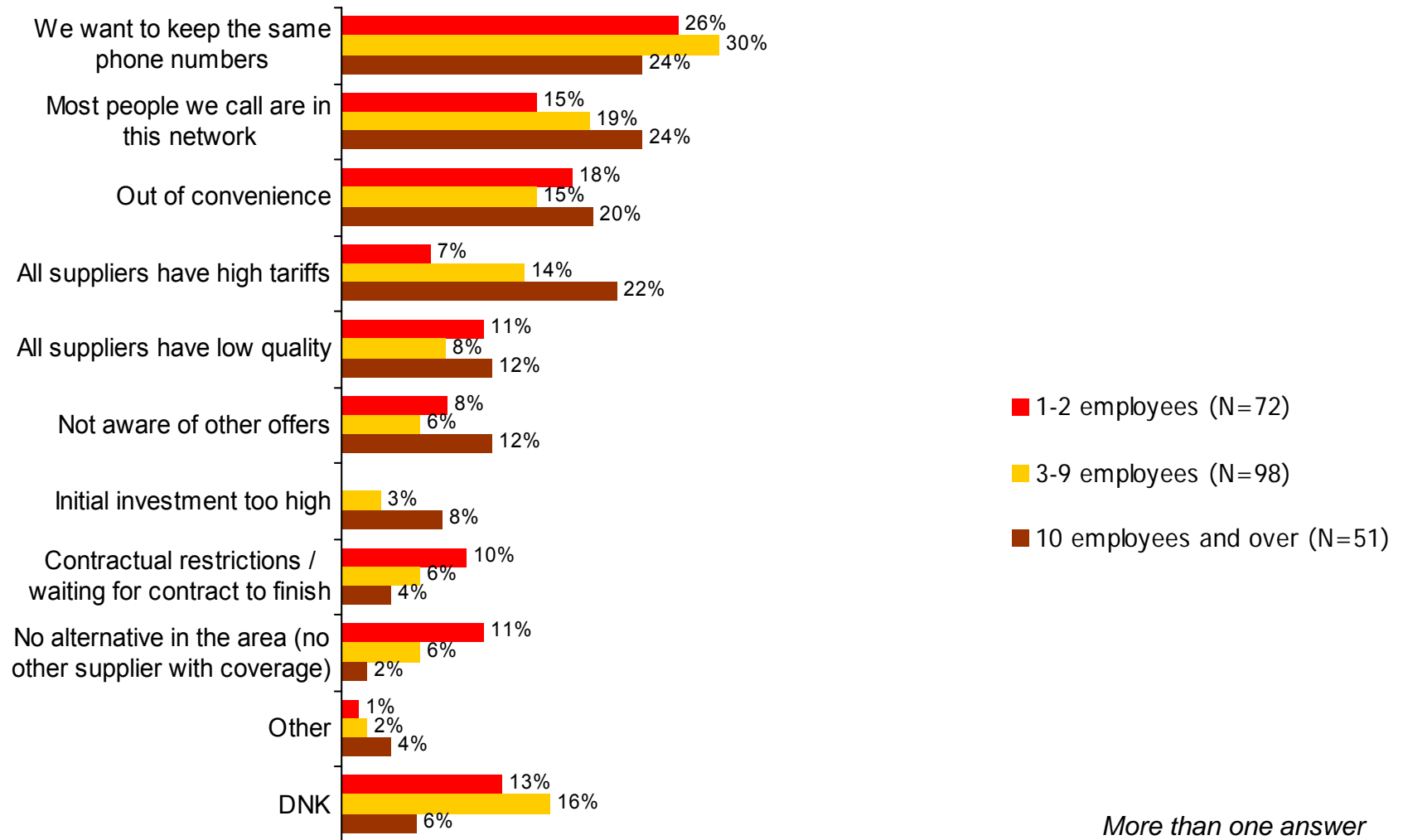
More than one answer

Obstacles against Changing Suppliers

per size of company and institution

You indicated you were dissatisfied with the services of a mobile telephony supplier (s). Why have you not given up their services so far?

Respondents: interviewees who are dissatisfied with their current mobile telephony supplier



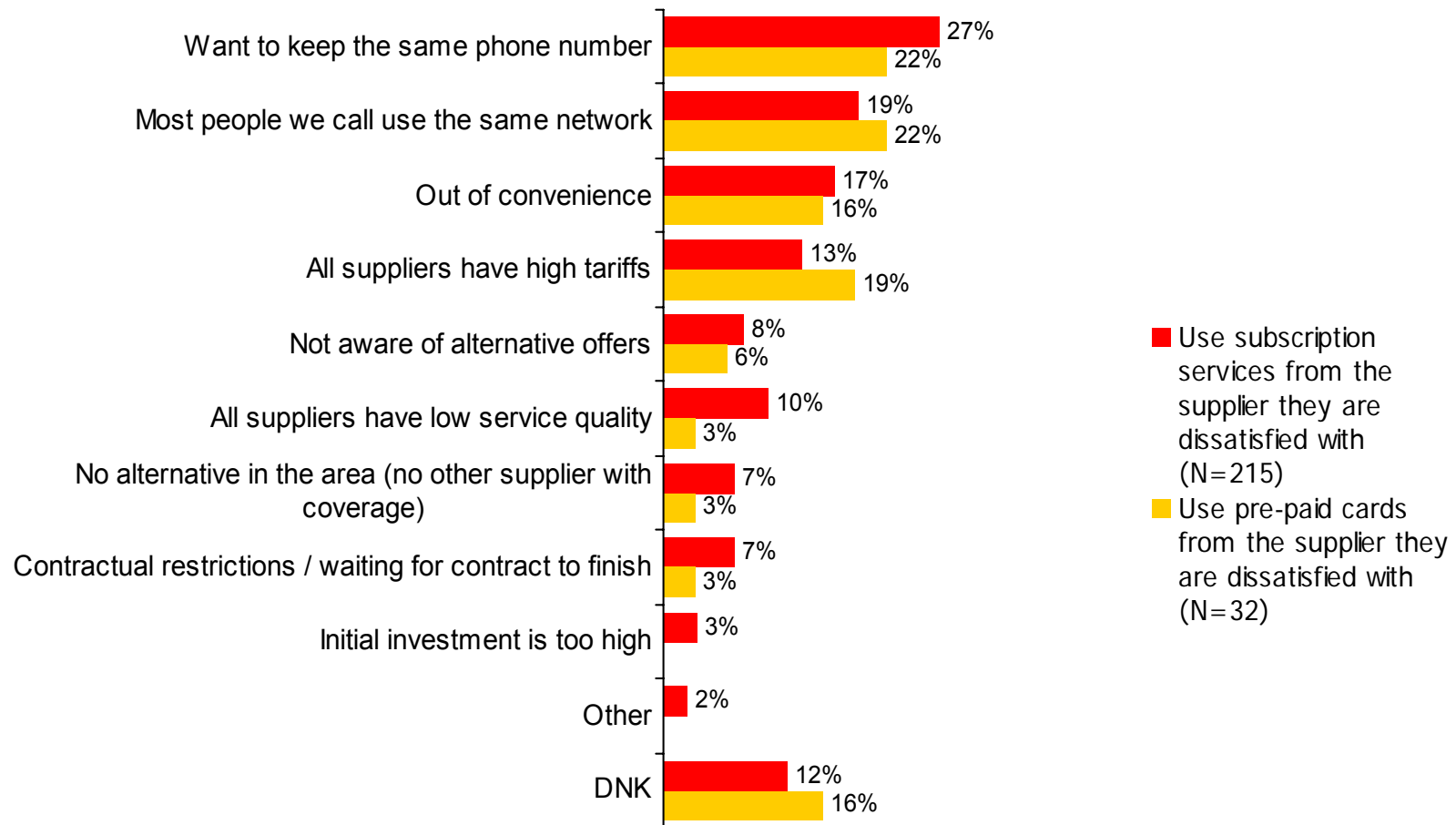
More than one answer

Obstacles against Changing Suppliers

per type of service used

You indicated you were dissatisfied with the services of a mobile telephony supplier (s). Why have you not given up their services so far?

Respondents: interviewees who are dissatisfied with their current mobile telephony supplier

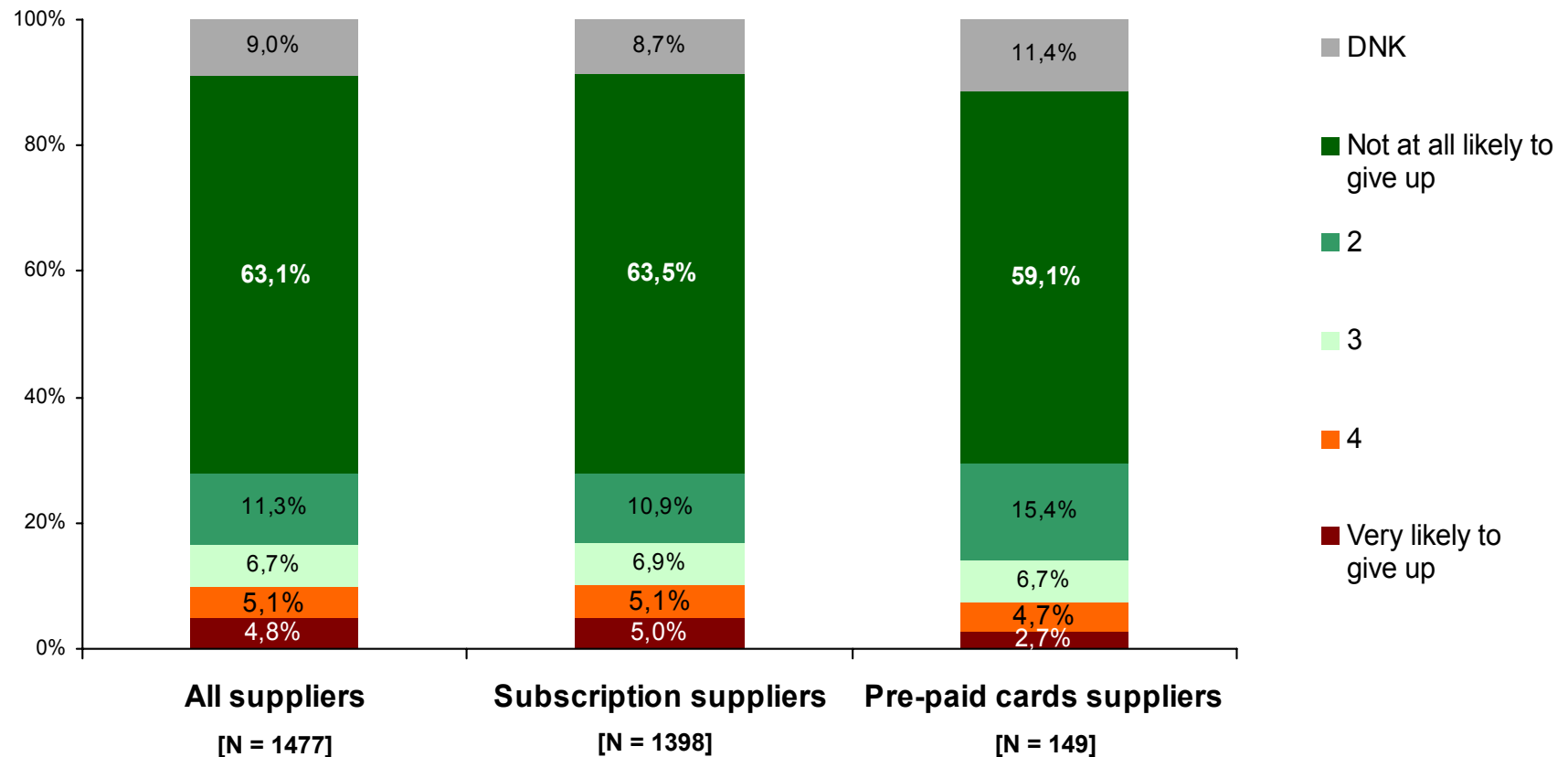


More than one answer

Intention to Give Up Mobile Telephony Supplier

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: total number of suppliers that provide services to interviewees

