

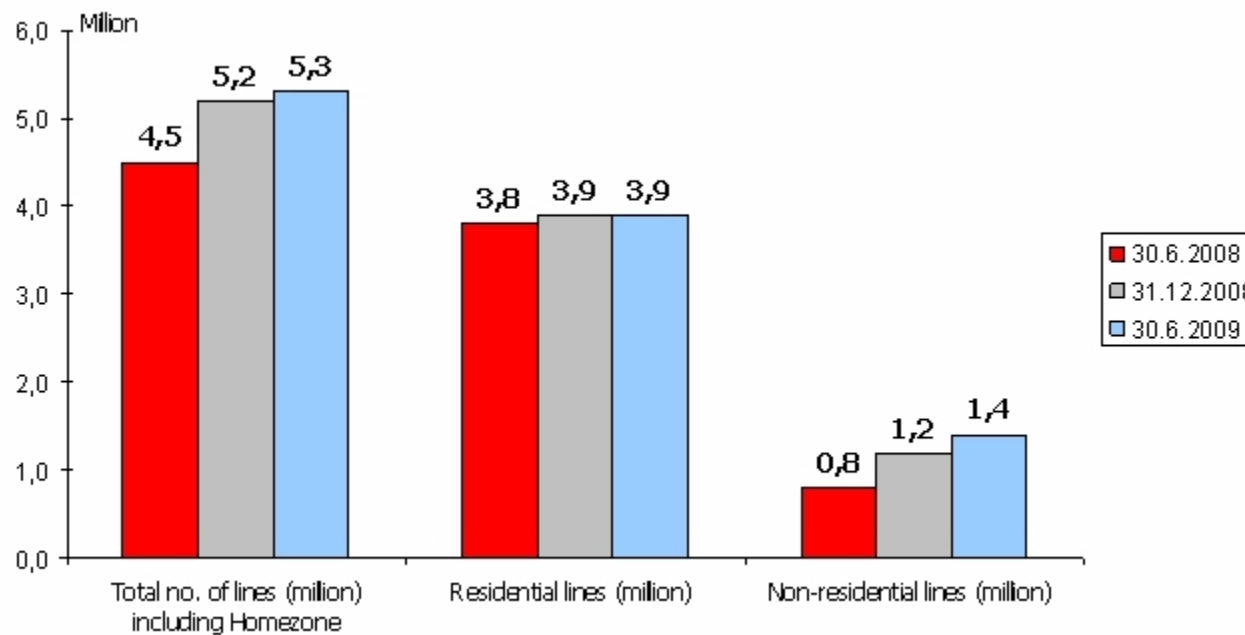
Romanian Electronic Communications Market in the context of the Economic Downturn

Cătălin MARINESCU
President

Global Forum 2009
Bucharest, October 19, 2009

www.ancom.org.ro

Fixed Telephony Penetration Up, Voice Traffic Down



Penetration rate UP

per 100 inhabitants – **24.7%** (+3.6% compared to 30.06.2008)

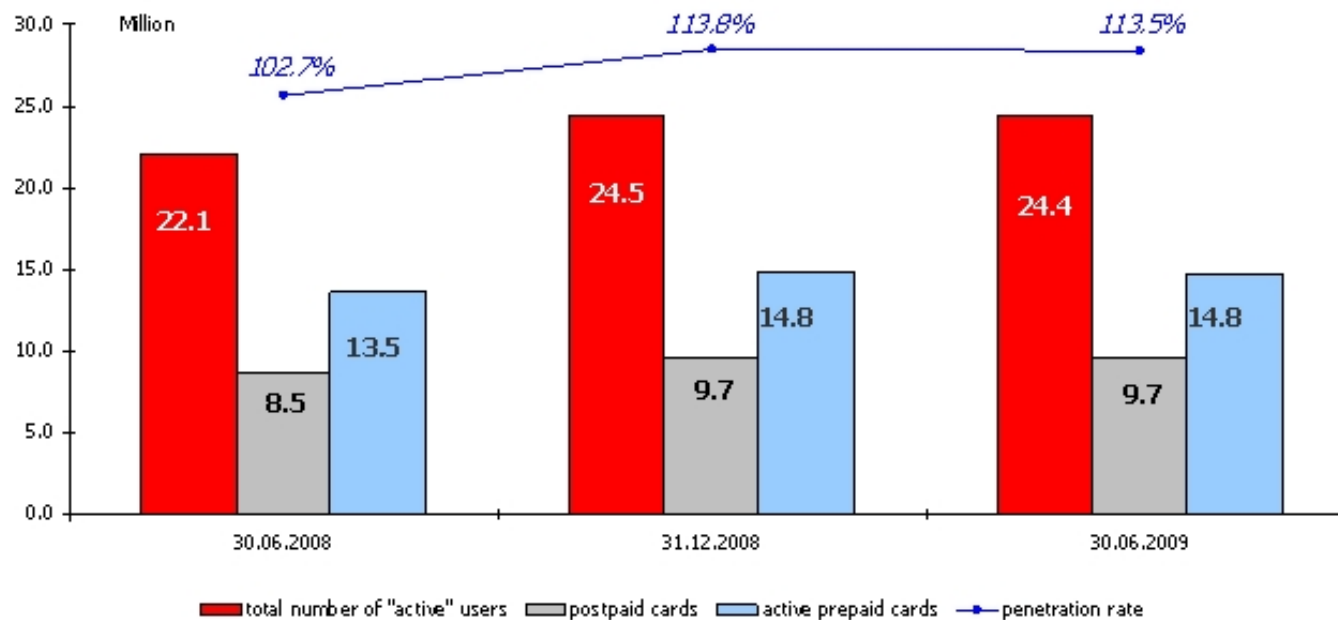
per 100 households – **54.6%** (+3.1% compared to 30.06.2008)

