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1. EXECUTIVE SUMMARY

General Issues

Main objective of the present research is to explore the Internet consumer user market. The analysis was done on Internet users (home users or outside the household users), who were defined as persons in the urban area, between 15 to 50 years old and having an Internet usage frequency of at least once a week******. The analysis focused on the following objectives: the Internet market size and structure, the type of connections and Internet providers used, interest in other type of Internet services, evaluating the main dial-up and dedicated services providers and establishing a demographic profile of the Internet user.

Market Size and Structure

18.0% of the persons in the urban area, aged between 15-50 years ,use the Internet at least once a week. Of those, 7.5% of the persons in the urban area, aged between 15-50 years use the Internet at home.

81.4% of the households with Internet access use dial-up connections (74.3% use *fixed phone lines*) and 20.7% of them use dedicated connections, mainly through *TV Cable* (16.1%). The majority of Internet dial-up users (71.%) spend USD15 or less each month with the Internet connection and telephony service, while 66.1% of dedicated users spend between USD5 and USD25 with their Internet connection. As for number of accounts (or ports), the large majority of both dial-up and dedicated connections users have only one.

Internet Usage Habits

Generally, the persons who don't have Internet access at home use the Internet at an Internet Café or at school/ work. Most of those who use the Internet at home may also use it at school/ work.

The Internet is used mainly for *personal reasons*, both by home Internet users and by those who use the Internet outside the household. As for main activities performed on the Internet, most persons use it for *e-mail* (88.7%) and for *entertainment* (74.4%).

Dial-up Internet Market

The *fixed phone line* is the most used dial-up connection (91.3% of the households using dial-up connections use a fixed phone line). The main dial-up Internet provider is Xnet (71.0%), followed at a great distance by Easy Net (8.8%) and RDS (5.7%).

63.3% of dial-up Internet users spend USD10 or less each month with the telephony bill for the Internet access. For 46.6% of dial-up users, the monthly weight of Internet related expenses in the telephone bill is between 20% and 40%.

The interest in ISDN connections is rather low, only in 19.1% of the households with dial-up connections an ISDN connection *would (definitely or probably) be bought*. As for dedicated connections the interest is higher, in 37.0% of the households with dial-up connections a dedicated connection *would (definitely or probably) be acquired* in the next 12 months.

The *calls price* and *the price of the subscription* are the two most important attributes of a dial-up Internet services providers. They are considered ***entry tickets***. Other important attributes for a dial-up provider are the ***key drivers***: *enduring quality of services, network availability (not to be busy), data transfer rate* and *technical support quality*. Regarding the ***value added*** attributes, which can provide the possibility of differentiation from competitors, in the case of dial-up providers they are: *provider's reputation* and *connection/ logon time*.

Dedicated Internet Market

Most used dedicated connection is through *TV cable* (77.6%). The dedicated connection through *optical fiber* is used by 14.2% of dedicated connections users. The two main used Internet dedicated providers are *RDS* (52.4%) and *Astral Telecom* (26.4%).

There is a small interest in bandwidth upgrading: in the majority of cases (66.6%), the bandwidth *would (definitely or probably) not be upgraded.* As for dedicated connection upgrading, in 75.9% of the households currently using one, *another dedicated connection would (definitely or probably) not be acquired* in the next 12 months.

Regarding the dedicated Internet services providers, in the ***entry tickets*** category we can find beside the price related attributes we could find in the dial-up providers section, the *date transfer rate*. The ***key drivers*** in this case are *the quality of the customer service* and *data confidentiality*. For dedicated providers there is a great opportunity for differentiation because of the great number of attributes in the ***value added*** category: *the diversity of the connection technologies offered*, *provider's reputation/ experienced provider*, *uptime (network availability)*, *technical support quality*, *solving promptly the network problems*, *professional installation and configuration* and *average delay time within the network – access time to the interested sites.*

Switching Patterns

Only in 11.0% of the households currently using an Internet connection another type of Internet connection was used in the past. This is most likely the case for those who currently use a dedicated connection rather than for those who use a dial-up connection. Most of home Internet users, who switched to a dedicated connection, previously used a *dial-up fixed phone line* (80.4%).

The large majority of both dial-up users (86.3%) and dedicated users (62.9%) never changed the Internet services provider in the past.

Also, the large majority of home Internet users do not intend to change the current Internet services provider (86.9% of those who use dedicated connections as compared to a significantly smaller percentage of those who use dial-up connection – 60.7%).

CHAPTER 2

2. OBJECTIVES AND METHODOLOGY

2.1. Objectives

Main objective of the present research is to explore the Internet consumer user market. In this respect, we reached the following specific research objectives:

- Number of Internet users and places of accessing the Internet
- Household PC and Internet penetration
- Main Internet connections & providers used
- Modalities of paying for the Internet access
- Monthly expenses with Internet services
- Usage behavior
- Dial-up connections users' interest in ISDN and dedicated connections
- Dedicated connections users' interest in bandwidth and dedicated connections upgrading
- Dial-up and dedicated services providers evaluation
- Internet connections and services awareness
- Demographic profile of the Internet user

2.2. Methodology

Research Method: nation-wide survey

Target Population: persons aged between 15 and 50 years old, from the urban area, Internet users (at home or outside the household) at least once a week in the past 4 weeks.

Data Collection Technique: face to face interviews, respondents selection was based on a screening questionnaire.

Sampling Technique: probability non-proportionate stratified sampling technique, where the main strata are the historical regions and urbanization degree. The strata are presented below:

- Historical regions: Bucharest, Muntenia, Ardeal, Banat and Moldavia
- Urbanization degree: Bucharest, large cities (more than 200,000 inhabitants), medium cities (50,000-200,000 inhabitants) and small cities (less than 50,000 inhabitants)

Sample Size & Structure: 1068 persons were interviewed, out of which:

- 552 persons use the Internet only outside the household (they do not have home Internet access)
- 516 persons use the Internet at home.

Data weighting: data were weighted in order to get the real structure of target population. The universe of Internet Users consists of 2,060,464 persons (the spanning index is 1929.27).

Data Collection Period: February 8 – 18, 2004

2.3. Field Report

FIELD REPORT (HOUSEHOLDS)	
➢ Visited Addresses	17,421
➢ No answer	7,903
➢ Contacts	9,518
➢ Refusals (Screening Questionnaire)	3,475
➢ **Not Eligible**	4,849
➢ Not Eligible (S1 - There is nobody in the household who uses a PC)	4,433
➢ Not Eligible (S3 - There is nobody in the household aged between 15 - 50 who uses the Internet)	258
➢ No Person aged between 15-50 who uses Internet was at home	107
➢ Not Eligible (F2 - Experience filter)	30
➢ Not Eligible (S4 – Person who did not used Internet at least once a week in the past 4 weeks)	21
➢ **Eligible** (Person aged between 15-50 who uses Internet at least once a week)	1,194
➢ Refusals (Main Questionnaire)	61
➢ Exceeded quota	43
➢ Main Questionnaires	1,090

Indexes	
Refusal rate (Screening Questionnaire)	37%
Refusal rate (Main Questionnaire)	5%
Incidence	0.20

CHECK REPORT (HOUSEHOLDS)	
➢ Main Questionnaires	1,090
➢ Main Questionnaires - invalid	22
➢ Questionnaires were not completed on the field	3
➢ Respondent used Internet less often than once a week	6
➢ Respondent was not aged between 15 - 50	4
➢ Respondent doesn't use Internet at home	4
➢ Incomplete questionnaires	5
➢ Main Questionnaires - valid	1,068

In order to assure data accuracy, approximately 36% of questionnaires were checked by telephone and 12% on the route.

CHAPTER 3

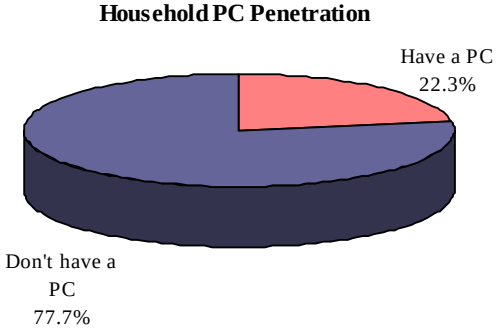
3. INTERNET MARKET SIZE & STRUCTURE

3.1. Market Size

3.1.1. Household PC Penetration

S1. Which of the following activities do you or the members of your household do?

Household PC Penetration	**Households**
	%
Have a PC	22.3
Don't have a PC	77.7
Total	**100.0**



In 891,513 households, which represent 22.3% of the households in the urban area, there is a PC.

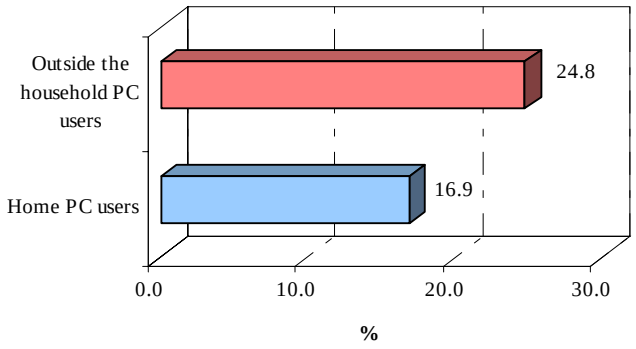
3.1.2. PC Usage

S1. Which of the following activities do you or the members of your household do?