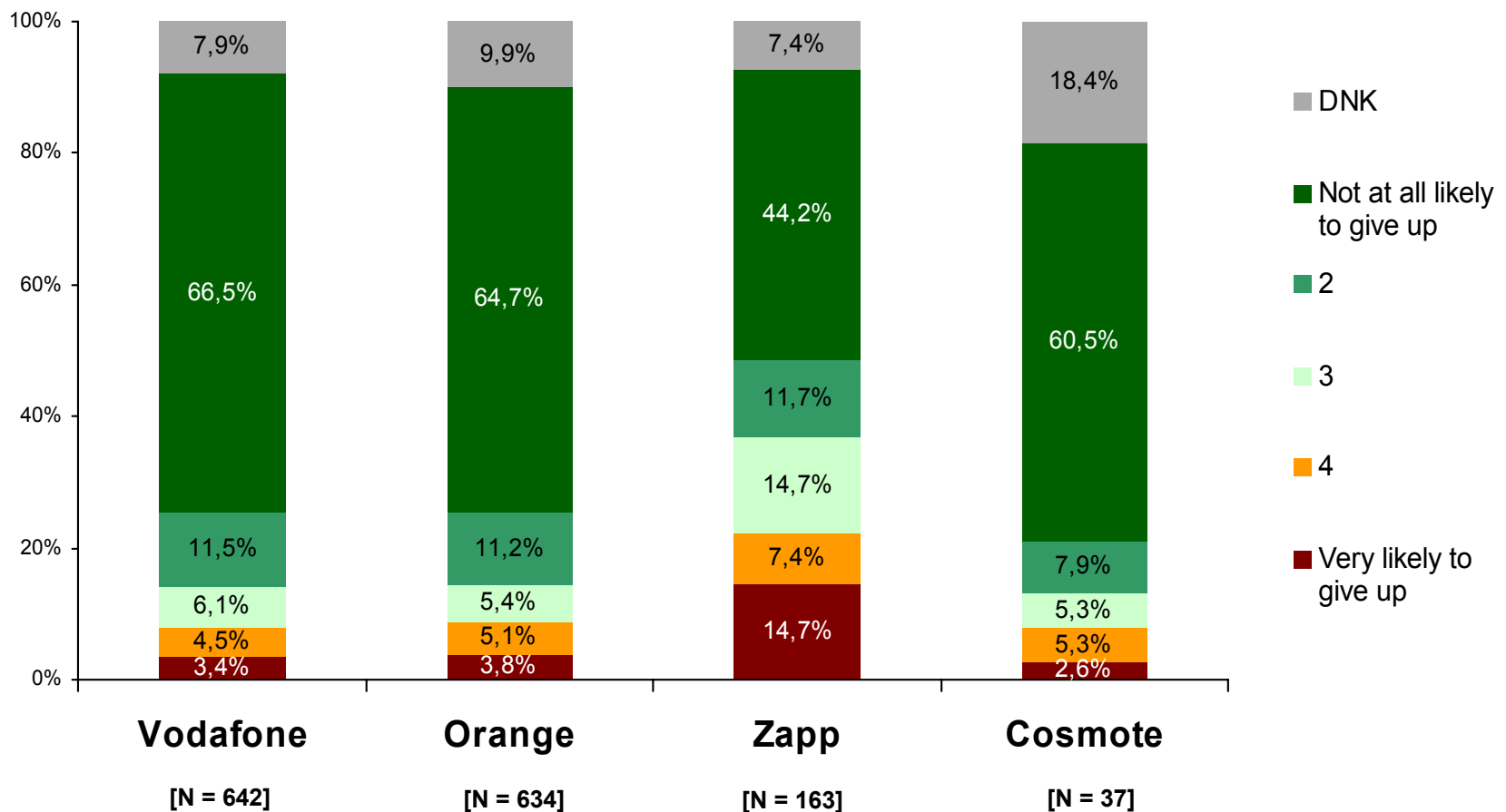


* companies which use mobile telephony services evaluated their satisfaction with each supplier. This chart presents satisfaction with all suppliers overall; a company with two suppliers has been taken into account twice with the scores that it gave for each supplier (similarly for companies with 3-4 suppliers).

Intention to Give Up Mobile Telephony Supplier's Services

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services from respective suppliers

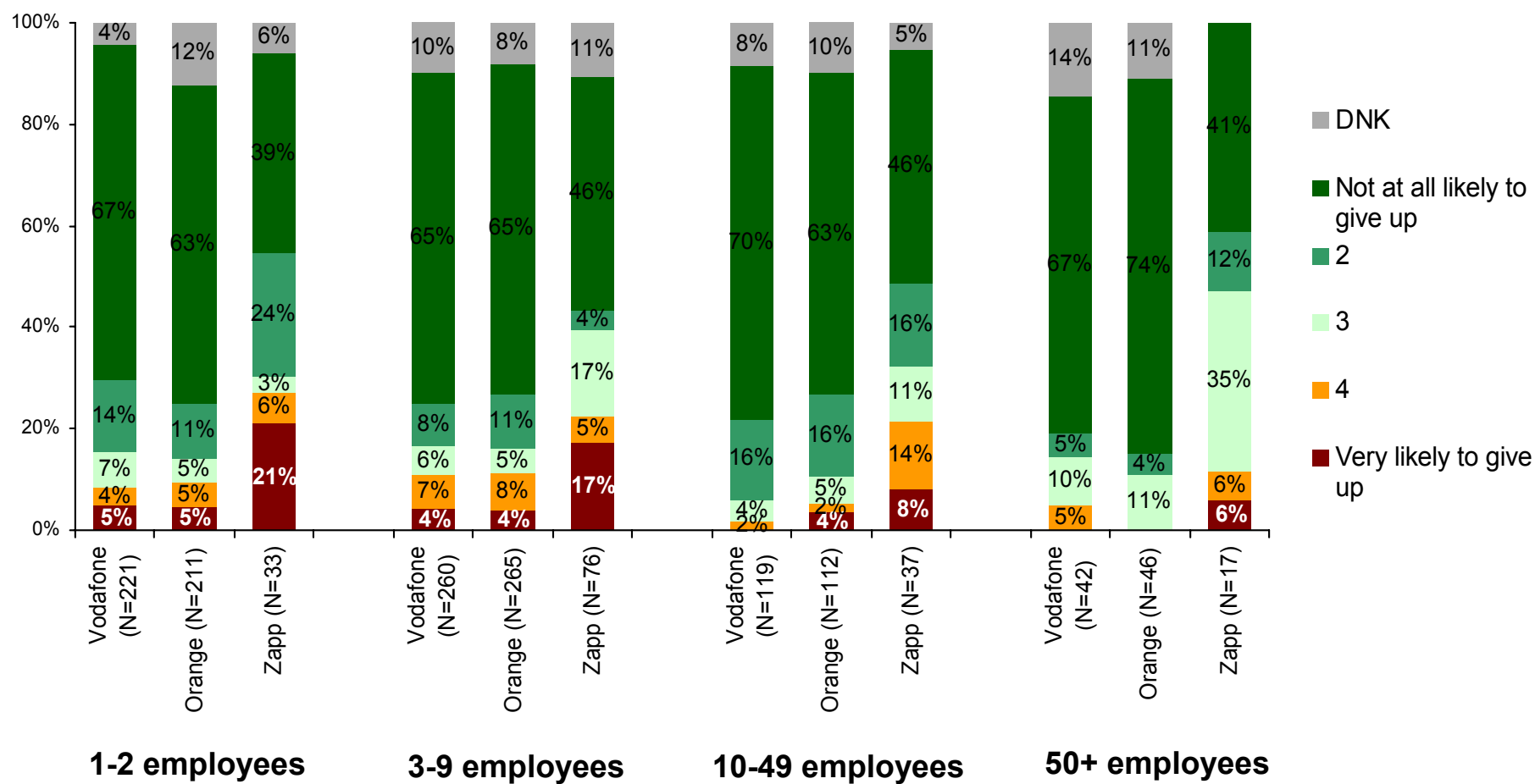


Intention to Give Up Mobile Telephony Supplier's Services

per size of company

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services from respective suppliers

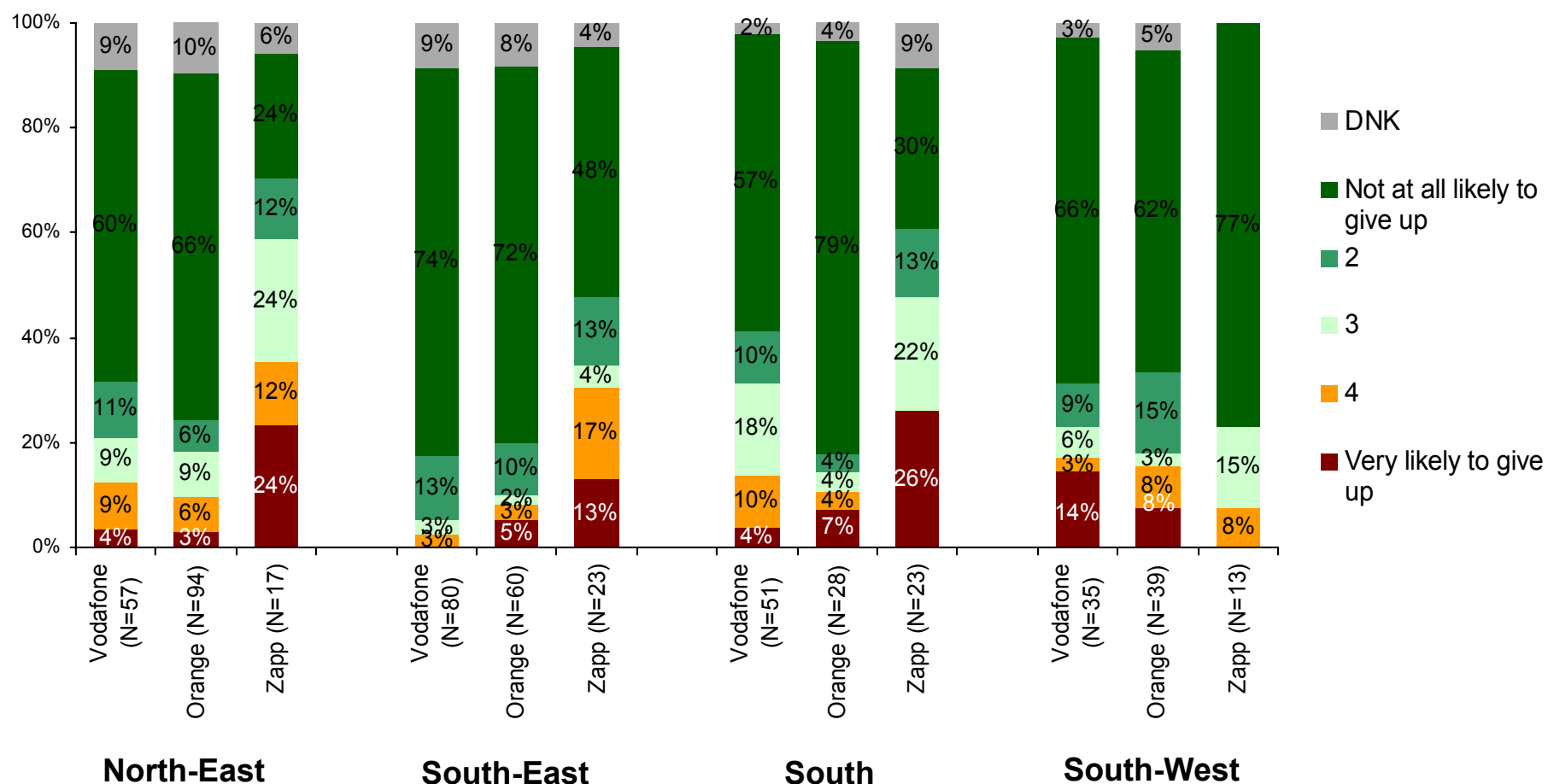


Intention to Give Up Mobile Telephony Supplier's Services

per area (1)

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services from respective suppliers

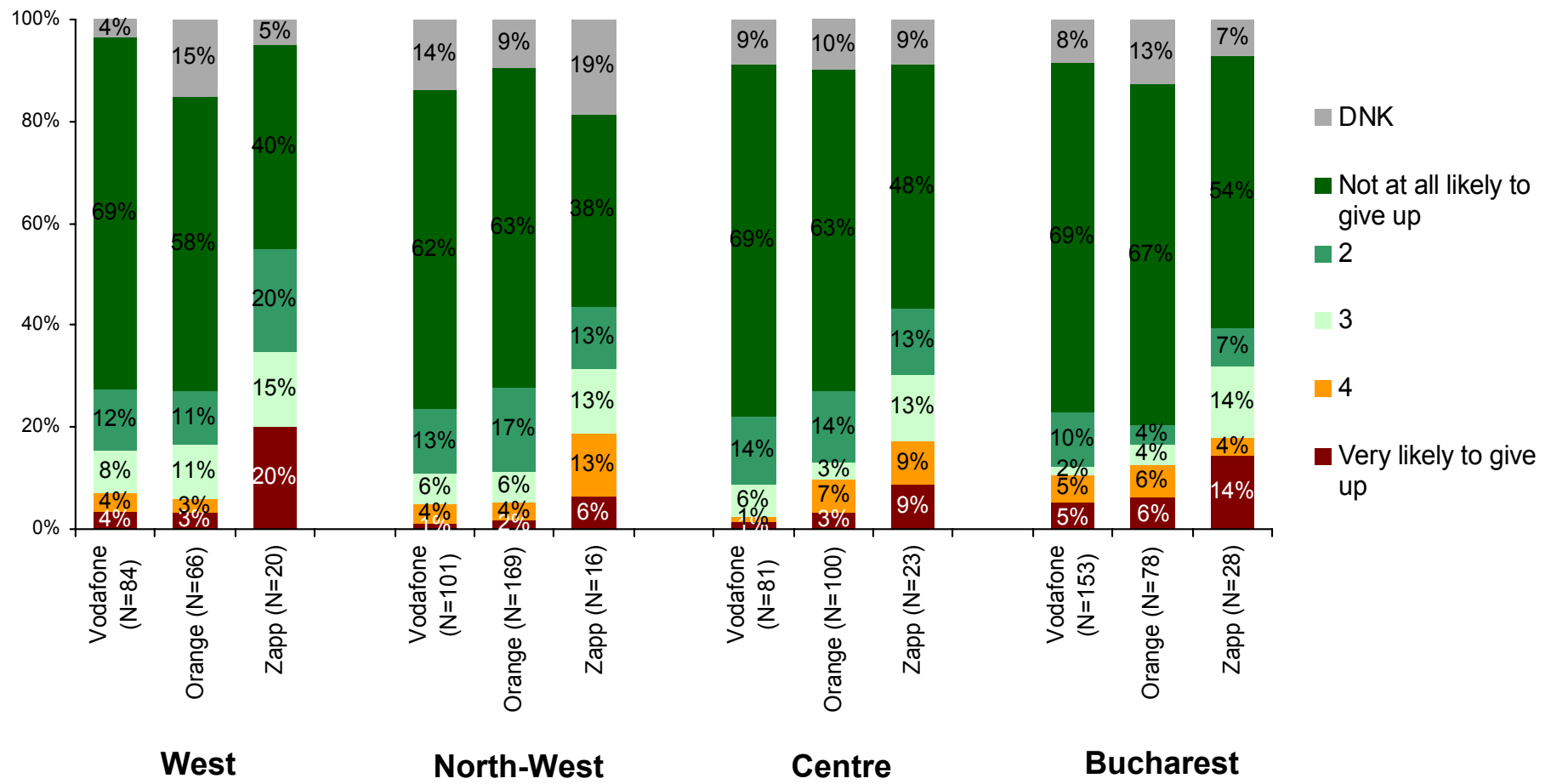


Intention to Give Up Mobile Telephony Supplier's Services

per area (2)

