

Mobile Markets Questionnaire

Information gathering for identification of relevant markets, SMP designation and imposition of proportionate remedies

The ANRCTI's Market Reviews under the EU Regulatory Framework
Public Workshop in Bucharest, 16 January 2008



This project is funded by the European Union



A project implemented by the consortium of WIK-Consult GmbH and Gibson, Dunn & Crutcher LLP



General issues

- Market analysis should be based on reliable and consistent information, including historical information
- All parties/operators involved should face the opportunity to express their views
- Market analysis starts with the collection of market data to be provided by the market operators
- All operators should have an incentive to supply these data
- Consumer surveys complete the market observation by identifying consumer demand and behavior

Mobile markets susceptible for ex-ante regulation in Romania

- Wholesale voice call termination on individual mobile networks
 - Market 7 of the Revised Recommendation of the EC
- Wholesale access and call origination on public mobile networks
 - No longer included in the Revised Recommendation of the EC
 - Market 15 of the “old” Recommendation of the EC
 - Susceptible to ex ante regulation based on particular national circumstances?

Mobile markets questionnaires

Questionnaire no. 1

- Relevant for fixed operators which concluded or intend to conclude interconnection agreements for call termination at mobile locations

Questionnaire no. 2

- Only relevant for Mobile Network Operators (supplying mobile services at the retail or wholesale level or acquiring termination services at mobile locations in other public networks)

Provision of the questionnaire by ANRCTI

- On the website of ANRCTI (www.anrcti.ro)
- Send official letters to the MNOs and fixed operators as well

Deadline for submitting answers – 8 February 2008

Mobile markets questionnaire - Supply side

Quantitative Data

- Time period covered: 2004 to 2007
- Mobile retail services (market shares of MNO)
 - Number of customers (GSM, CDMA, UMTS)
 - Number of actual/invoiced call minutes originated by customers
 - Number of SMS/MMS originated by customers
 - (Retail) revenues
 - (Retail) prices since 1. January 2004

Mobile markets questionnaire - Supply side

Quantitative Data

- Network Infrastructure (coverage, network elements, capacity)
 - With regard to GSM, CDMA, UMTS
- Wholesale services
 - Number of call minutes (voice calls) terminated
 - Revenues from actual voice calls terminated
 - Number of SMS terminated
 - Revenues from SMS terminated
- Churn, ARPU and largest business customers

Mobile markets questionnaire – Supply side

Qualitative Questions

- Switching costs (loyalty programs, minimum contract periods) and switching behavior
- Competitive advantages with regard to distribution and sales network, access to capital markets, spectrum assigned
- Product and tariff innovations
- Countervailing market power
- Pent up demand for wholesale access and call origination
- Etc.

Mobile markets questionnaire – Demand side

Qualitative Questions

- Interconnection for mobile call termination
- Associated services
- Costs of interconnection services
- Factors that influence the negotiation of interconnection agreements
- Alternatives to the chosen kind of interconnection (substitution analysis)



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