PC Usage	**Persons**
	%
PC Users*	27.2
Outside the household PC users	*24.8*
Home PC users	*16.9*
PC Non – users	72.8
Total	**100.0**

** Multiple answer*

PC Usage (Incidence)



3,116,476 persons in the urban area (27.2% of the total urban population) use the PC.

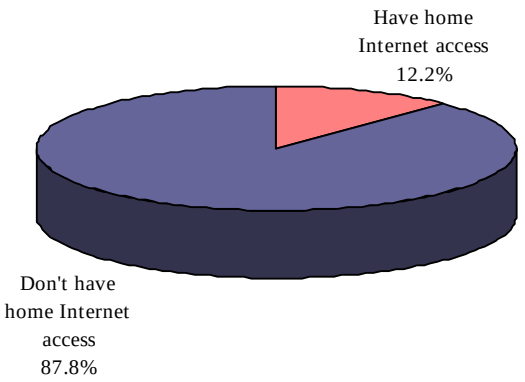
2,839,470 persons (24.8% of the urban population) use the PC at home, while 16.9% use it outside the household.

3.1.3. Household Internet Penetration

S1. Which of the following activities do you or the members of your household do?

Household Internet Penetration	**Households**
	%
Have home Internet access	12.2
Don't have home Internet access	87.8
Total	**100.0**

Household Internet Penetration



488,070 households in the urban area (12.2% of the total households in the urban area) have home Internet access.

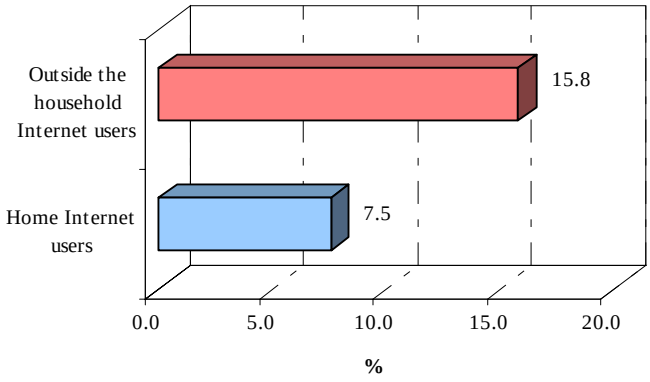
3.1.4. Internet Usage

S1. Which of the following activities do you or the members of your household do?
S2. How many of your household members, including yourself, perform these activities?
S3. How many of these members are between 15 and 50 years old?
S4. How often have you used the Internet in the past 4 weeks?

Internet Usage	**Persons**
	%
Internet Users*	18.0
Outside the household Internet users	*15.8*
HOME INTERNET USERS	*7.5*
Internet Non - users	82.0
Total	**100.0**

** Internet Users = persons aged 15 – 50 who use Internet at least once a week*

Internet Usage (Incidence)



2,060,464 of the persons in the urban area (18.0% of the 15-50 years population) use the Internet.

863,421 persons (7.5% of the persons in the urban area, aged between 15-50 years) use the Internet at home.

3.2. Market Structure[1]

3.2.1. Market Structure by Type of Connection

Q17. You've said you use the Internet at home. What type of Internet connection do you use?

Market Structure by Type of Connection	Households	
	Universe = 476,312	%*
DIAL - UP CONNECTIONS	**387,669**	**81.4**
Fixed phone line	353,832	74.3
GSM/ CDMA/ GPRS	40,935	8.6
ISDN	1,564	0.3
DEDICATED CONNECTIONS	**98,743**	**20.7**
TV cable	76,631	16.1
Optical fiber	14,012	2.9
Radio	3,840	0.8
RomTelecom leased line (standard modem)	2,096	0.4
RomTelecom leased line (XDSL: ADSL, SDSL, HDSL etc.)	1,564	0.3
Satellite / V-Sat	600	0.1

** Multiple answer*

81.4% of the households with Internet access use dial-up connections (74.3% use *fixed phone lines*) and 20.7% of them use dedicated connections, mainly through *TV Cable* (16.1%).

[1] *The analysis in this subchapter was done on the households that have Internet access*

3.2.2. Market Structure Based on Value

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile.
Q31. How much do you spend on average, each month with the telephony service you use for connecting to the Internet?

Dial-up Market Structure Based on Value (USD, including VAT)*	Households	
	Universe	%**
Less than 5	79,387	20.5
[5 - 10]	104,465	26.9
(10 - 15]	92,133	23.8
(15 - 25]	68,180	17.6
More than 25	43,504	11.2
Total	**387,669**	**100.0**
Average monthly expenses (USD, including VAT)	-	***12.49***

** Were included both monthly expenses with dial-up Internet access and monthly telephone expenses due to dial-up*
*** Base: Dial-up Home Internet Users*
USD 1 = ROL 33,000

Q50. How much do you spend, on average, each month for every dedicated connection you own? Please express these spending in ROL, including VAT.

Dedicated Market Structure Based on Value (USD, including VAT)	Households		
	Universe	%*	Normalized Percents
Less than 5	7,842	7.9	8.9
[5 - 10]	21,124	21.4	24.2
(10 - 15]	22,091	22.4	25.3
(15 - 25]	14,488	14.7	16.6
(25 - 35]	4,159	4.2	4.7
(35 - 50]	16,762	17.0	19.2
More than 50	1,028	1.0	1.1
DK/ NA	11,248	11.4	-
Total	**98,743**	**100.0**	**100.0**
Average monthly expenses (USD, including VAT)	-	***15.55***	-

** Base: Dedicated Home Internet Users*
USD 1 = ROL 33,000

The majority of Internet users spend between USD5 and USD25 each month, with the Internet connection (68.3% of dial-up Internet users and 66.1 % of dedicated users).

There is a significantly higher percentage of dial-up users (20.5%) who spend each month less than USD5 with their Internet connection, as compared to only 8.9% of those who use dedicated connections.

25.1% of the dedicated connections users spend monthly more than USD25, a significantly higher percentage as compared to dial-up users who spend this amount of money for their Internet connection.

3.2.3. Market Structure Based on Volume

Q26. How many Internet dial-up accounts, whether paid or free, do you use at home?

Dial-up Market Structure Based on Volume (Number of Dial-up Accounts)	Households	
	Universe	%*
One account	322,385	83.2
2 accounts	47,710	12.3
3 or more accounts	17,573	4.5
Total	**387,669**	**100.0**
Average number of dial-up accounts	-	***1.21***

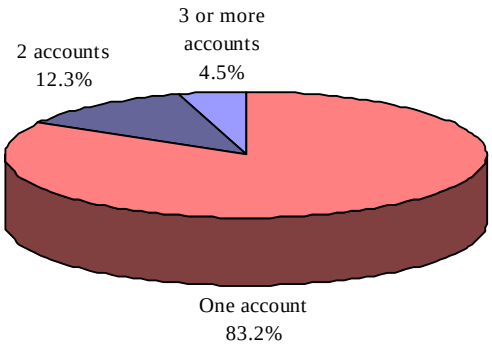
** Base: Dial-up Home Internet Users*

Q48. How many dedicated ports (gateways) do you use?

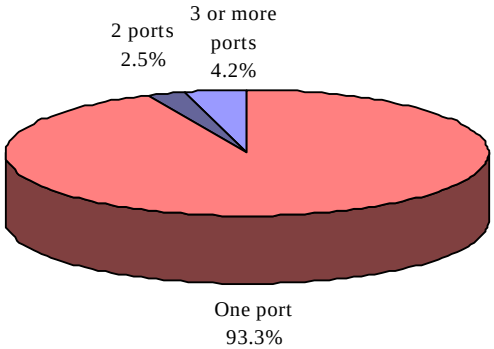
Dedicated Market Structure Based on Volume (Number of Dedicated Ports)	Households	
	Universe	%
One port	92,110	93.3
2 ports	2,439	2.5
3 or more ports	4,194	4.2
Total	**98,743**	**100.0**
Average number of dedicated ports	-	

** Base: Dedicated Home Internet Users*

Dial-up Market Structure Based on Volume (Number of Dial-up Accounts)



Dedicated Market Structure Based on Volume (Number of Dedicated Ports)



The large majority of both dial-up and dedicated connections users have only one Internet account (or port).

3.3. Internet Services Providers Usage

Q19. What Internet providers do you have for each type of connection you use?

Internet Services Providers Usage	Type of Internet Connection Used		Total (universe=476,312)
	Dial-up Connection (universe=387,669)	Dedicated Connection (universe=98,743)	
	%*		
Xnet	71.0	-	57.8
RDS	5.7	52.4	15.3
Astral Telecom	3.0	26.4	7.9
Easy Net	8.8	-	7.2
Zapp	4.9	-	4.0
Artelecom	3.9	-	3.2
PC Net	2.0	1.4	1.9
Idilis	1.7	-	1.4
FX - Internet	0.8	2.1	1.1
Other	3.2	19.1	6.6

** Base: Households that have Internet access*
Multiple answer

Main dial-up Internet services provider used is *Xnet* (71.0%), followed at great distance by *Easy Net* (8.8%) and *RDS* (5.7%).

As for dedicated Internet services, main providers used are *RDS* (52.4%) and *Astral Telecom* (26.4%).