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

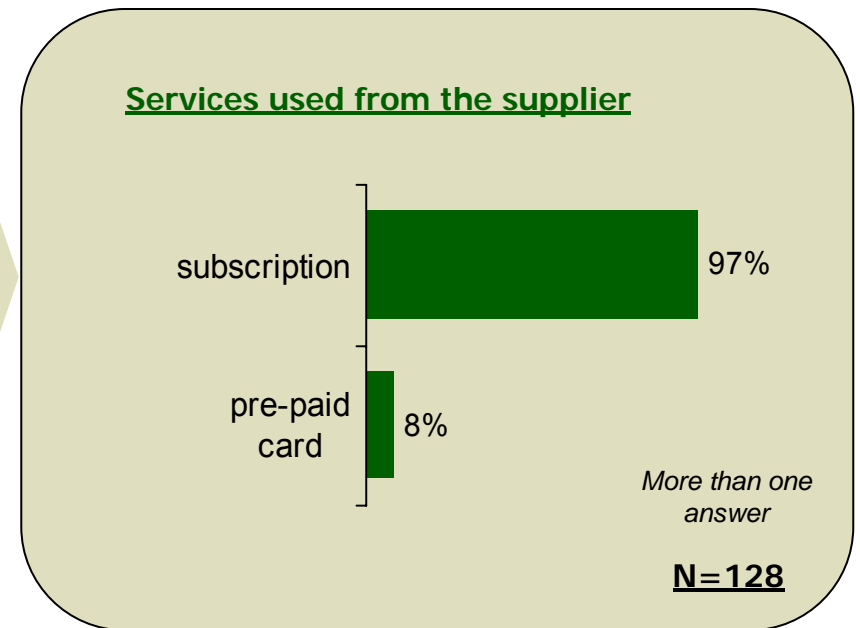
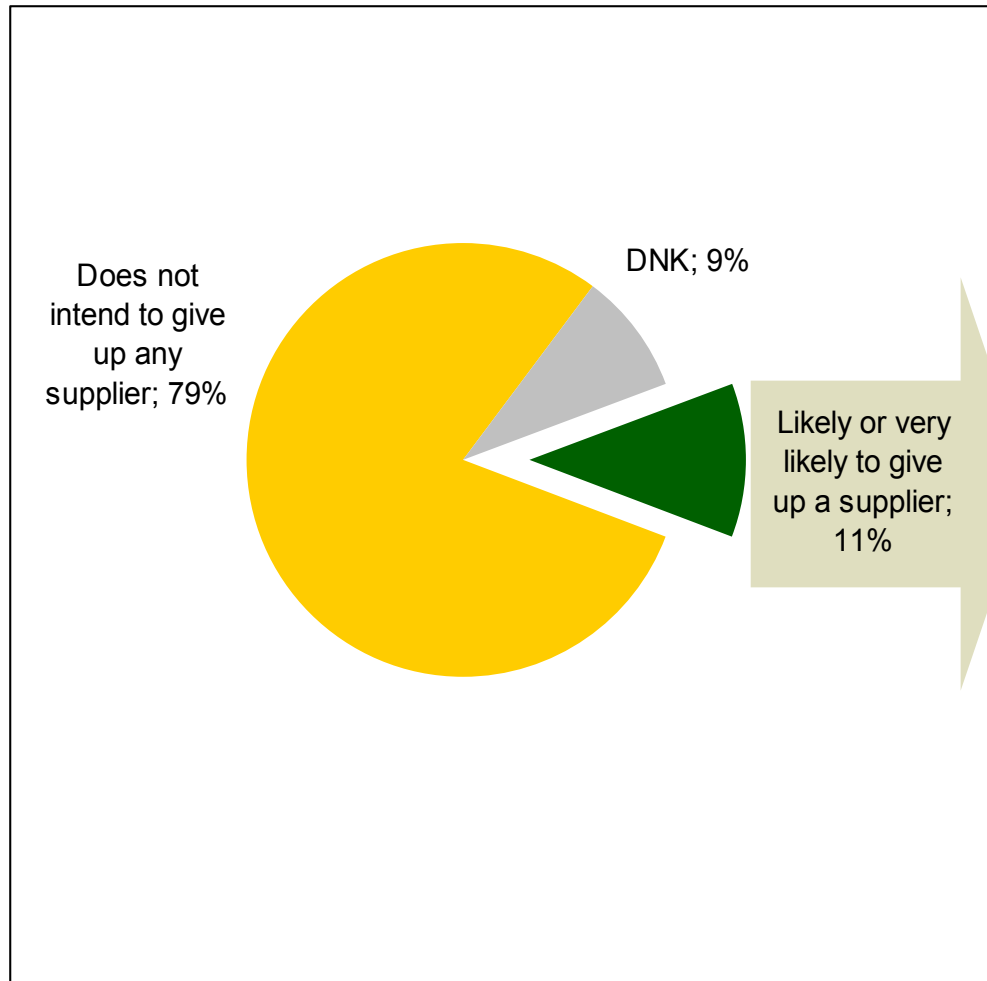
Reference: companies and institutions which use mobile telephony services from respective suppliers



Intention to Give Up Mobile Telephony Supplier's Services

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services,
N = 1124

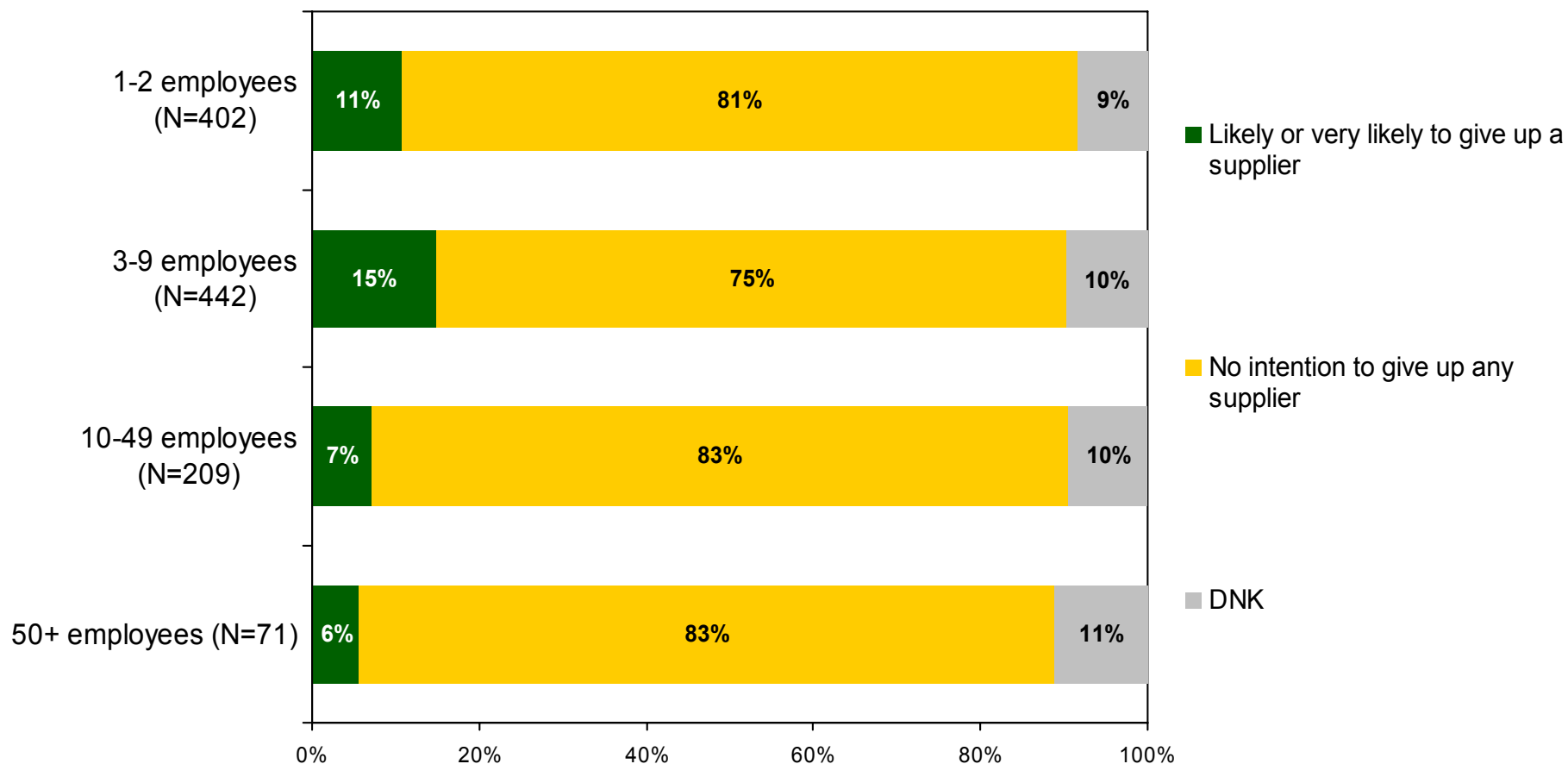


Intention to Give Up Mobile Telephony Supplier

— per size of company -

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services, per number of employees

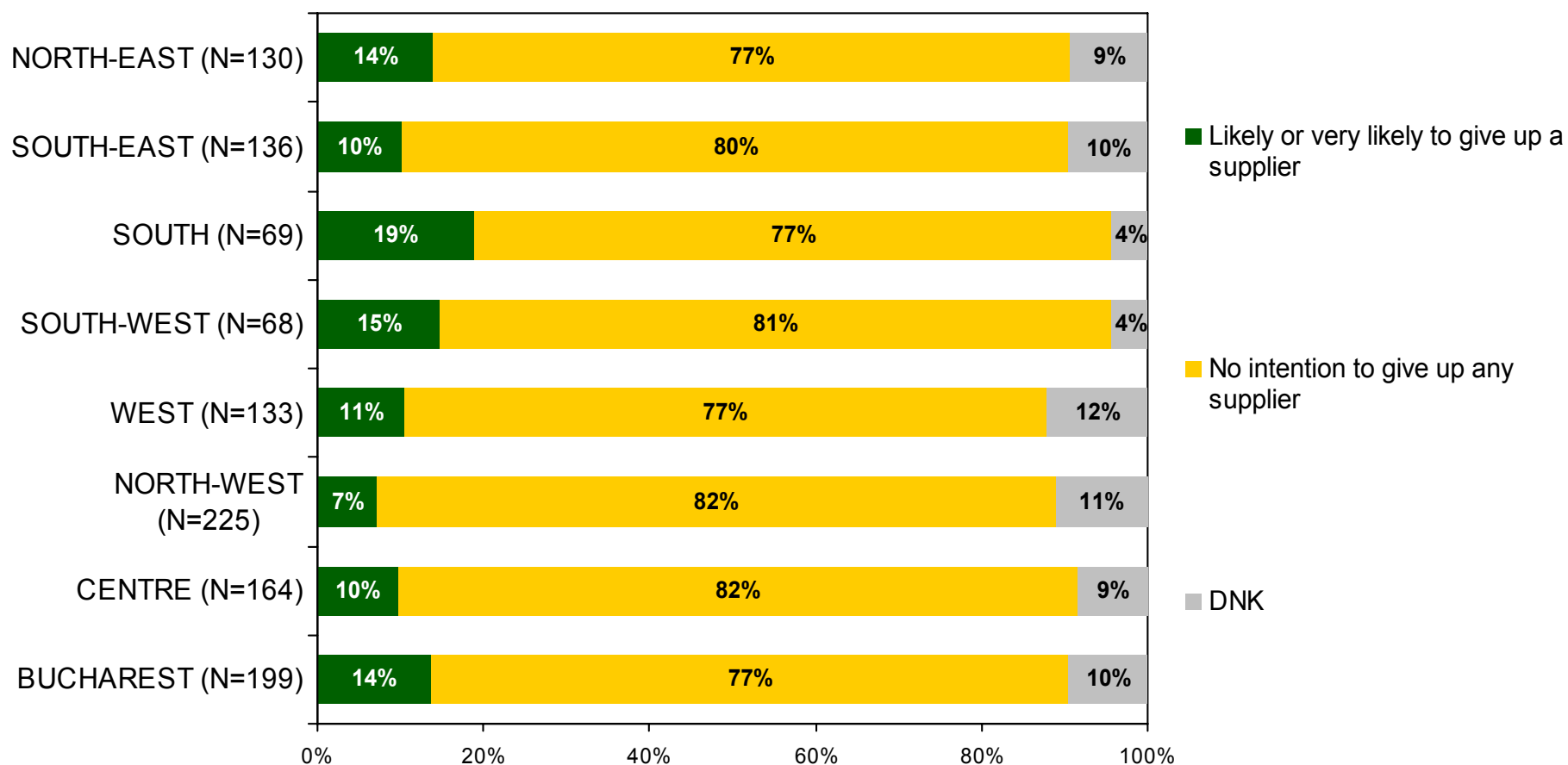


Intention to Give Up Mobile Telephony Supplier

— per area —

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

Reference: companies and institutions which use mobile telephony services, per area