Voice traffic DOWN

by 16% (compared to the same period of 2008)

Mobile Telephony

Number of Users Steady, Voice Traffic Significantly Up



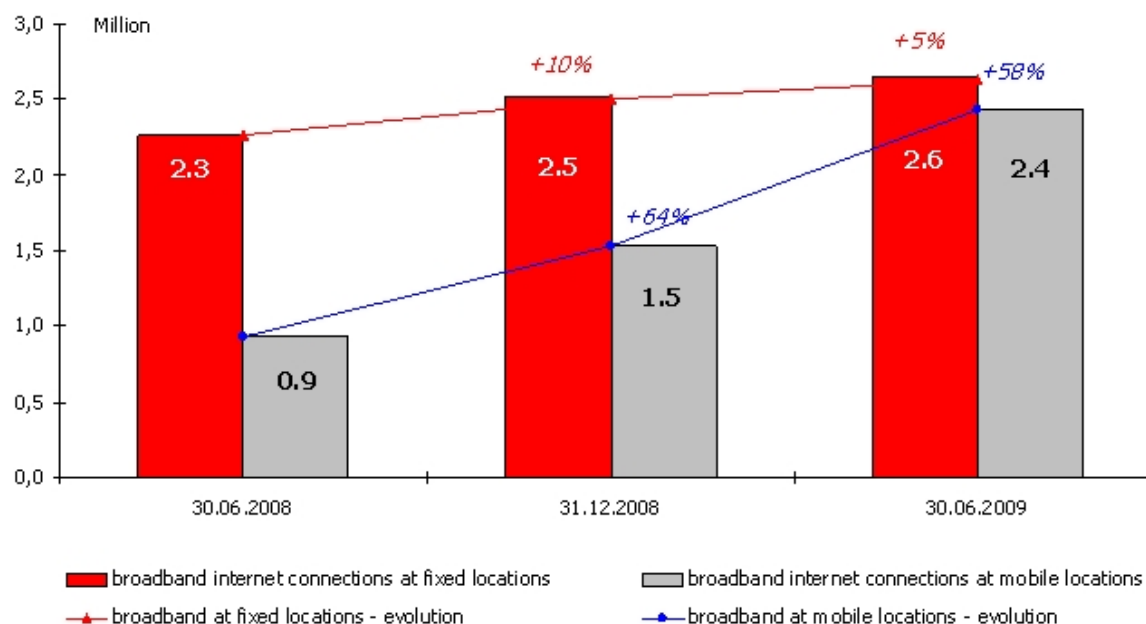
Penetration - STAGNATION

The total number of users remained about the same after the first 6 months of 2009.

Voice traffic UP

19.5 billion minutes (+34% compared to the same period of 2008)

Broadband Internet Access Penetration Increases



Broadband internet connections at fixed locations:

12.3% (+1.8% compared to Mid-2008) penetration rate per 100 inhabitants

32.1% (+5.1% compared to Mid-2008) penetration rate per 100 households

Broadband internet ACTIVE connections at mobile locations (by EDGE, CDMA, 3G, EV-DO):

11.3% (+7.0% compared to Mid-2008) penetration rate per 100 inhabitants

Includes connections via mobile handsets, modems/cards/keys

Key Determinants

- Higher Competition
 - Adaptable and dynamic business plans
 - Innovation
 - Flexible, attractive offers
 - Lower, affordable prices
and last, but not least
 - Lower Termination Rates, which enable attractive off-net offers
 - Portability
- ⇒ Same client base, higher consumption, lower prices



Thank you for your attention.

catalin.marinescu@ancom.org.ro

www.ancom.org.ro