4. INTERNET SERVICES AWARENESS[1]

4.1. Internet Connections Awareness

4.1.1. Internet Connections Unaided Awareness

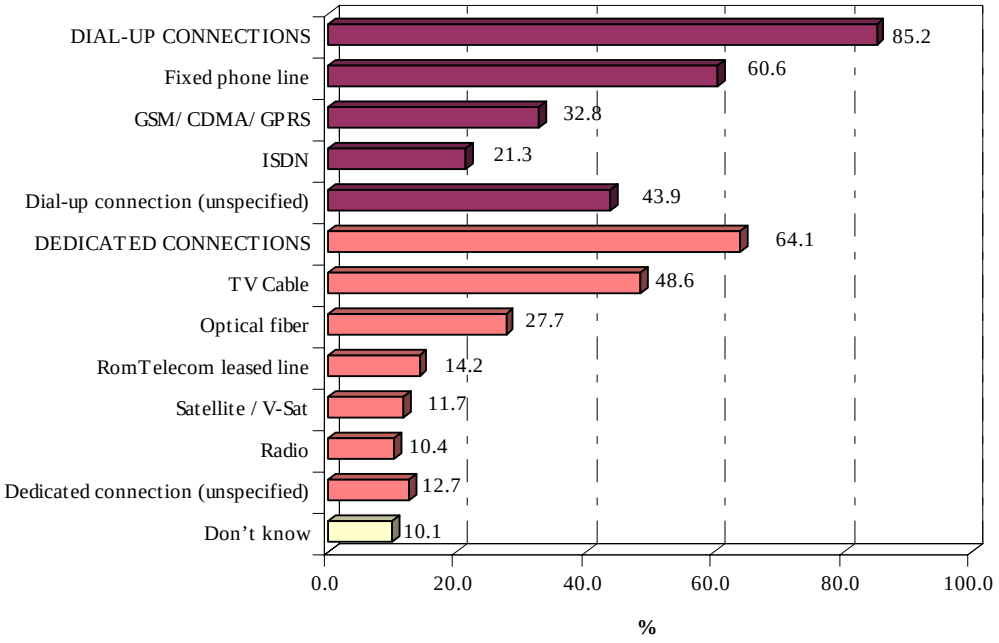
Q1. Which are the type of Internet connections you heard of?

Internet Connections Unaided Awareness	Outside the Household Internet Users[2](1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
DIAL-UP CONNECTIONS	**78.6(2)**	**94.3(1)**	**85.2**
Fixed phone line	56.2(2)	66.6(1)	60.6
GSM/ CDMA/ GPRS	31.4	34.8	32.8
ISDN	18.1(2)	25.8(1)	21.3
Dial-up connection (unspecified)	38.4(2)	51.6(1)	43.9
DEDICATED CONNECTIONS	**58.9(2)**	**70.6(1)**	**64.1**
TV Cable	44.2(2)	54.8(1)	48.6
Optical fiber	21.6(2)	36.1(1)	27.7
RomTelecom leased line (standard modem, XDSL: ADSL, SDSL, HDSL etc.)	12.3(2)	17.0(1)	14.2
Satellite / V-Sat	9.0(2)	15.4(1)	11.7
Radio	6.5(2)	15.7(1)	10.4
Dedicated connection (unspecified)	11.9	13.9	12.7
Don't know	15.0(2)	3.3(1)	10.1

** Multiple answer*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

[1] *Unweighted base*
[2] *Refer to Internet users who don't have Internet at home*

Internet Connections Unaided Awareness



Overall, home Internet users are significantly more aware of the types of Internet connections as compared to those who use the Internet outside the household.

The large majority of Internet users mentioned at least one of the *dial-up connections* spontaneously (85.2%). The *dedicated connections* were also mentioned by 64.1% of Internet users.

Internet connections through *fixed phone line* and through *TV cable* are the most known types of Internet connections among Internet users (60.6% and 48.6%).

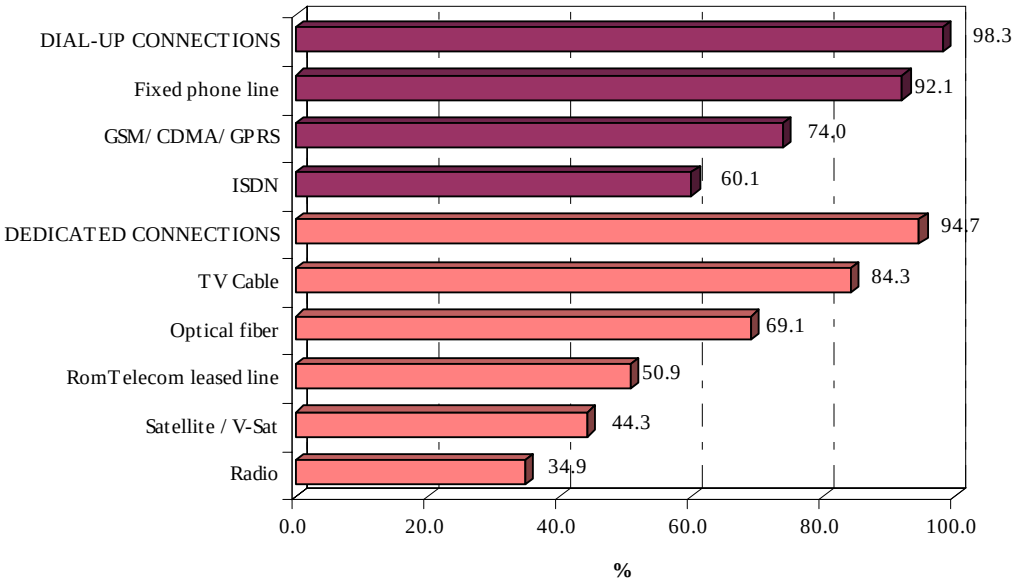
4.1.2. Internet Connections Aided Awareness

Q2. Please look at this card. Which of the following type of Internet connections have you heard of?

Internet Connections Aided Awareness	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
DIAL-UP CONNECTIONS	**97.7**	**99.0**	**98.3**
Fixed phone line	88.1(2)	97.6(1)	92.1
GSM/ CDMA/ GPRS	72.0	76.8	74.0
ISDN	53.2(2)	69.6(1)	60.1
DEDICATED CONNECTIONS	**92.2(2)**	**98.2(1)**	**94.7**
TV Cable	79.3(2)	91.2(1)	84.3
Optical fiber	61.8(2)	79.2(1)	69.1
RomTelecom leased line (standard modem, XDSL: ADSL, SDSL, HDSL etc.)	47.7(2)	55.4(1)	50.9
Satellite / V-Sat	40.4(2)	49.6(1)	44.3
Radio	29.3(2)	42.6(1)	34.9

** Multiple answer*
** Statistical significant differences between percents (1, 2) (level of confidence 95%)*

Internet Connections Aided Awareness



Most types of Internet connections have great aided awareness among the majority of Internet users (both home users or outside the household users). Also, home Internet users are significantly more aware of all types of Internet connections as compared to Internet users outside the household.

Regarding the aided awareness, most known types of Internet connections among home Internet users are *fixed phone line* (97.6%) and *TV Cable* (91.2%). Also, home Internet users are aware of Internet connections through *optical fiber* (79.2%) and *GSM/ CDMA/ GPRS* (76.8%).

4.2. Internet Services Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

Internet Services Price Awareness	Outside the Household Internet Users(1)	Home Internet Users(2)	Total
	Average Price (ROL)		
One minute of Internet through dial-up on RomTelecom during the day*	901(2)	801(1)	857
One minute of Internet through dial-up on RomTelecom in the evening and during the night*	413(2)	309(1)	367
One minute of Internet through dial-up on mobile telephony during the day*	1,179	1,092	1,141
Unlimited access subscription through dial-up connection*	492,151	482,795	488,155
Unlimited access subscription through TV cable, bandwidth 64 kbps**	1,165,743	1,163,711	1,164,807
Unlimited access subscription through optical fiber, bandwidth 128 kbps***	6,513,078	6,559,788	6,536,979

** Base: Persons who are aware of dial-up Internet connections*
*** Base: Persons who are aware of the TV cable Internet connection*
**** Base: Persons who are aware of the optical fiber Internet connection*
USD 1 = ROL 33,000
Statistical significant differences between means (1, 2) (level of confidence 95%)

4.2.1. One Minute of Internet Through Dial-up on RomTelecom During the Day – Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

One Minute of Internet Through Dial-up on RomTelecom During the Day – Price Awareness (ROL)	Outside the Household Internet Users(1) (base=539)	Home Internet Users(2) (base=511)	Total (base=1,050)
	%*		
Less than 100	2.3	1.8	2.1
100 - 300	15.7	14.7	15.3
301 - 500	14.4(2)	21.8(1)	17.5
501 - 800	14.4(2)	21.4(1)	17.4
801 - 1,000	13.1	11.0	12.2
1,001 - 1,500	6.9	7.8	7.3
1,501 - 2,000	5.4	6.2	5.7
Over 2,000	13.9(2)	9.0(1)	11.8
DK/ NA	13.8(2)	6.5(1)	10.7
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***901(2)***	***801(1)***	***857***

** Base: Persons who are aware of dial - up Internet connections*
Statistical significant differences between percents/ means (1, 2) (level of confidence 95%)

The average price considered for one minute of Internet through dial-up connections during the day is round 850 ROL.

Only 21.8% of home Internet users and 14.4% of those who use the Internet outside the household, place the price of one minute on Internet through dial-up connection during the day, in the right interval, 300 – 500 ROL.