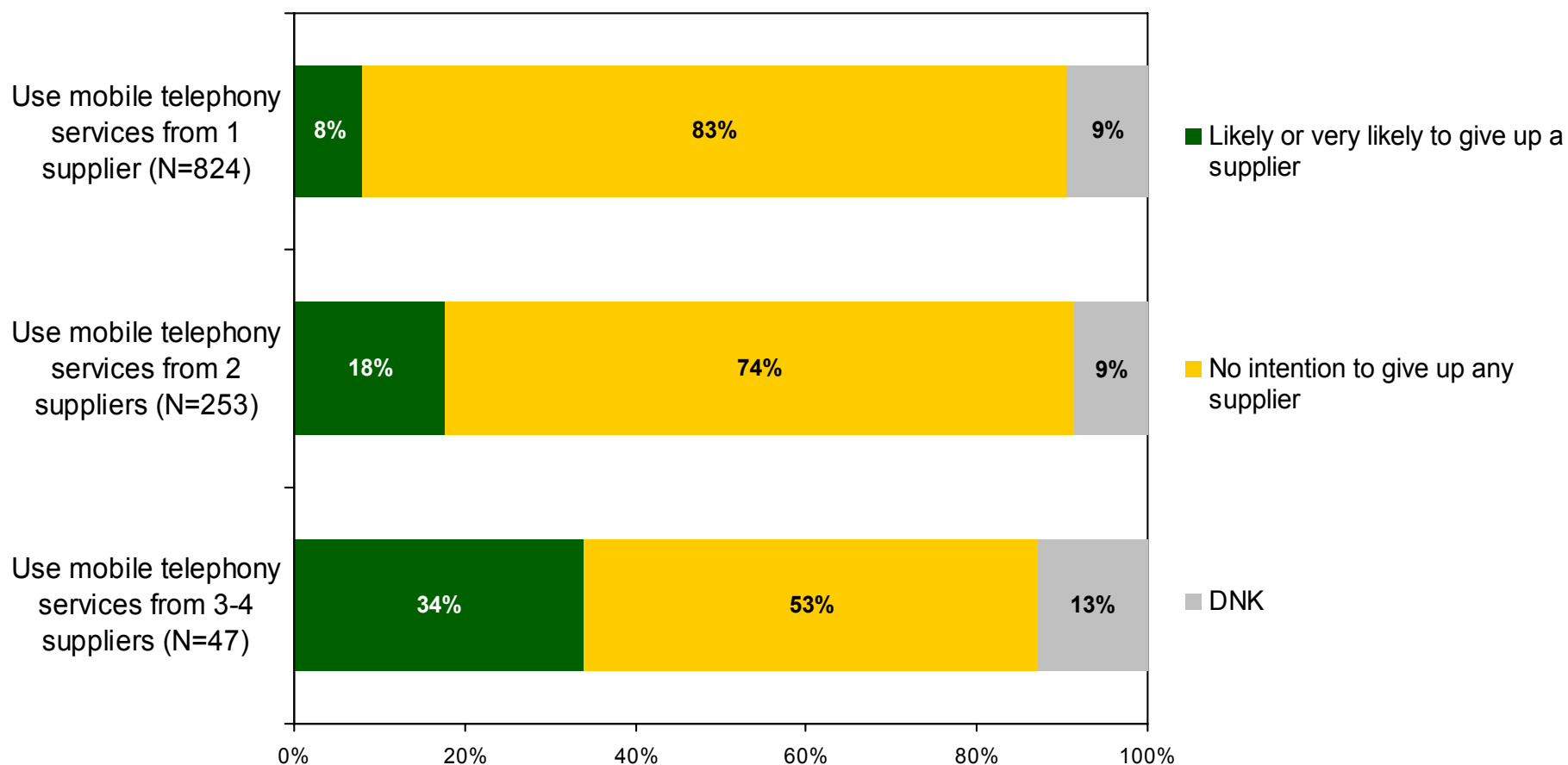


Intention to Give Up Mobile Telephony Supplier

— per number of suppliers whose services are used -

How likely are you to give up your current mobile telephony supplier (s) over the following 12 months? Please use a scale from 1 to 5 where „5” is very likely and „1” is not at all likely.

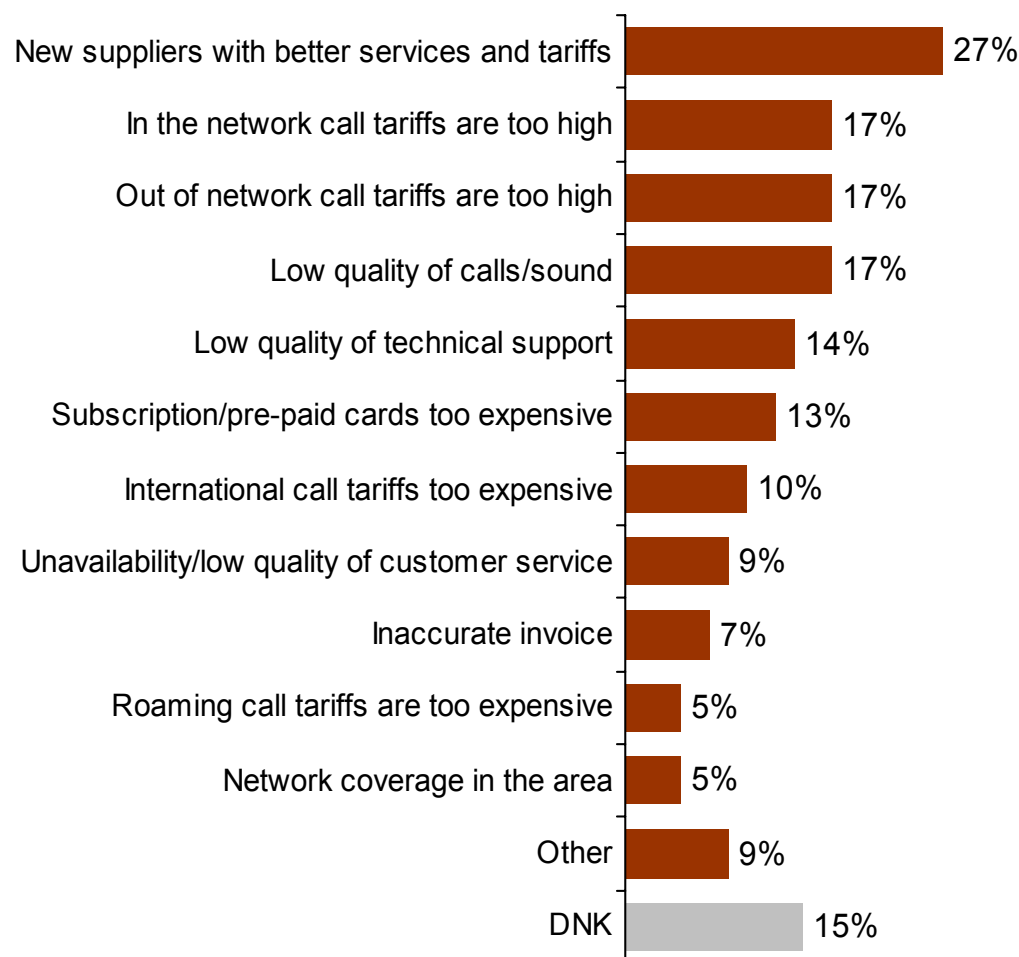
Reference: companies and institutions which use mobile telephony services, per number of suppliers they use



Main Reasons for Considering Giving Up Mobile Telephony Suppliers

What are the main reasons why you consider giving up the services of the respective mobile telephony supplier?

Reference: companies and institutions which intend to give up the services of their current supplier, N = 128

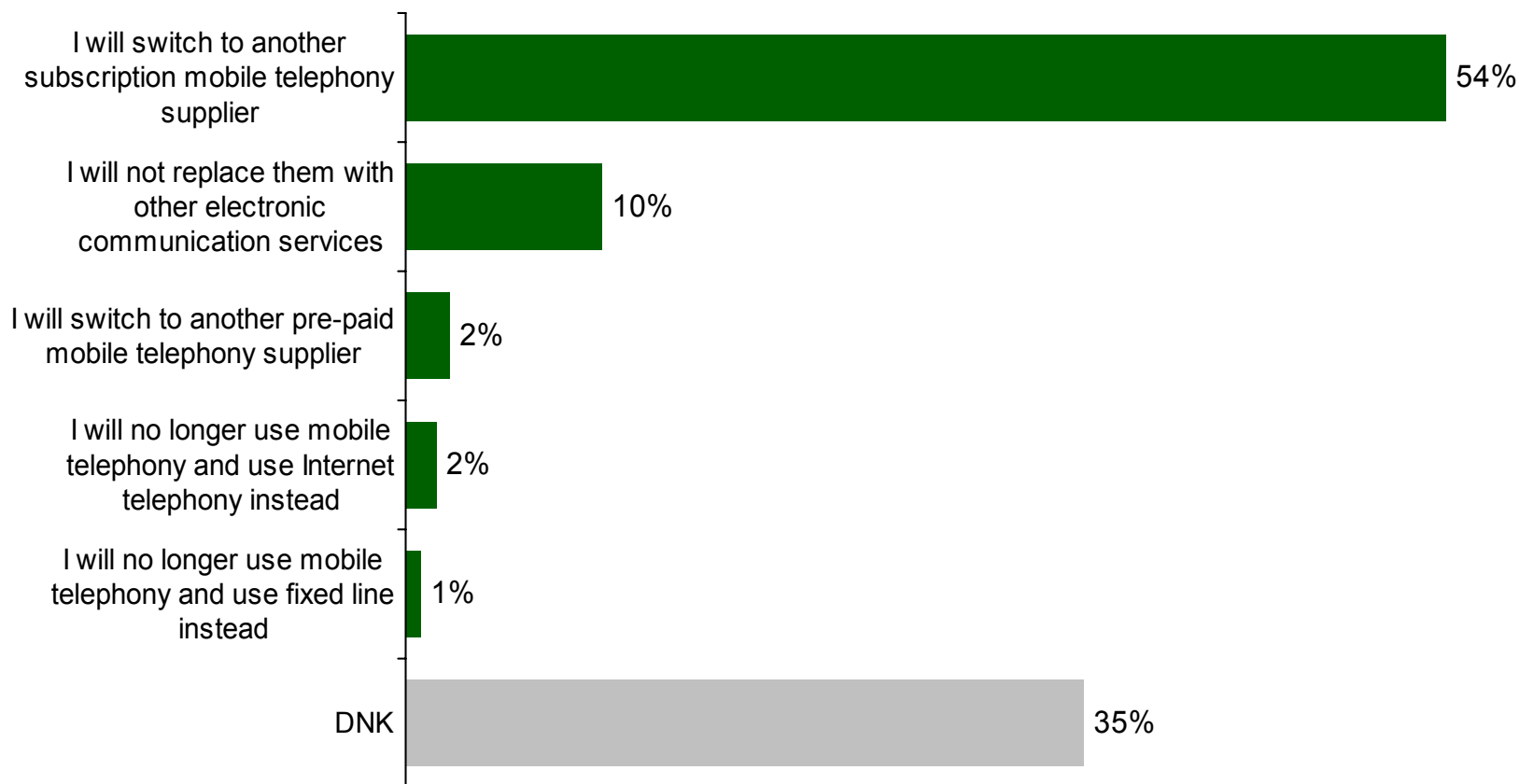


More than one answer

How Would Interviewees Replace the Services They Intend to Give Up?

How do you think you would replace the services provided by this supplier?

Reference: companies and institutions which intend to give up the services of their current supplier, N = 128



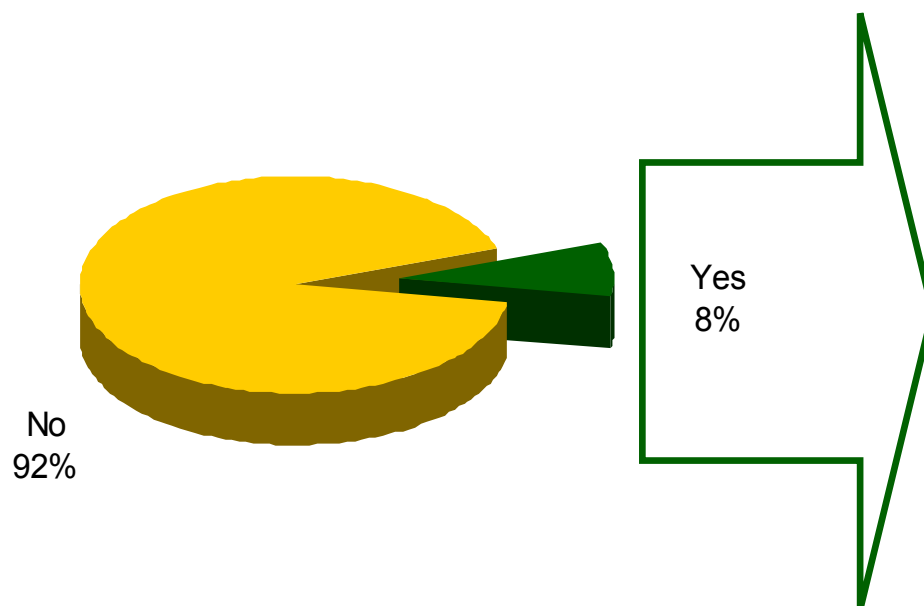
More than one answer

Have They Given Up Any Mobile Telephony Supplier over Last Year?

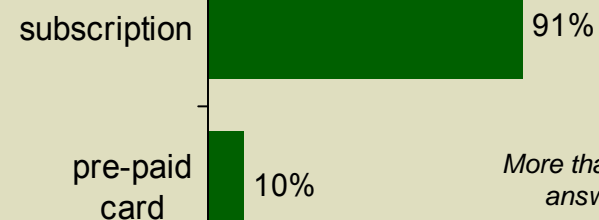
Have you given up the services of a certain mobile telephony supplier over the last 12 months? Please think both to subscription and pre-paid card suppliers.

[IF YES] Did you have subscription or pre-paid card from the supplier you changed?

Reference: companies and institutions which use mobile telephony services,
N = 1124



Services used from the respective supplier



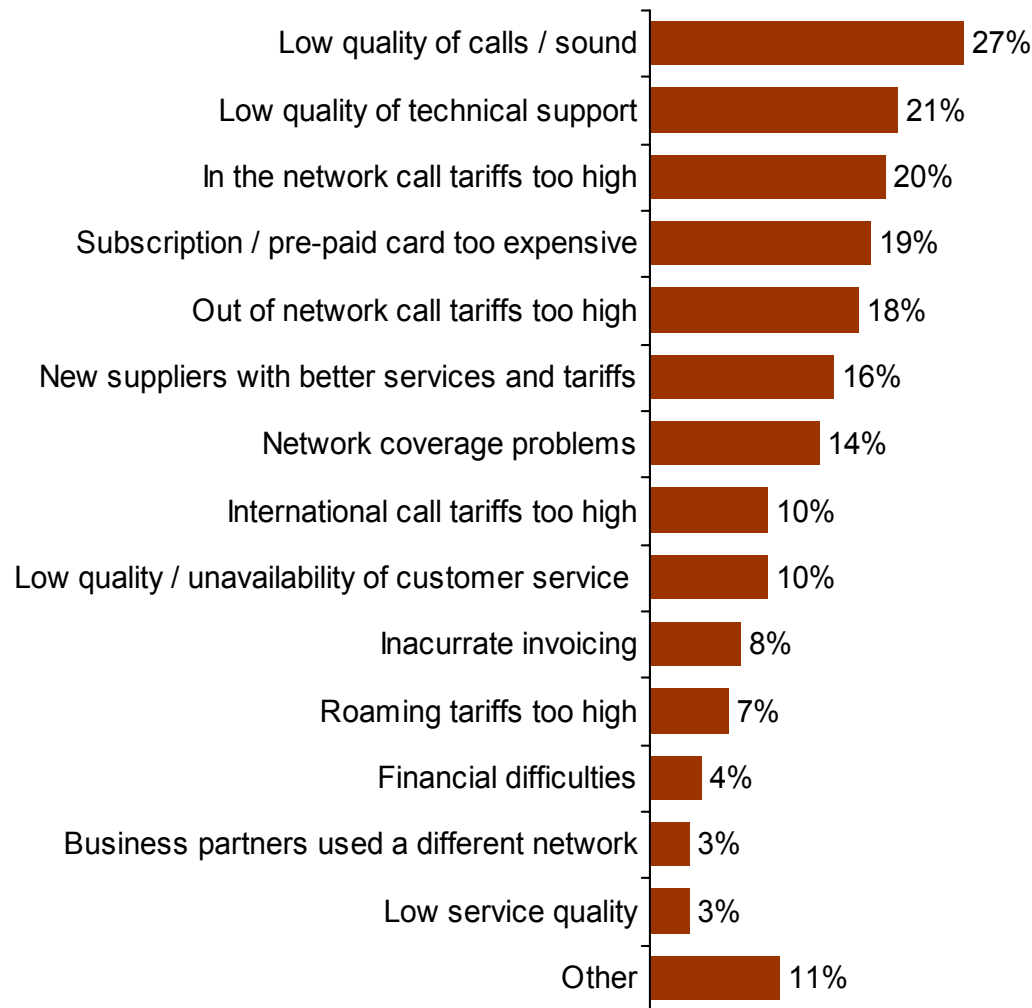
More than one answer

N=90

Main Reasons for Having Given Up Mobile Telephony Suppliers

Why have you given up the services of the respective supplier?

Reference: companies and institutions which have given up the services of a mobile telephony supplier over the last 12 months, N = 90

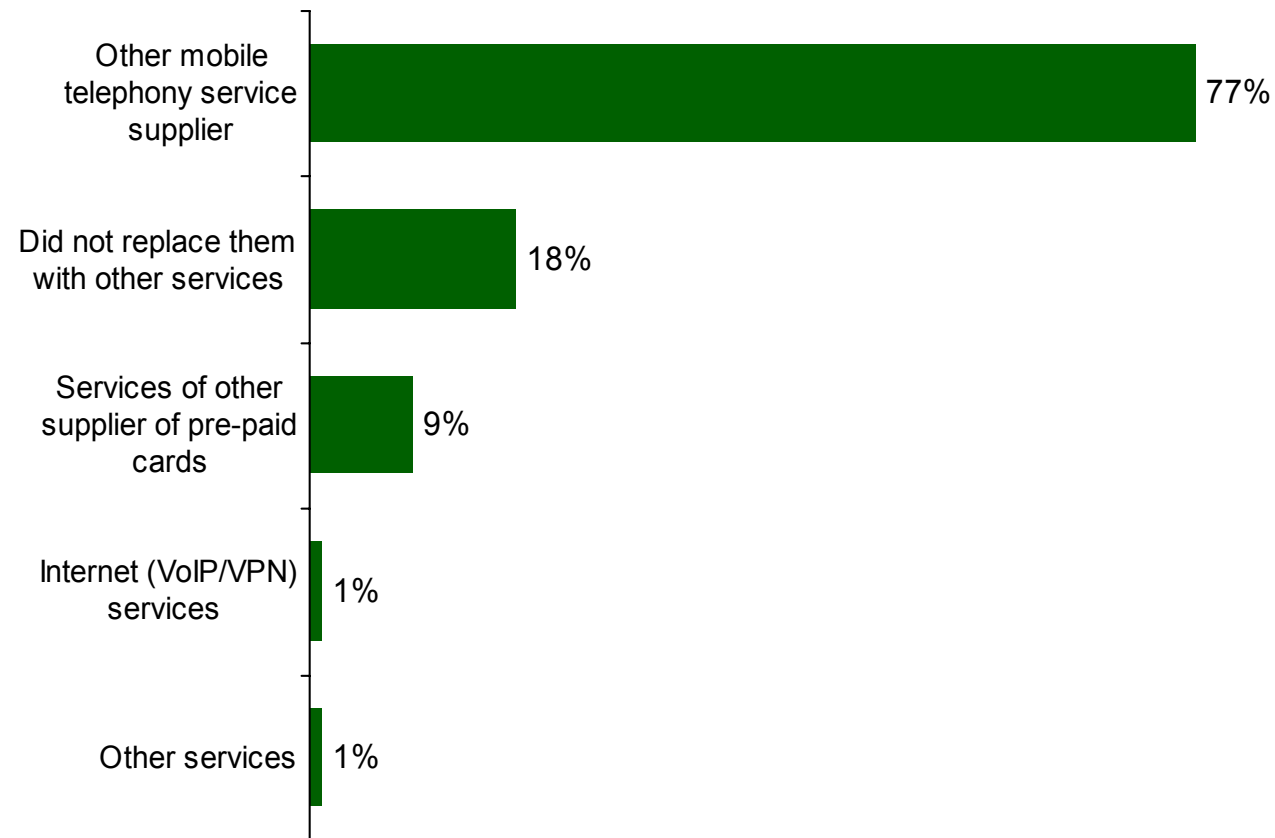


More than one answer

How Did Interviewees Replace Services They Gave Up On?

How did you replace the services you indicated you used from this supplier?

Reference: companies and institutions which gave up the services of a mobile telephony supplier over the last 12 months, N = 90



More than one answer

XI. Consumer Behavior to Tariff Increase

Consumer Behavior to Tariff Increase

- A 5% increase of subscription tariffs or calls would not generate any reaction for 58-71% of current mobile telephony users. Only a 10% increase would trigger a significant decrease of percentage of those who would not react.
- The increase of tariff would trigger two consistent type of reactions, in order of intensity: switching to another mobile telephony supplier and then switching current subscription from the same supplier to another cheaper one for specific types of calls.
- The increase of subscription and tariff for in the network and out of network calls generate changing suppliers for about 10% of companies and institutions when price and tariffs increased by 5%, 20% for 10% increase and a maximum of 28% for 20% increase. International call tariffs increase would determine a weaker reaction in terms of changing suppliers.
- Increase of subscription, in the network and out of network call tariffs would determine a similar change of subscription type from the same supplier – about 8% for an increase by 5%, 16% for a 10% increase and 19% for a 20% increase. The weakest reaction is generated by increase of international call tariffs, mainly because of the low frequency of using this service.
- Per size of company, bigger companies (over 50 companies) and public institutions register a higher inertia to change, so that increase of tariffs determine less of a reaction.

Consumer Behavior to Subscription Increase

How would you proceed if SUBSCRIPTION tariffs increased by 5%? Please refer only to price of subscription, discounting costs of calls. How about 10%? How about 20%?

Reference: companies and institutions which use subscription mobile telephony services, N = 1076

Behavior ↓	Tariff increase →	5%	10%	20%
Will do nothing, it does not affect us		65,9%	39,2%	28,7%
Will limit/restrict calls from these subscriptions without replacing them with other means of communication		7,8%	13,1%	10,0%
Will limit/restrict calls from these subscriptions and use fixed line to call		1,5%	2,7%	2,6%
Will change current subscriptions with cheaper ones from same supplier		8,6%	16,4%	19,2%
Will give up these subscriptions and use pre-paid cards from the same supplier		1,0%	1,8%	2,5%
Will change this supplier with another mobile telephony supplier		8,6%	18,4%	26,8%
Will give up using mobile telephony and use fixed line instead		0,1%	0,5%	1,0%
Other		2,2%	3,1%	3,6%
DNK		4,2%	4,9%	5,5%
TOTAL		100%	100%	100%

Consumer Behavior to In the Network Call Tariff Increase

How would you proceed if in the network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: companies and institutions which use mobile telephony services, N = 1124

Behavior ↓	Tariff increase →	5%	10%	20%
Will do nothing, it does not affect us		59,8%	33,2%	22,5%
Will limit/restrict calls from these subscriptions (current cards) without replacing them with other means of communication		8,0%	13,3%	11,3%
Will limit/restrict calls from these subscriptions (current cards) and use fixed line to call		1,5%	3,2%	2,9%
Will change current subscriptions with cheaper ones for IN THE NETWORK calls from same supplier , without limiting the type of call		8,5%	15,9%	19,3%
Will change this supplier with another mobile telephony supplier		10,7%	20,6%	29,3%
Will give up using mobile telephony and use fixed line instead		0,4%	0,7%	0,7%
Other		2,8%	3,6%	4,2%
DNK		8,4%	9,5%	9,8%
TOTAL		100%	100%	100%

Consumer Behavior to Out of Network Call Tariff Increase

How would you proceed if out of network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: companies and institutions which use mobile telephony services, N = 1124

Behavior ↓	Tariff increase →	5%	10%	20%
Will do nothing, it does not affect us		57,8%	32,7%	23,8%
Will limit/restrict calls from these subscriptions (current cards) without replacing them with other means of communication		9,1%	14,0%	11,9%
Will limit/restrict calls from these subscriptions (current cards) and use fixed line to call		1,6%	3,1%	2,8%
Will change current subscriptions with cheaper ones for OUT OF NETWORK calls from same supplier , without limiting the type of call		8,3%	15,7%	18,2%
Will change this supplier with another mobile telephony supplier		10,9%	20,9%	28,4%
Will give up using mobile telephony and use fixed line instead		0,8%	0,9%	1,2%
Other		2,6%	3,3%	3,9%
DNK		8,9%	9,5%	9,6%
TOTAL		100%	100%	100%

Consumer Behavior to International Call Tariff Increase

How would you proceed if international call tariffs increased by 5%?
How about 10%? How about 20%?

Reference: companies and institutions which use
mobile telephony services, N = 1124

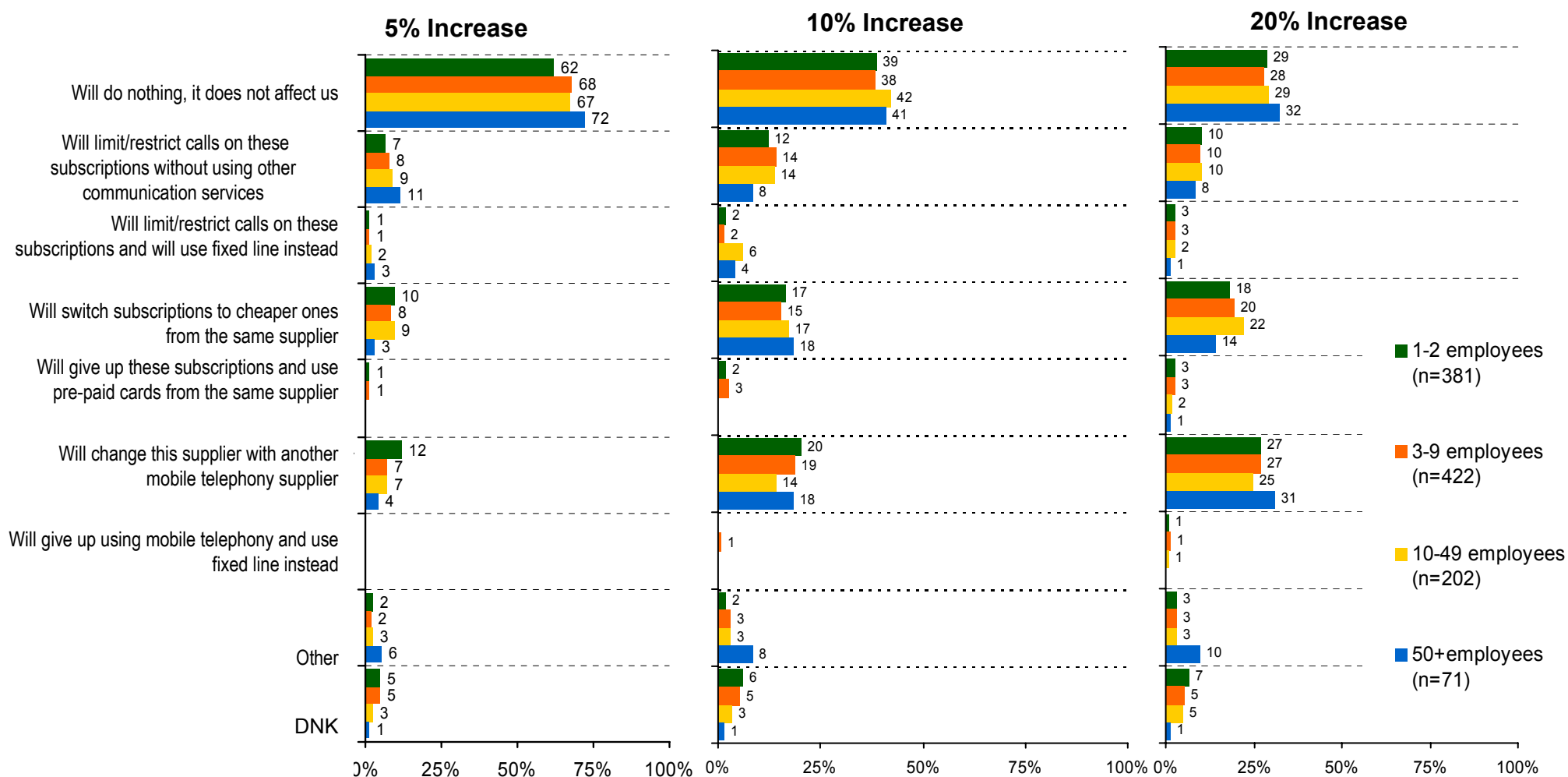
Behavior ↓	Tariff increase →	5%	10%	20%
Will do nothing, it does not affect us		70,6%	57,5%	54,1%
Will limit/restrict calls from these subscriptions (current cards) without replacing them with other means of communication		4,1%	6,4%	5,5%
Will limit/restrict calls from these subscriptions (current cards) and use fixed line to call		1,0%	2,0%	2,3%
Will change current subscriptions with cheaper ones for INTERNATIONAL calls from same supplier , without limiting the type of call		4,6%	8,3%	8,5%
Will change this supplier with another mobile telephony supplier		7,2%	11,8%	15,3%
Will give up using mobile telephony and use fixed line instead		0,5%	0,9%	0,9%
Other		2,9%	3,4%	3,7%
DNK		9,1%	9,7%	9,7%
TOTAL		100%	100%	100%

Consumer Behavior to Subscription Increase

per size of company

How would you proceed if SUBSCRIPTION tariffs increased by 5%? How about 10%? How about 20%?