4.2.2. One Minute of Internet Through Dial-Up on RomTelecom in the Evening and During the Night - Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

One Minute of Internet Through Dial-Up on RomTelecom in the Evening and During the Night - Price Awareness (ROL)	Outside the Household Internet Users(1) (base=539)	Home Internet Users(2) (base=511)	Total (base=1,050)
	%*		
Less than 100	25.1	27.2	26.0
100 - 300	23.6(2)	35.9(1)	28.8
301 - 500	14.1	15.2	14.5
501 - 800	11.8(2)	6.8(1)	9.7
801 - 1,000	4.0	4.6	4.2
1,001 - 1,500	4.8(2)	2.0(1)	3.7
1,501 - 2,000	1.5	0.6	1.2
Over 2,000	1.5	0.4	1.0
DK/ NA	13.6(2)	7.4(1)	11.0
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***413(2)***	***309(1)***	***367***

** Base: Persons who are aware of dial - up Internet connections*
Statistical significant differences between percents/ means (1, 2) (level of confidence 95%)

In the case of Internet through dial-up during the evening and during the night, the average price perceived is approximately 360 ROL.

4.2.3. One Minute of Internet Through Dial-up on Mobile Telephony During the Day - Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

One Minute of Internet Through Dial-up on Mobile Telephony During the Day - Price Awareness (ROL)	Outside the Household Internet Users (base=539)	Home Internet Users (base=511)	Total (base=1,050)
	%*		
Less than 100	1.7	1.8	1.7
100 - 300	4.2	6.6	5.2
301 - 500	10.1	9.6	9.9
501 - 800	14.1	18.3	15.9
801 - 1,000	9.2	7.3	8.4
1,001 - 1,500	7.2	8.8	7.9
1,501 - 2,000	8.6	9.0	8.8
Over 2,000	19.9	16.4	18.4
DK/ NA	25.1	22.2	23.9
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***1,179***	***1,092***	***1,141***

** Base: Persons who are aware of dial - up Internet connections*

The medium estimation for one minute of Internet through dial-up on mobile telephony during the day is 1,100 ROL.

4.2.4. Unlimited Access Subscription Through Dial-up Connection - Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

Unlimited Access Subscription Through Dial-up Connection - Price Awareness (ROL)	**Outside the Household Internet Users(1) (base=539)**	**Home Internet Users(2) (base=511)**	**Total (base=1,050)**
	%*		
Less than 200,000	2.3(2)	4.8(1)	3.4
200,000 - 300,000	11.9	9.1	10.7
300,001 - 400,000	15.5	19.0	17.0
400,001 - 500,000	12.1	12.5	12.3
500,001 - 600,000	11.7	8.9	10.5
Over 600,000	25.2	25.8	25.4
DK/ NA	21.5	19.9	20.8
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***492,151***	***482,795***	***488,155***

** Base: Persons who are aware of dial - up Internet connections*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

The average price of an one month unlimited access subscription, as perceived by Internet users aware of the Internet connections through dial-up is close to 500,000 ROL.

4.2.5. Unlimited Access Subscription Through TV Cable, Bandwidth 64 kbps - Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

Unlimited Access Subscription Through TV Cable, Bandwidth 64 kbps - Price Awareness (ROL)	**Outside the Household Internet Users(1) (base=446)**	**Home Internet Users(2) (base=467)**	**Total (base=913)**
	%*		
Less than 500,000	13.6(2)	9.3(1)	11.7
500,000 - 800,000	18.7	16.2	17.5
800,001 - 1,000,000	9.2(2)	16.9(1)	12.7
1,000,001 - 2,000,000	21.5	27.0	24.0
Over 2,000,000	14.9	10.8	13.1
DK/ NA	22.0	19.8	21.0
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***1,165,743***	***1,163,711***	***1,164,807***

** Base: Persons who are aware of the TV cable Internet connection*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

The average price perceived by those who are aware of TV cable connections, for a one month unlimited access subscription through TV cable, bandwidth 64 kbps is 1,165,000 ROL.

4.2.6. Unlimited Access Subscription Through Optical Fiber, Bandwidth 128 kbps - Price Awareness

Q3. In your opinion in which interval does the price of these services fit?

Unlimited Access Subscription Through Optical Fiber, Bandwidth 128 kbps - Price Awareness (ROL)	**Outside the Household Internet Users(1) (base=346)**	**Home Internet Users(2) (base=403)**	**Total (base=749)**
	%*		
Less than 5,000,000	21.6	24.1	22.8
5,000,001 - 6,000,000	11.3	13.3	12.3
6,000,001 - 8.000,000	14.3	16.5	15.4
8,000,001 - 13,000,000	15.2	17.4	16.3
Over 13,000,000	4.9	5.1	5.0
DK/ NA	32.7(2)	23.5(1)	28.3
Total	**100.0**	**100.0**	**100.0**
Average price (ROL)	***6,513,078***	***6,559,788***	***6,536,979***

** Base: Persons who are aware of the optical fiber Internet connection*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

27.5% of Internet users aware of optical fiber connections cannot appreciate the price of an unlimited access subscription through optical fiber, bandwidth 128 kbps.

The average price, according to those who expressed their opinion is round 6,500,000 ROL.

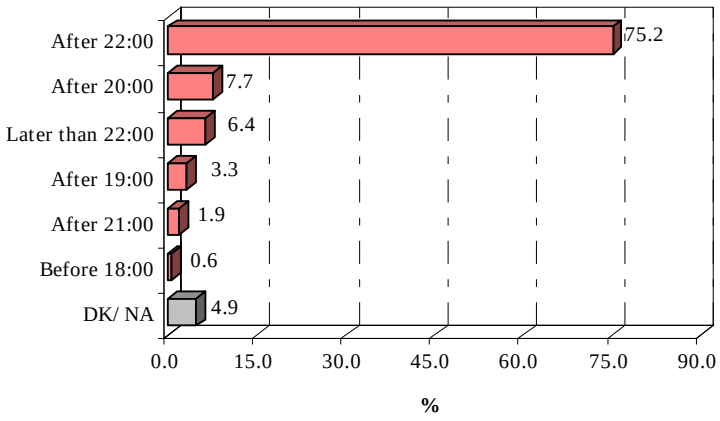
4.3. Awareness of RomTelecom Internet Tariff Change Time

Q4. In your opinion, when becomes lower the Internet tariff on RomTelecom?

Awareness of RomTelecom Internet Tariff Change Time	Outside the Household Internet Users(1) (base=539)	Home Internet Users(2) (base=511)	Total (base=1,050)
	%*		
After 22:00	**68.2(2)**	**84.8(1)**	**75.2**
After 20:00	11.1(2)	3.2(1)	7.7
Later than 22:00	7.3	5.2	6.4
After 19:00	4.1	2.2	3.3
After 21:00	2.3	1.3	1.9
Before 18:00	0.8	0.3	0.6
DK/ NA	6.1(2)	3.1(1)	4.9
Total	**100.0**	**100.0**	**100.0**

** Base: Persons who are aware of dial - up Internet connections*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Awareness of RomTelecom Internet Tariff Change Time



The large majority of home Internet users (84.8%) know the exact time when the RomTelecom Internet tariff changes, 22:00. Also, 68.2% of Internet users outside the household, a significantly smaller percentage as compared to home users, know the exact time when the RomTelecom Internet tariff becomes lower.

5. INTERNET USAGE HABITS[1]

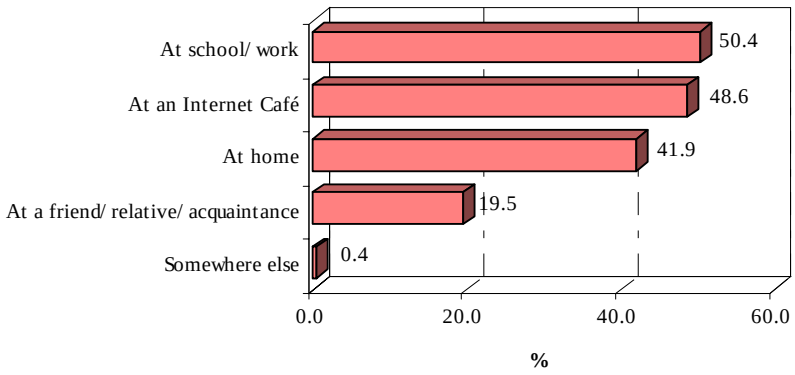
5.1. Places of Accessing the Internet

Q5. Where do you usually use the Internet?

Places of Accessing the Internet	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
At school/ work	53.4(2)	46.2(1)	48.6
At an Internet Café	66.6(2)	23.6(1)	41.9
At home	-	100.0	50.4
At a friend/ relative/ acquaintance	24.3(2)	13.0(1)	19.5
Somewhere else	0.7(2)	0.0(1)	0.4

** Multiple answer*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Places of Accessing the Internet



Most of the persons who use the Internet outside the household, access it from *an Internet Café* (66.6%) or *at school/ work* (53.4%).

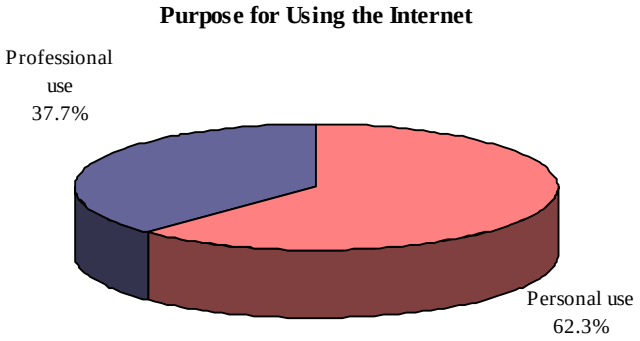
46.2% of those who use the Internet at home may also use it *at school/ work*.

[1] *Unweighted base*

5.2. Purpose for Using the Internet

Q7. Out of 10 hours you spend on the Internet, how many are for personal reasons and how many are for professional reasons?