Reference: companies and institutions which use subscription mobile telephony services per size of company, N = 1076

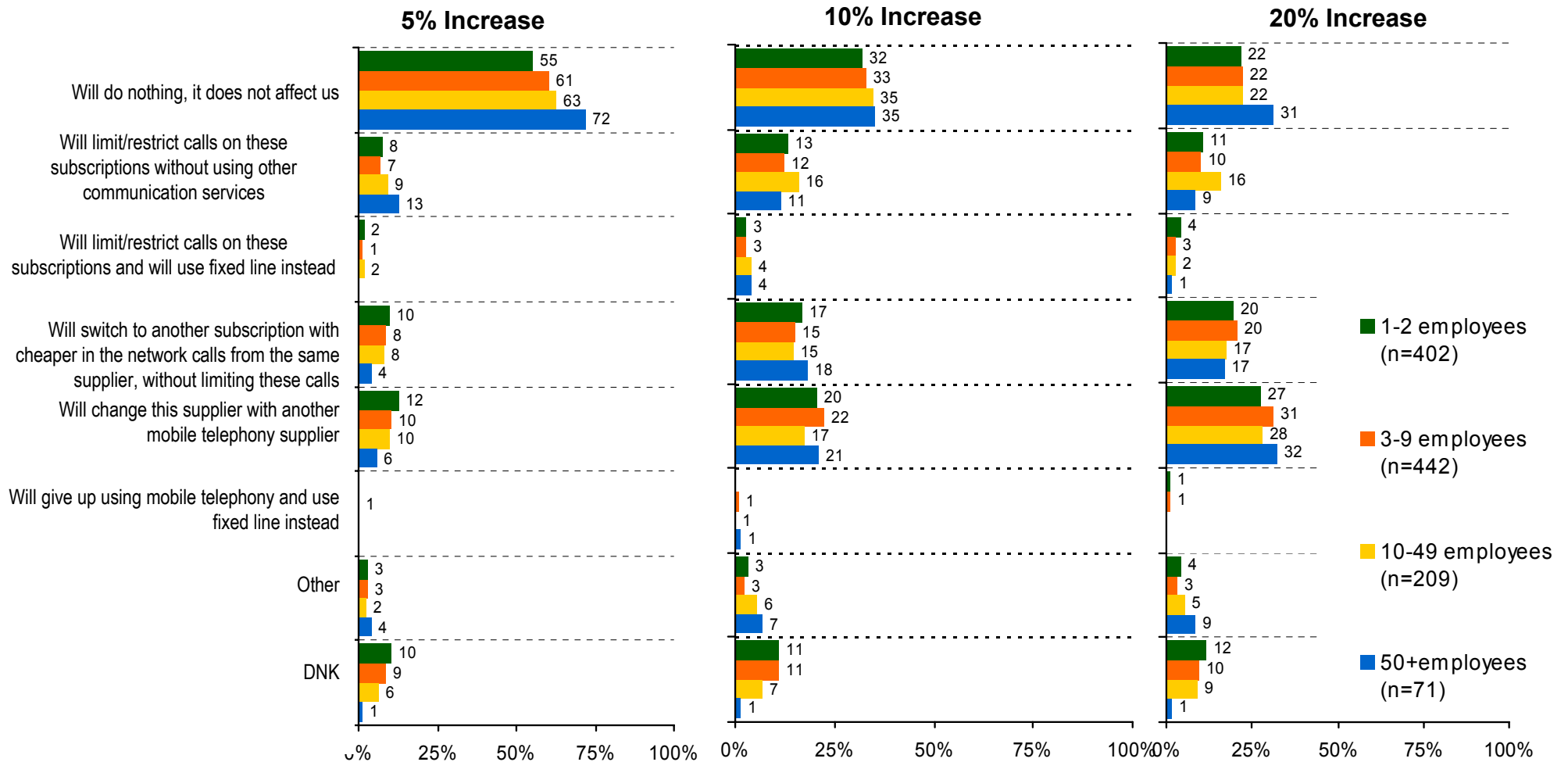


Consumer Behavior to In the Network Call Tariff Increase

per size of company

How would you proceed if in the network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company N = 1124

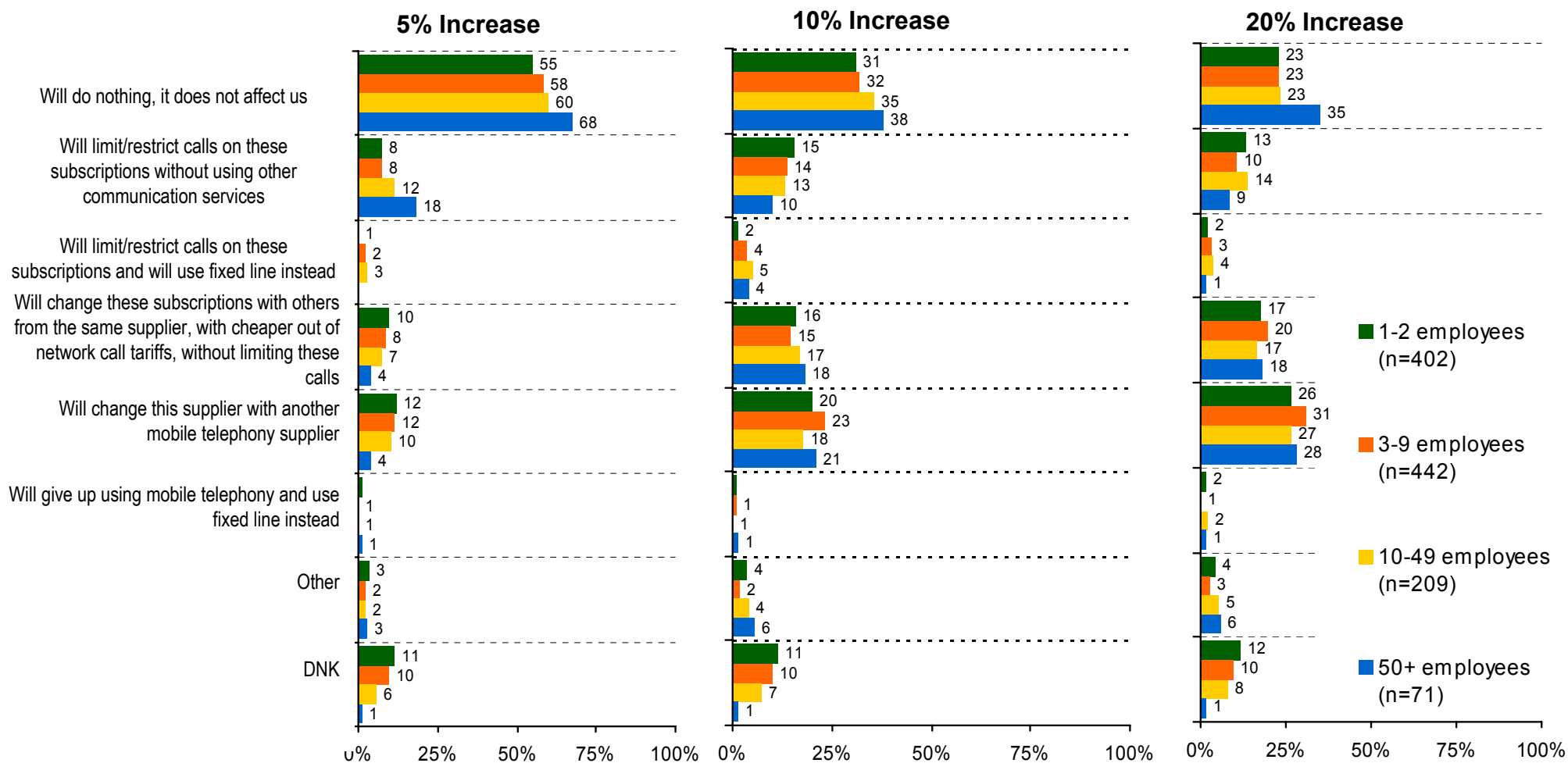


Consumer Behavior to Out of Network Call Tariff Increase

per size of company

How would you proceed if out of network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company N = 1124



THE GALLUP ORGANIZATION

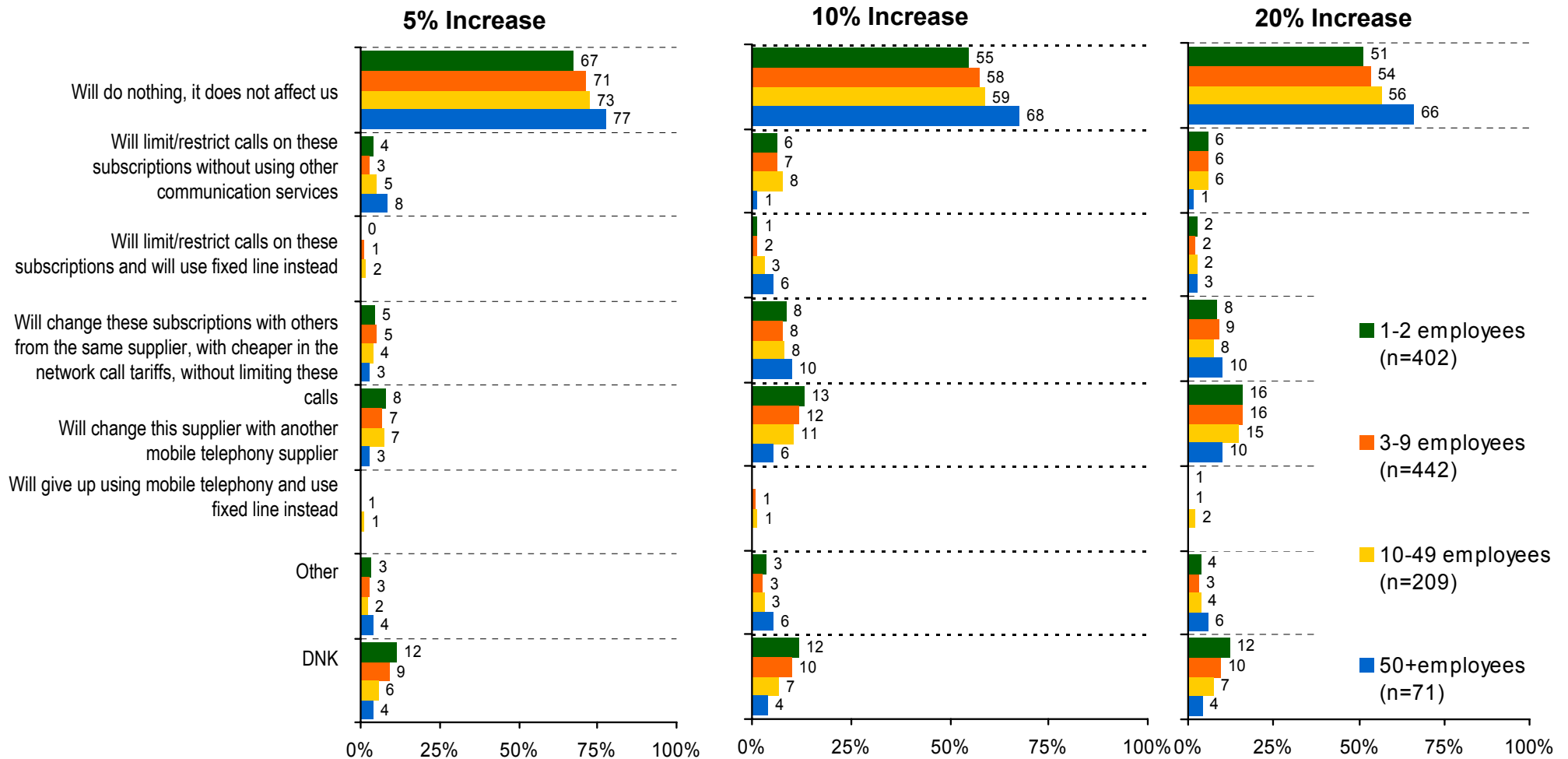
ROMANIA

Consumer Behavior to International Call Tariff Increase

per size of company

How would you proceed if international call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company N = 1124

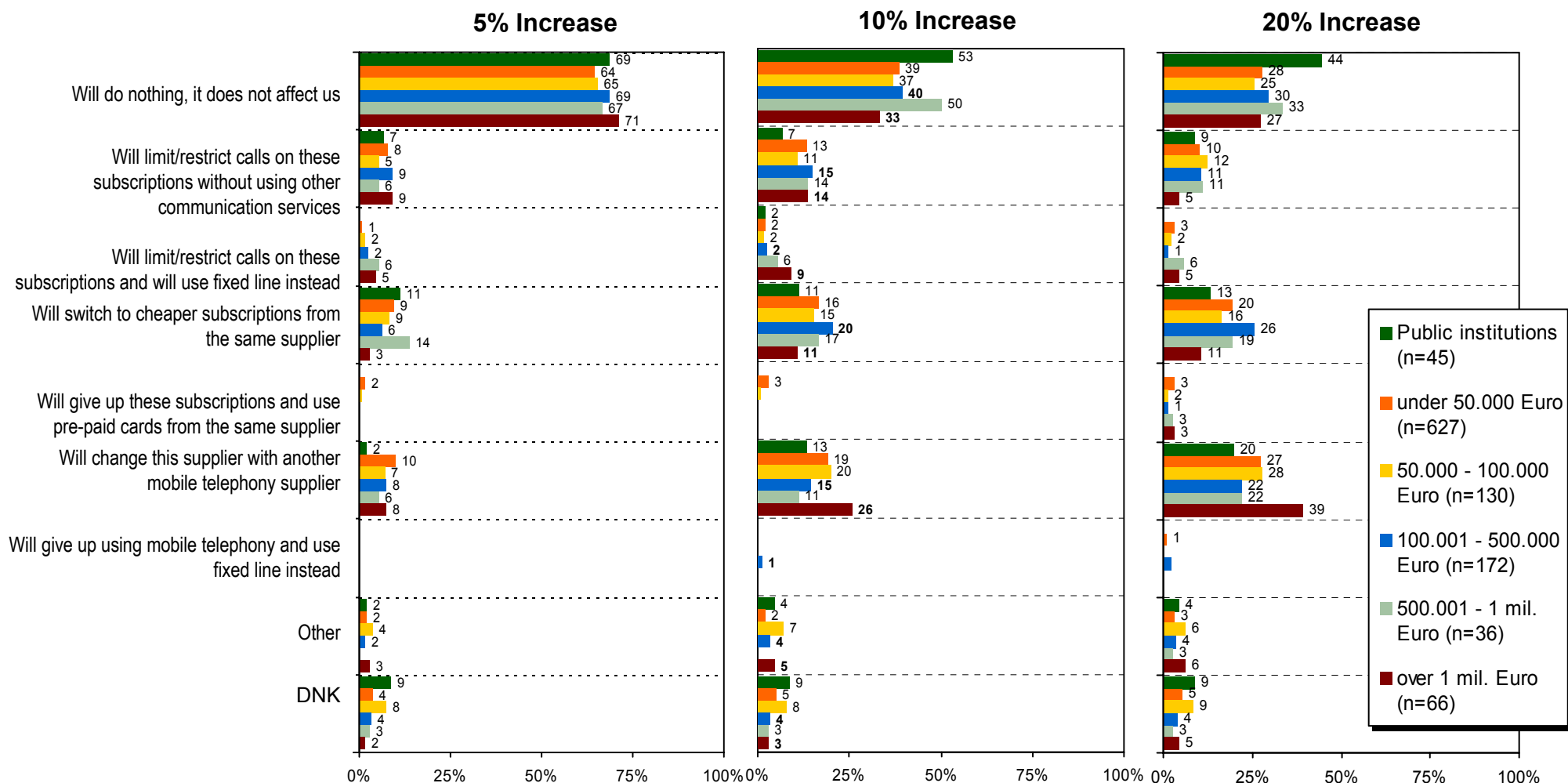


Consumer Behavior to Subscription Increase

per revenue

How would you proceed if SUBSCRIPTION tariffs increased by 5%? How about 10%? How about 20%?

Reference: companies and institutions which use subscription mobile telephony services per size of company, N = 1076



THE GALLUP ORGANIZATION

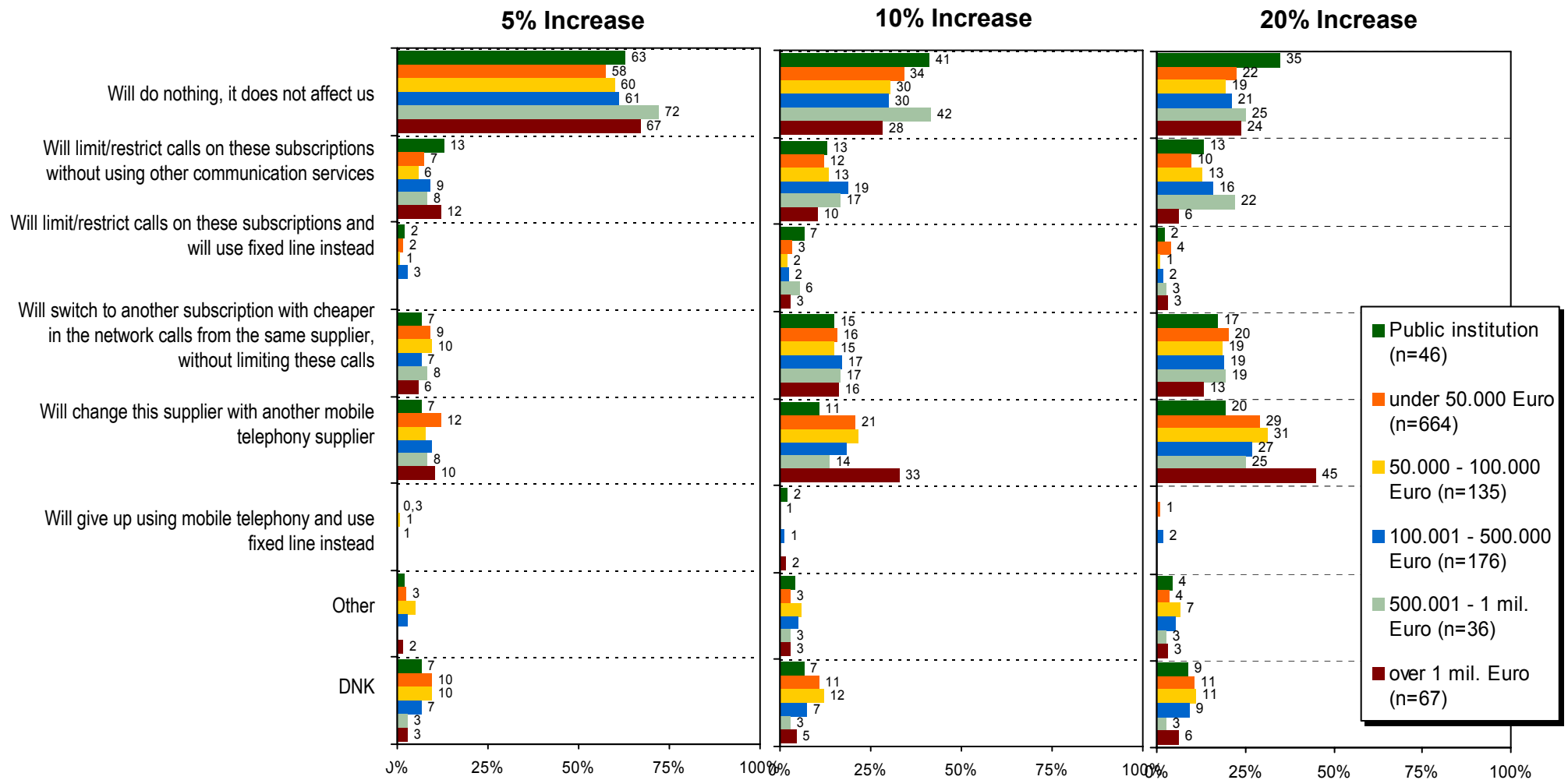
ROMANIA

Consumer Behavior to In the Network Call Tariff Increase

per revenue

How would you proceed if in the network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company, N = 1124

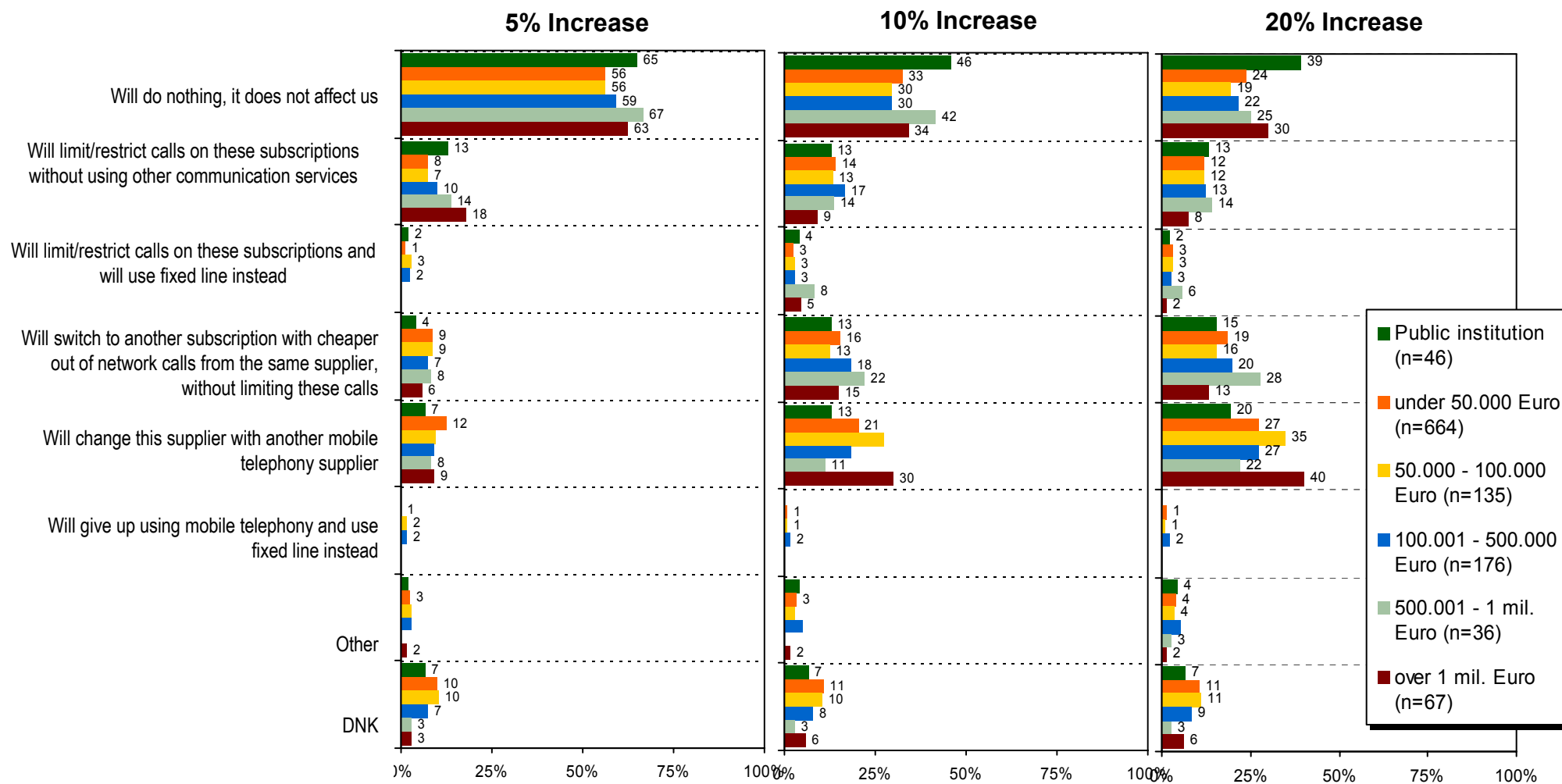


Consumer Behavior to Out of Network Call Tariff Increase

per revenue

How would you proceed if out of network call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company N = 1124

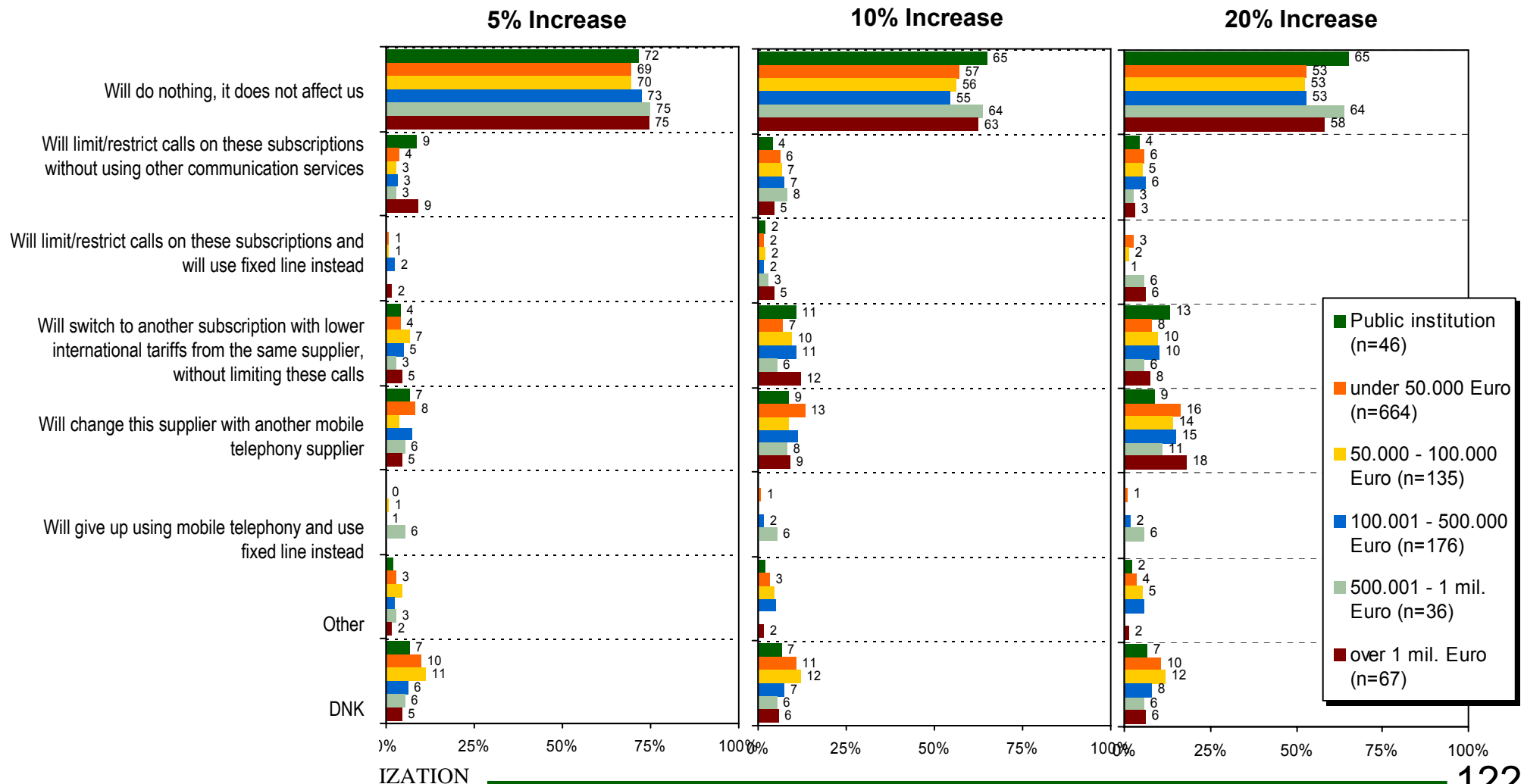


Consumer Behavior to International Call Tariff Increase

per revenue

How would you proceed if international call tariffs increased by 5%? How about 10%? How about 20%?