Purpose for Using the Internet	Outside the Household Internet Users (base=552)	Home Internet Users (base=516)	Total (base=1,068)
	% of time spent on the Internet		
Personal use	62.4	62.2	62.3
Professional use	37.6	37.8	37.7
Total	**100.0**	**100.0**	**100.0**



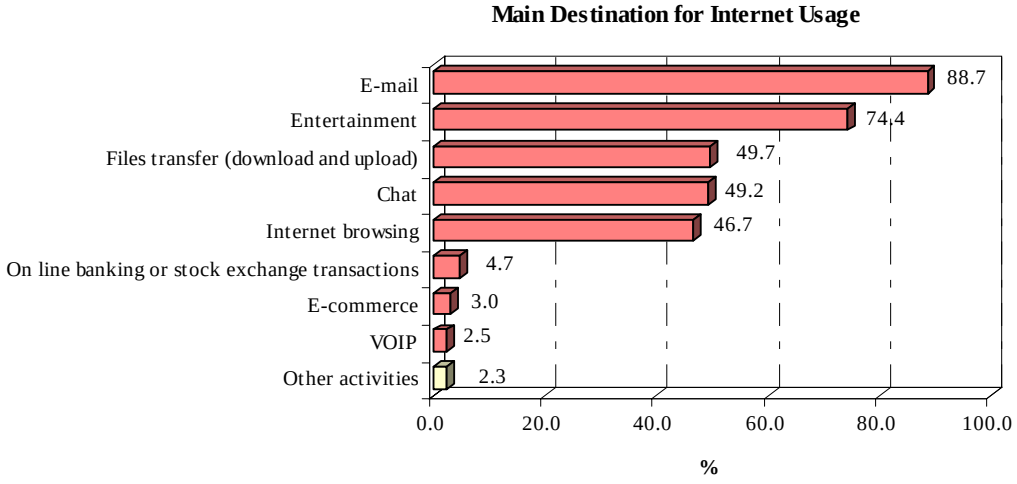
The Internet is used mainly for *personal reasons*, both by home Internet users (62.2%) and by those who use the Internet outside the household (62.4%).

5.3. Main Destination for Internet Usage

Q8. For which of the following activities do you use Internet?

Main Destination for Internet Usage	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
E-mail	85.1(2)	93.5(1)	88.7
Entertainment	72.2	77.4	74.4
Files transfer (download and upload)	35.6(2)	69.3(1)	49.7
Chat	47.9	51.0	49.2
Internet browsing	40.9(2)	54.8(1)	46.7
On line banking or stock exchange transactions	4.2	5.3	4.7
E-commerce	1.5(2)	5.1(1)	3.0
VOIP	2.1	3.1	2.5
Other activities	1.5	3.4	2.3

** Multiple answer*
Statistical significant differences between percents (1, 2) (level of confidence 95%)



Most persons use the Internet for *e-mail* (88.7%) and for *entertainment* (74.4%).

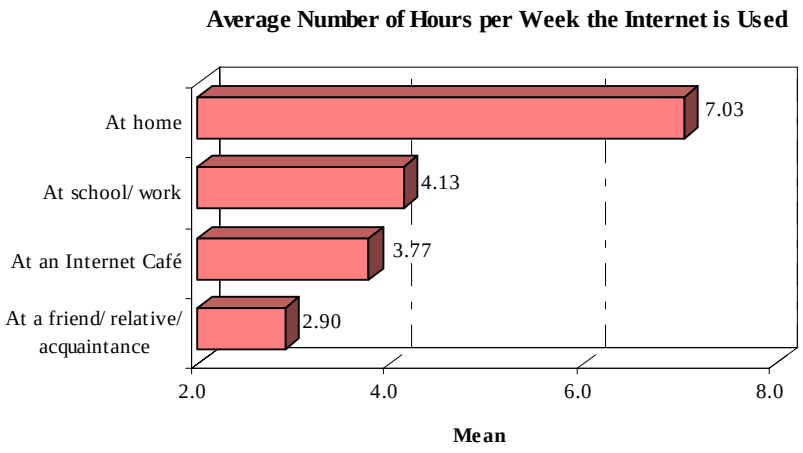
As compared to those who use the Internet outside the household, home Internet users are more likely to use the Internet for *e-mail* (93.5% vs. 85.1%), *files transfer* (69.3% vs. 35.6%) and *Internet browsing* (54.8% vs. 40.9%).

5.4. Average Number of Hours per Week the Internet is Used

Q6. How many hours do your use the Internet from each of these locations during a usual week?

Average Number of Hours per Week the Internet is Used	Outside the Household Internet Users(1)	Home Internet Users(2)	Total
	Mean*		
At home	-	7.03	7.03
With dial – up connection	-	***6.09***	***6.09***
With dedicated connection	-	***12.17***	***12.17***
At school/ work	4.02	4.33	4.13
At an Internet Café	3.97(2)	2.97(1)	3.77
At a friend/ relative/ acquaintance	3.02	2.62	2.90

** Base: Persons who access the Internet from the named location*
Statistical significant differences between means (1, 2) (level of confidence 95%)



The average Internet usage at home is 7.03 hours per week (6.09 hours per week those who use dial-up connections and 12.17 hours per week those who use dedicated connections).

Outside the household users who access the Internet *at school/ work* spend an average of 4.02 hours per week on the Internet, while those who use it *at an Internet Café* spend 3.97 hours per week on the Internet. *At a friend/ relative/ acquaintance* they spend 3.02 hours per week.

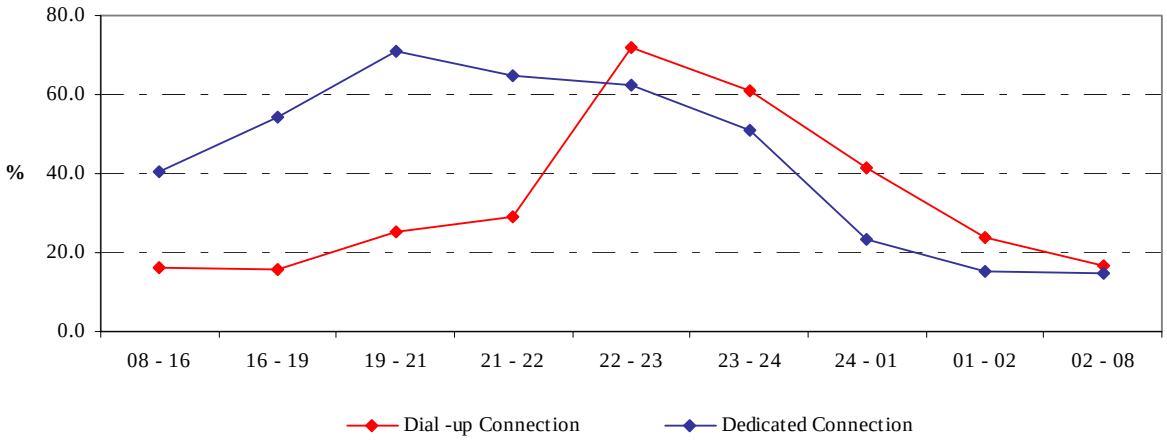
5.5. Internet Usage Seasonality in Terms of Time of the Day

Q33. Which are the hours during the day when you use the Internet through dial-up connection at home?/ Q52. Which are the hours during the day when you use the Internet through dedicated connection at home?

Internet Usage Seasonality in Terms of Time of the Day (Hours)	Dial -up Users(1) (base=409)	Dedicated Users(2) (base=118)
	%*	
08 - 16	16.0(2)	40.7(1)
16 - 19	15.9(2)	54.4(1)
19 - 21	25.3(2)	70.8(1)
21 - 22	28.9(2)	64.8(1)
22 - 23	72.0(2)	62.4(1)
23 - 24	60.9(2)	50.8(1)
24 - 01	41.2(2)	23.3(1)
01 - 02	23.8(2)	15.1(1)
02 - 08	16.9	15.0
DK/ NA	2.8	0.0

** Multiple answer*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Internet Usage Seasonality in Terms of Time of the Day (Hours)



The *dial-up connections* are used mostly after 22:00, until 01:00, while the *dedicated connections* are used constantly during the day (between 08:00 and 24:00) and significantly less after midnight.

In the time interval between 08:00 and 22:00 the dedicated connections are significantly more likely to be used as compared to the dial-up ones. Between 22:00 and 02:00 people use mostly the dial-up connections.

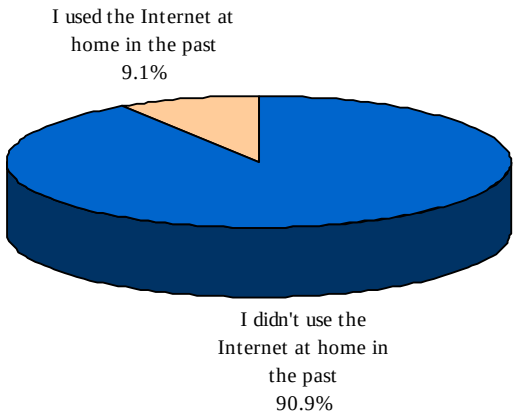
6. OUTSIDE THE HOUSEHOLD INTERNET USERS - PREVIOUS HOME INTERNET USAGE & INTENTION TO BUY[1]

6.1. Previous Use of Internet at Home

Q9. You've said you don't use the Internet at home. Have you use the Internet at home in the past?