Reference: sample of companies and institutions per size of company, N = 1124

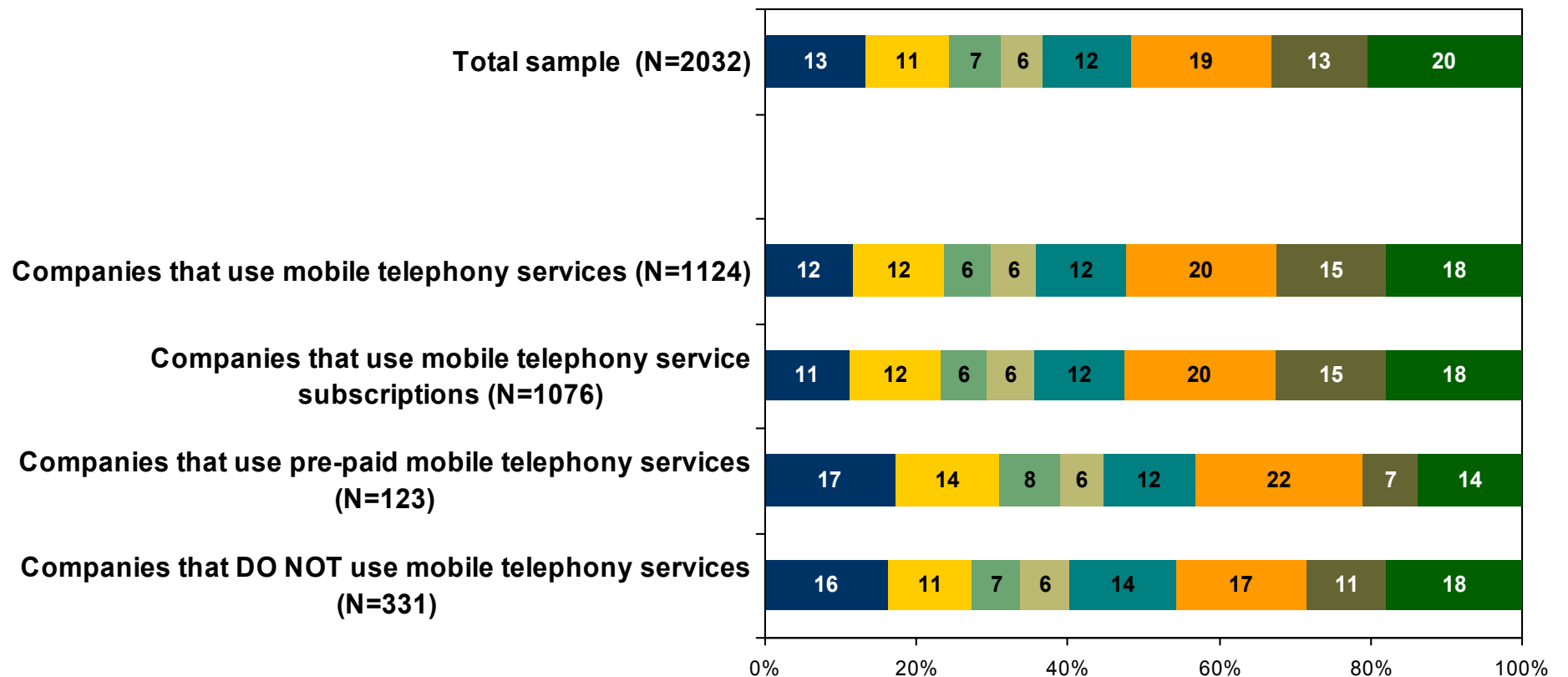


XII. Profile of Companies and Institutions that Use Mobile Telephony Services

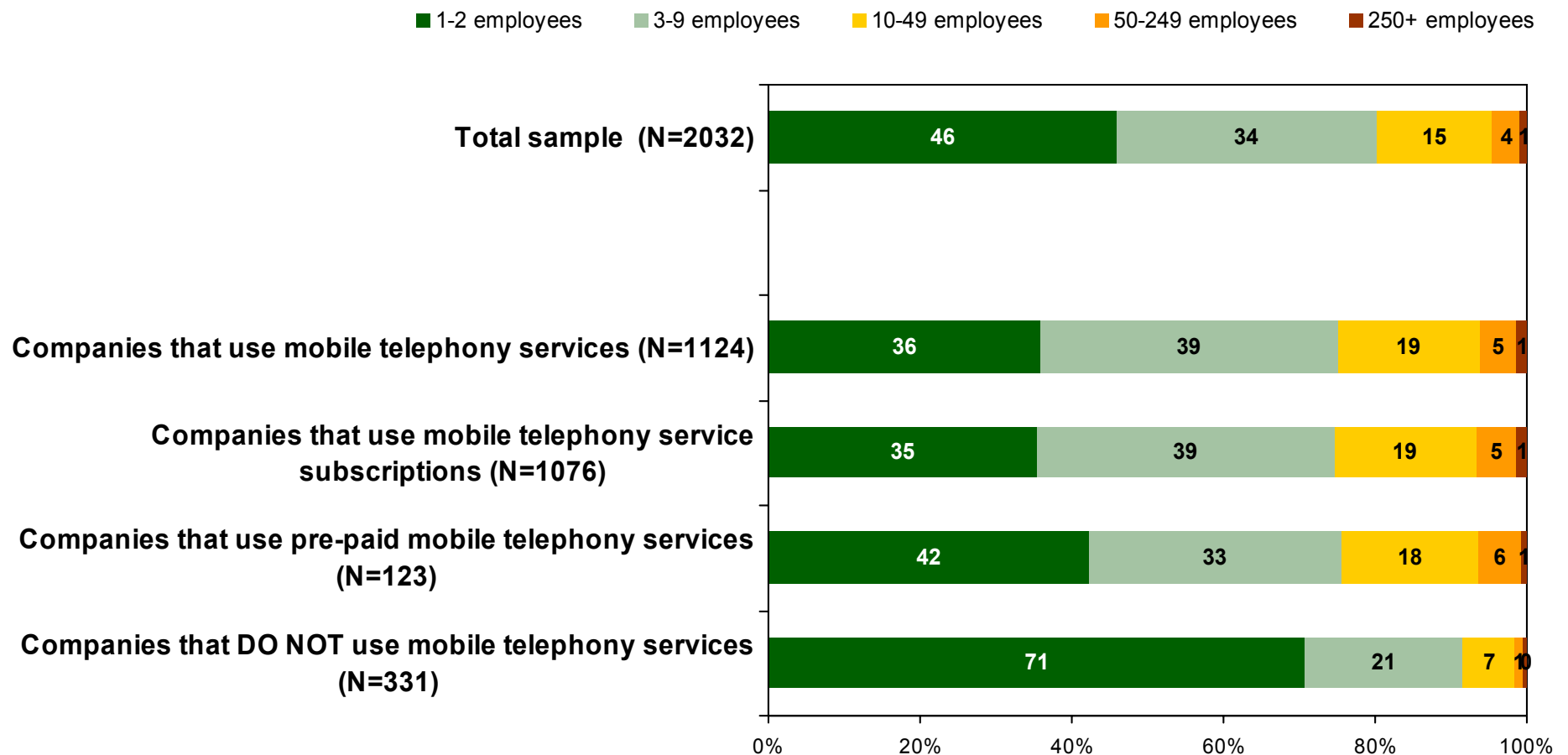
Profile of Companies and Institutions that Use Mobile Telephony Services

- Companies which do not use mobile telephony services are mostly small companies (1-2 employees) and revenue under 50 000 EURO per annum. As compared to structure of total sample, the profile of companies are more from North-East and West areas.
- Moreover, when compared with structure of total sample, the companies which use pre-paid mobile telephony are mostly in North-West, North-East, South-East and South, but less in Central and Bucharest areas. Generally speaking they are less financially solid companies, with revenues under 50 000 EURO per annum.
- Companies which use subscription mobile telephony services do not have a particular profile.

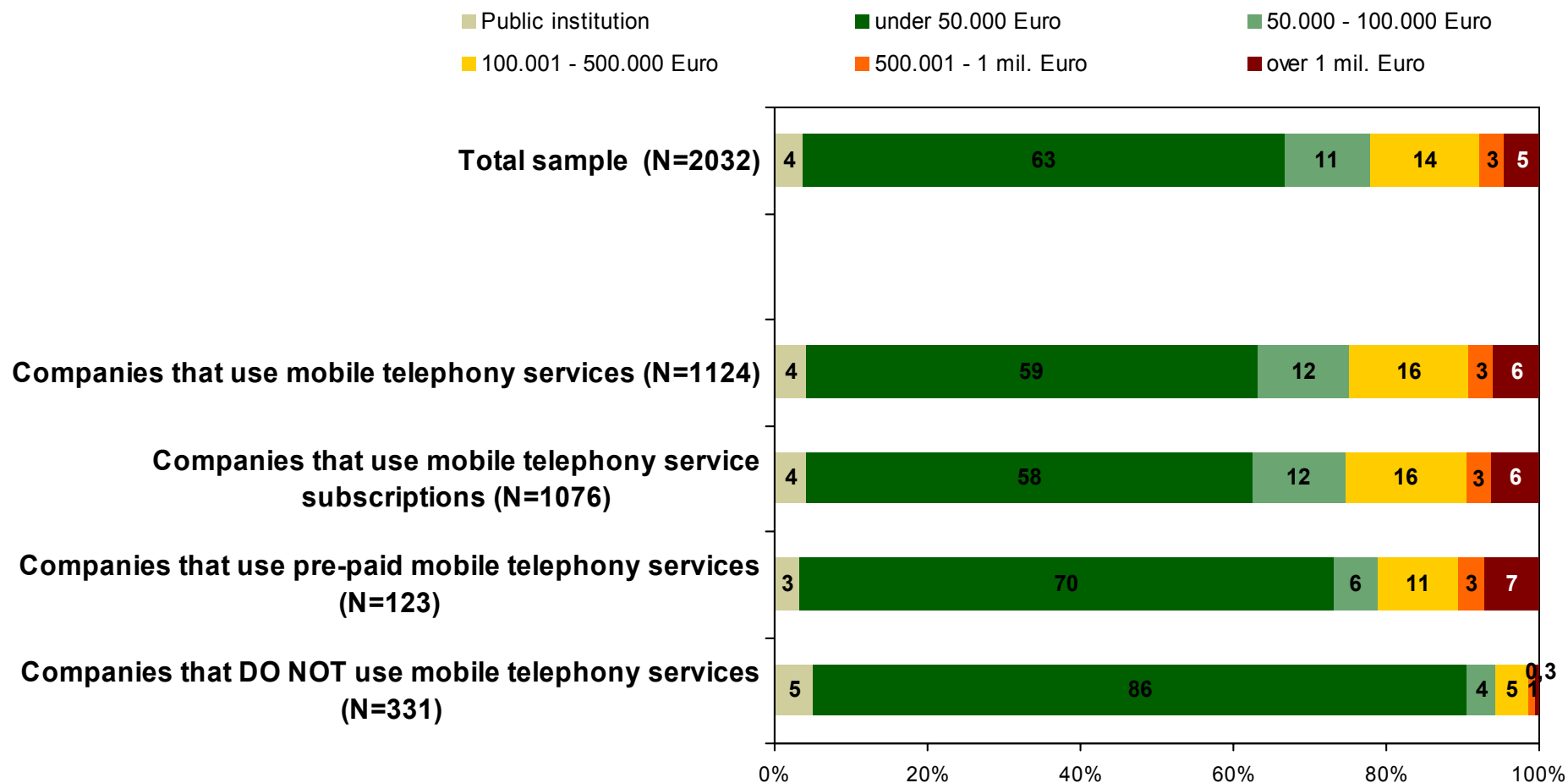
■ NORTH-EAST ■ SOUTH-EAST ■ SOUTH ■ SOUTH-WEST ■ WEST ■ NORTH-WEST ■ CENTRE ■ BUCHAREST



Size of Company and Institution (Number of Employees)



2005 Revenue



Type of Activity

Public institution Agriculture, forestry Industry Constructions Trade Services Not specified