Previous Use of Internet at Home	% of persons (base=552)
I didn't use the Internet at home in the past	90.9
I used the Internet at home in the past	9.1
Total	**100.0**

Previous Use of Internet at Home



Only 9.1% of the persons who use the Internet outside the household, have used the Internet at home in the past.

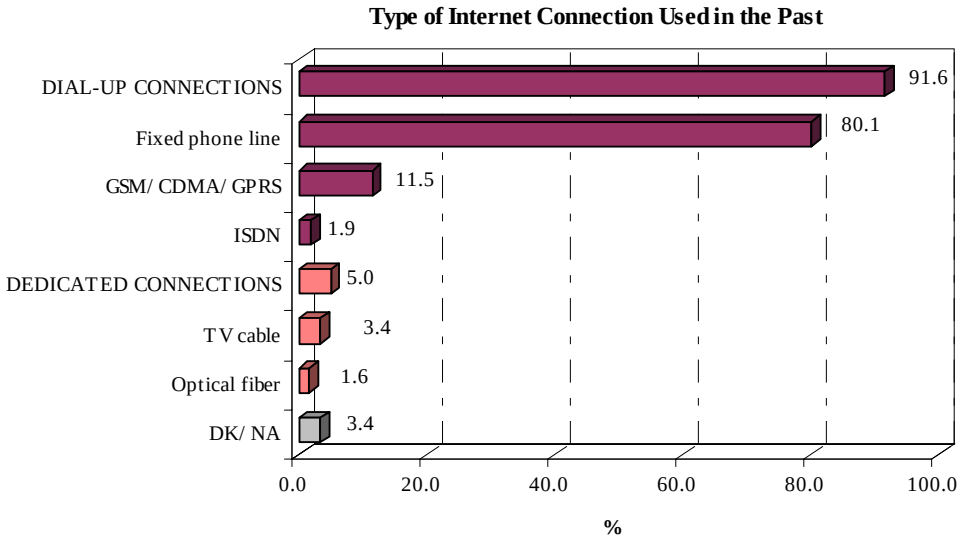
[1] *Unweighted base*
The analysis in this chapter was done on the persons who don't have Internet access in the household.

6.1.1. Type of Internet Connection Used in the Past

Q10. What type of Internet connections did you use?

Type of Internet Connection Used in the Past	%* of persons (base=52)
DIAL-UP CONNECTIONS	**91.6**
Fixed phone line	80.1
GSM/ CDMA/ GPRS	11.5
ISDN	1.9
DEDICATED CONNECTIONS	**5.0**
TV cable	3.4
Optical fiber	1.6
DK/ NA	3.4

** Base: Persons who had Internet at home in the past*
Multiple answer



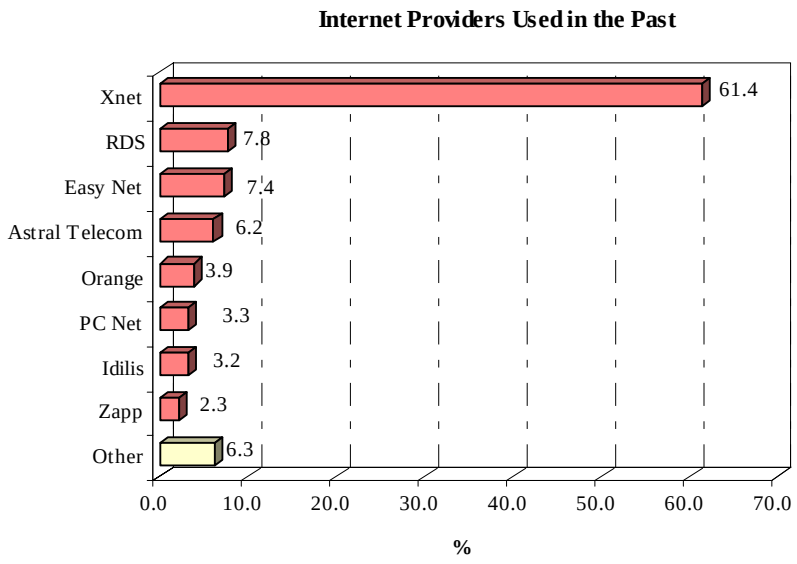
Of those who used the Internet at home, 91.6% used a *dial-up connection* (80.1% used a *fixed phone line*). Only 5.0% of them used a *dedicated connection.*

6.1.2. Internet Providers Used in the Past

Q11. What Internet providers did you have for each type of connection used?

Internet Providers Used in the Past	**%* of persons (base=50)**
Xnet	61.4
RDS	7.8
Easy Net	7.4
Astral Telecom	6.2
Orange	3.9
PC Net	3.3
Idilis	3.2
Zapp	2.3
Other	6.3

** Base: Persons who had Internet access at home in the past*
Multiple answer



Most previously used Internet services provider is by far *Xnet* (61.4%). Other Internet providers previously used are *RDS* (7.8%) and *Easy Net* (7.4%).

6.1.3. Reasons for Giving up Home Internet Usage

Q12. What were the reasons for giving up that connection?

Reasons for Giving up Home Internet Usage	**%* of persons (base=52)**
Unsatisfying transfer rate	39.4
The high cost of telephony services (for dial-up)	31.2
I had the possibility of using the Internet somewhere else	20.7
The connection was interrupted too often	18.8
The line was busy too often when I was calling	15.5
I moved house	14.4
I had problems downloading large attachments/ files	12.3
The high cost of the Internet subscription	5.3
Lack of seriousness of the Internet provider	4.9
Unsatisfying quality of services	2.8
Other	29.8

** Base: Persons who had Internet at home in the past*
Multiple answer

Most important reasons for giving-up the Internet connection previously used are: *the unsatisfying transfer rate* (39.4%) and *the high cost of telephony service (for dial-up)* (31.2%).

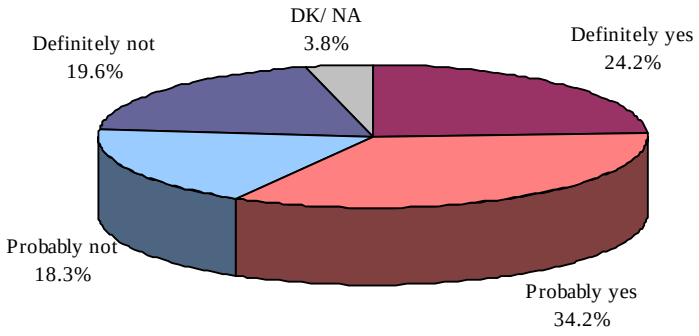
6.2. Intention to Acquire an Internet Connection at Home

Q13. Do you intend to buy an Internet connection for your home in the next 12 months?

Intention to Acquire an Internet Connection at Home	Persons	Households
	% (base=552)	
Definitely yes	24.7	24.2
Probably yes	34.5	34.2
Probably not	18.1	18.3
Definitely not	19.1	19.6
DK/ NA	3.5	3.8
Total	**100.0**	**100.0**
Mean*	***2.67***	***2.65***

** Scale: 1 = definitely not, …, 4 = definitely yes*

Intention to Acquire an Internet Connection at Home



% of households

59.2% of Internet users outside the home *will (definitely or probably) buy* an Internet connection for at home in the next 12 months.

Regarding the households, in 58.4% of them, there is the *intention to buy (definitely or probably)* an Internet connection in the next 12 months.

6.2.1. Type of Internet Connection Intended to Be Acquired

Q14. What type of Internet connection do you intend to use?

Type of Internet Connection Intended to Be Acquired	Persons	Households
	%* (base=319)	
DIAL-UP CONNECTIONS	**59.6**	**60.8**
Fixed phone line	42.4	43.3
GSM/ CDMA/ GPRS	15.4	15.9
ISDN	5.0	5.0
DEDICATED CONNECTIONS	**44.2**	**43.2**
TV cable	33.4	32.3
Optical fiber	6.5	6.7
RomTelecom leased line (standard modem)	3.5	3.5
RomTelecom leased line (XDSL: ADSL, SDSL, HDSL etc.)	1.3	1.2
Radio	0.8	0.8
Satellite / V-Sat	0.7	0.7
DK/ NA	2.5	2.3

** Base: Persons who would (definitely or probably) acquire an Internet connection at home in the next 12 months/ Households in which an Internet connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer

59.6% of Internet users outside the home expressed their desire to acquire a *dial-up connection*, while 44.2% want to acquire a *dedicated connection.*

Most of the persons who use the Internet outside the home intent to acquire in the next 12 months a *fixed phone line* (42.4%) and 33.4% intend to acquire a *TV Cable* connection for at home.

6.2.2. Internet Providers Intended to be Used

Q15. What Internet provider do you intent to have?

Internet Providers Intended to be Used	Persons			Households		
	Dial-up Intenders (base=184)	Dedicated Intenders (base=151)	Total (base=311)	Dial-up Intenders (base=184)	Dedicated Intenders (base=151)	Total (base=311)
	%*					
RomTelecom	33.3	8.2	24.1	32.3	8.2	23.8
Xnet	31.0	1.8	19.8	31.4	2.0	20.4
Astral Telecom	3.0	35.1	17.7	2.9	35.3	17.4
RDS	3.5	28.4	15.0	3.4	27.8	14.4
Zapp	8.7	2.2	6.3	8.7	2.0	6.3
Artelecom	4.1	0.3	2.7	4.0	0.3	2.6
M Bit	0.0	1.9	0.9	0.0	1.8	0.8
Onix	0.0	1.3	0.6	0.0	1.5	0.6
Ugal Ro	0.0	1.3	0.6	0.0	1.2	0.5
Other	13.0	10.8	12.3	13.0	11.5	12.7
DK/ NA	8.3	12.2	10.6	9.2	11.8	10.9

** Base: Persons who would (definitely or probably) acquire an Internet connection at home in the next 12 months/ Households in which an Internet connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer

For the dial-up connections, main Internet providers intended to be used, as mentioned by Internet users, are *RomTelecom* (33.3%) and *Xnet* (31.0%).

As for dedicated connections *Astral* (35.1%) and *RDS* (28.4%) are the main Internet providers used.

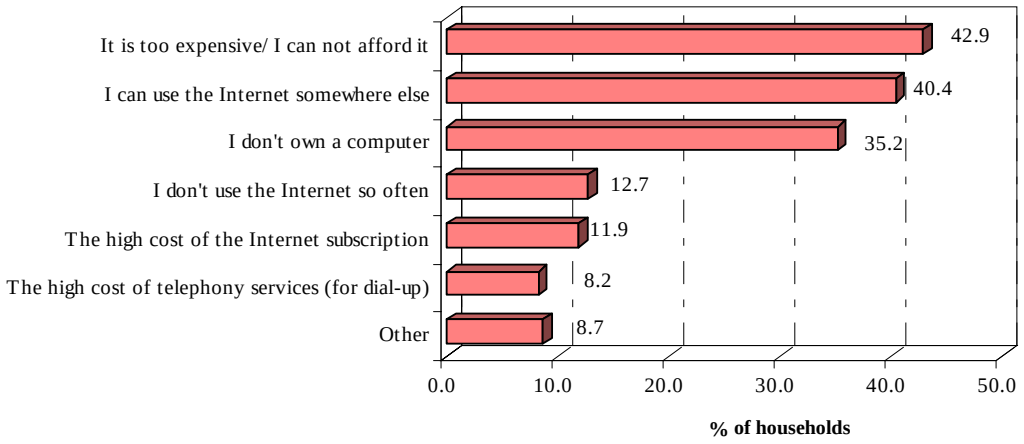
6.2.3. Reasons for Not Intending to Acquire an Internet Connection at Home

Q16. Which would be the reasons for NOT buying an Internet connection in the next 12 months?

Reasons for Not Intending to Acquire an Internet Connection at Home	Persons	Households
	%* (base=213)	
It is too expensive/ I can not afford it	42.0	42.9
I can use the Internet somewhere else	40.6	40.4
I don't own a computer	35.0	35.2
I don't use the Internet so often	12.8	12.7
The high cost of the Internet subscription	12.3	11.9
The high cost of telephony services (for dial-up)	8.3	8.2
Other	9.1	8.7

** Base: Persons who would not (definitely or probably) acquire an Internet connection at home in the next 12 months/ Households in which an Internet connection would not (definitely or probably) be acquired in the next 12 months*
Multiple answer

Reasons for Not Intending to Acquire an Internet Connection at Home



Main reasons for not intending to use the Internet at home in the next 12 months are: *the price* (*it is to expensive/ they can not afford it*) (42.0%), *the possibility of using the Internet somewhere else* (40.6%), and *the lack of a computer in the household* (35.0%).

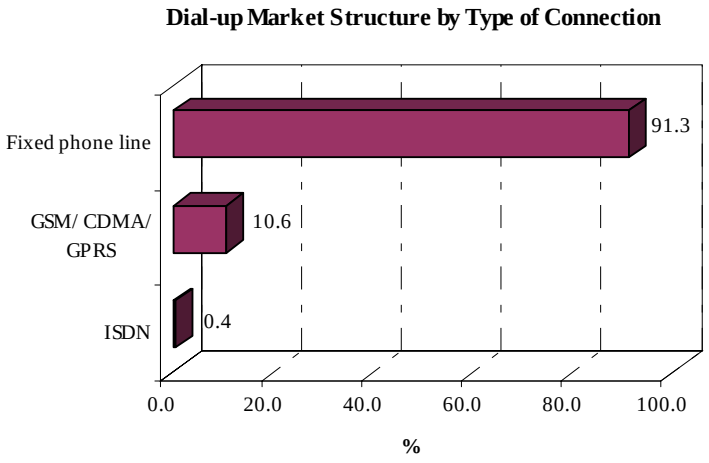
7. DIAL-UP INTERNET MARKET[1]

7.1. Dial-up Market Structure by Type of Connection

Q17. You've said you use the Internet at home. What type of Internet connection do you use?

Dial-up Market Structure by Type of Connection	%* of households (base=409)
Fixed phone line	91.3
GSM/ CDMA/ GPRS	10.6
ISDN	0.4

** Multiple answer*



The *fixed phone line* is the most used dial-up connection (91.3% of the households using dial-up connections use a fixed phone line).

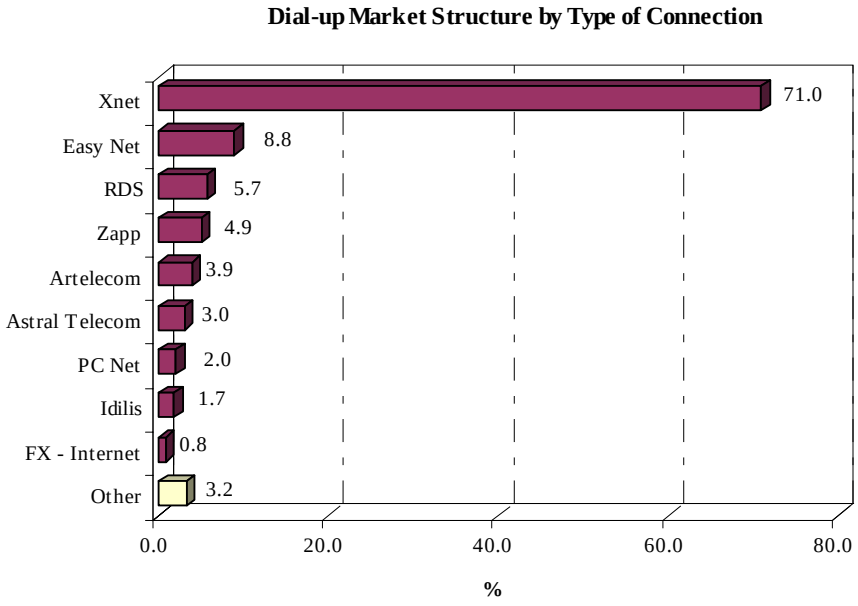
[1] *Unweighted base*
The analysis in this chapter was done on the households in which there is at least one Dial-up Home Internet User.

7.2. Dial-up Internet Services Providers Usage

Q19. What Internet providers do you have for each type of connection you use?

Dial-up Internet Services Providers Usage	% of households (base=409)
Xnet	71.0
Easy Net	8.8
RDS	5.7
Zapp	4.9
Artelecom	3.9
Astral Telecom	3.0
PC Net	2.0
Idilis	1.7
FX - Internet	0.8
Other	3.2

** Multiple answer*



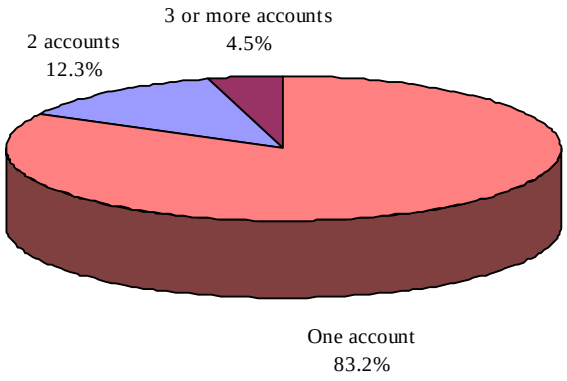
Most used dial-up Internet provider is by far Xnet (71.0%), followed at a great distance by Easy Net (8.8%) and RDS (5.7%).

7.3. Number of Dial-up Accounts

Q26. How many Internet dial-up accounts, whether paid or free, do you use at home?

Number of Dial-up Accounts	**% of households (base=409)**
One account	83.2
2 accounts	12.3
3 or more accounts	4.5
Total	**100.0**
Average number of dial-up accounts	***1.21***

Number of Dial-up Accounts



The large majority of the households in which a dial-up Internet connection is used, have a single dial-up account.

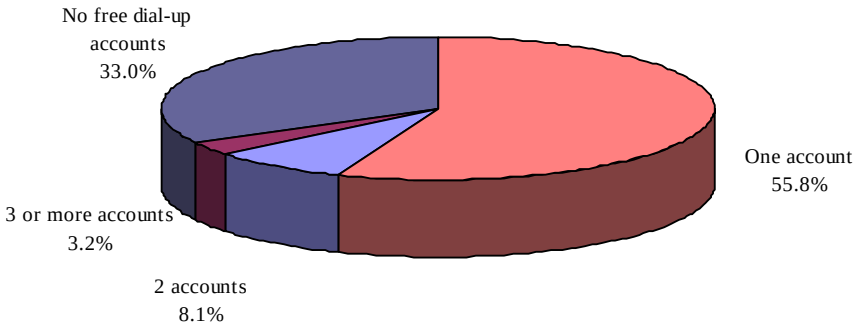
7.3.1. Number of Free Dial-up Accounts

Q26. How many Internet dial-up accounts, whether paid or free, do you use at home?/ Q27. How many of these are paid Internet accounts?

Number of Free Dial-up Accounts	**% of households (base=409)**
One account	55.8
2 accounts	8.1
3 or more accounts	3.2
No free dial-up accounts	32.9
Total	**100.0**
Average number of free dial-up accounts*	***1.05***

** Was computed on households with free dial-up accounts*

Number of Free Dial-up Accounts



Half of the households with dial-up connections use a single free Internet account.

One out of three households with dial-up Internet access, uses only paid dial-up accounts.

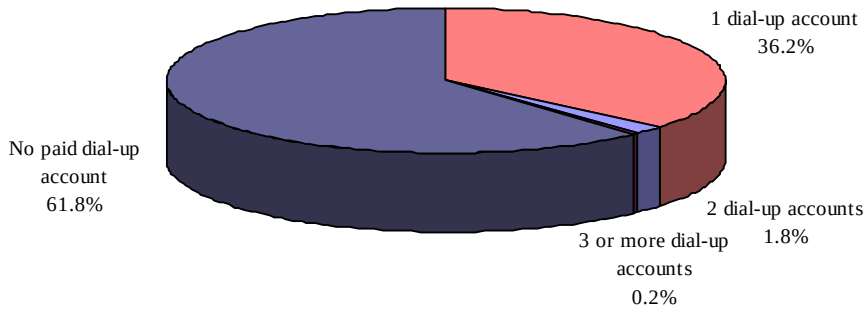
7.3.2. Number of Paid Dial-up Accounts

Q27. How many of these are paid Internet accounts?

Number of Paid Dial-up Accounts	**% of households (base=409)**
One account	36.2
2 accounts	1.8
3 or more accounts	0.2
No paid dial-up accounts	61.8
Total	**100.0**
Average number of paid dial-up accounts*	***1.22***

** Was computed on households with paid dial-up accounts*

Number of Paid Dial-up Accounts



Approximately two out of three households connected to Internet through dial-up connections use only free accounts.

One out of three households with dial-up connections use a single paid account.

7.4. Internet Related Expenses

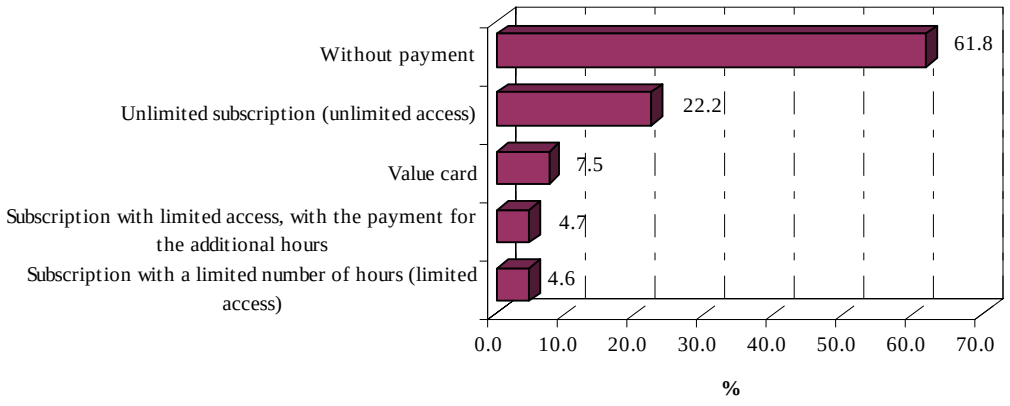
7.4.1. Methods of Paying for the Dial-up Internet Access

Q28. What ways of payment do you use for each type of dial-up connection you use?

Methods of Paying for the Dial-up Internet Access	%* of households (base=409)
Without payment/ Free accounts	**61.8**
With payment	**38.2**
Unlimited subscription (unlimited access)	22.2
Value card	7.5
Subscription with limited access, with the payment for the additional hours	4.7
Subscription with a limited number of hours (limited access)	4.6
Total	**100.0**

** Multiple answer*

Methods of Paying for the Dial-up Internet Access



The *unlimited subscription (unlimited access*) is used in the majority (22.2%) of the households which use paid dial-up Internet accounts.

Another method of payment used is the *value card* (7.5%).

Q29. How many hours per month has this subscription?

Hours Included in Subscription with Limited Access, with the Payment for the Additional Hours	**%* of households (base=23)**
10 hours or less	37.8
10 - 20	25.4
More than 20 hours	18.8
DK/ NA	17.9
Total	**100.0**
Average number of hours	***17.84***

** Base: Households in which there is a subscription with limited access, with the payment for the additional hours*
Treat data with caution due to the small base

Q29. How many hours per month has this subscription?

Hours Included in Subscription with Limited Number of Hours	**%* of households (base=27)**
10 hours or less	40.6
10 - 20	23.5
More than 20 hours	22.0
DK/ NA	13.9
Total	**100.0**
Average number of hours	***18.11***

** Base: Households in which there is a subscription with limited number of hours*
Treat data with caution due to the small base

7.4.2. Monthly Expenses with Dial-up Internet Services (without the Telephone Bill)

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile

Method of Paying for Dial-up Internet Services (without the Telephone Bill)	Average monthly expenses (USD, including VAT)*
Unlimited subscription (unlimited access)	10.71
Value card	6.81
Subscription with limited access, with the payment for the additional hours	8.76
Subscription with a limited number of hours (limited access)	8.12
Total Monthly Expenses with the Dial-up Internet Access	**9.98**

** Base: Households in which there is at least one paid dial-up account*
USD 1 = ROL 33,000

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile

Total Monthly Expenses with Dial-up Internet Access (without the Telephone Bill) - USD, including VAT	%* of households (base=182)
Less than 5	23.7
[5 - 10]	37.0
(10 - 15]	18.3
(15 - 25]	13.0
More than 25	8.0
Total	**100.0**
Average monthly expenses (USD, including VAT)	***9.98***

** Base: Households in which there is at least one paid dial-up account*
USD 1 = ROL 33,000

The largest monthly expenses with dial-up Internet services (regardless of the telephony bill) are supported by those who use unlimited subscriptions (USD10.71 per month).

Also, 60.7% of paid dial-up accounts users, spend USD10 or less each month for their dial-up account.

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile

Monthly Expenses with Dial-up Unlimited Subscription (without the Telephone Bill) - USD, including VAT	**%* of households (base=105)**
Less than 5	21.2
[5 - 10]	32.3
(10 - 15]	18.8
(15 - 25]	13.1
More than 25	12.1
DK/ NA	2.5
Total	**100.0**
Average monthly expenses (USD, including VAT)	***10.71***

** Base: Households in which there is a dial-up unlimited subscription*
USD 1 = ROL 33,000

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VTA. Do not include the price of using the telephony service / landline or mobile

Monthly Expenses with Dial-up Value Card (without the Telephone Bill) - USD, including VAT	**%* of households (base=31)**
Less than 5	41.7
[5 - 10]	29.0
(10 - 15]	12.2
More than 15	17.1
Total	**100.0**
Average monthly expenses (USD, including VAT)	***6.81***

** Base: Households in which there is a dial-up value card*
USD 1 = ROL 33,000

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile

Monthly Expenses with Dial-up Subscription with Limited Access, with the Payment for the Additional hours (without the Telephone Bill) - USD, including VAT	**%* of households (base=23)**
Less than 5	20.6
[5 - 10]	40.8
(10 - 15]	17.5
More than 15	16.5
DK/ NA	4.7
Total	**100.0**
Average monthly expenses (USD, including VAT)	***8.76***

** Base: Households in which there is a dial-up subscription with limited access, with the payment for the additional hours*
USD 1 = ROL 33,000
Treat data with caution due to the small base

Q30. How much do you spend, in average, each month, depending on the type of payment you use. Please express this cost in ROL, including VAT. Do not include the price of using the telephony service / landline or mobile

Monthly Expenses with Dial-up Subscription with a Limited Number of Hours (without the Telephone Bill) - USD, including VAT	**%* of households (base=27)**
Less than 5	5.8
[5 - 10]	62.4
(10 - 15]	23.1
More than 15	8.7
Total	**100.0**
Average monthly expenses (USD, including VAT)	***8.12***

** Base: Households in which there is a dial-up subscription with a limited number of hours*
USD 1 = ROL 33,000
Treat data with caution due to the small base

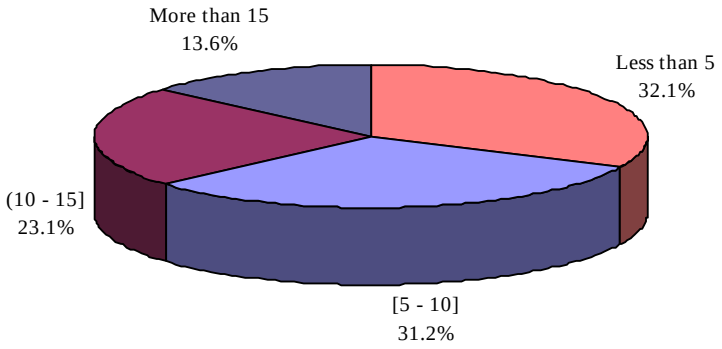
7.4.3. Monthly Telephone Expenses with Dial-Up Internet Access

Q31. How much do you spend on average, each month with the telephony service you use for connecting to the Internet?

Monthly Telephone Expenses with Dial-Up Internet Access (USD, including VAT)	**% of households (base=409)**
Less than 5	32.1
[5 - 10]	31.2
(10 - 15]	23.1
More than 15	13.6
Total	**100.0**
Average monthly expenses (USD, including VAT)	***9.46***

USD 1 = ROL 33,000

Monthly Telephone Expenses with Dial-Up Internet Access (USD, including VAT)



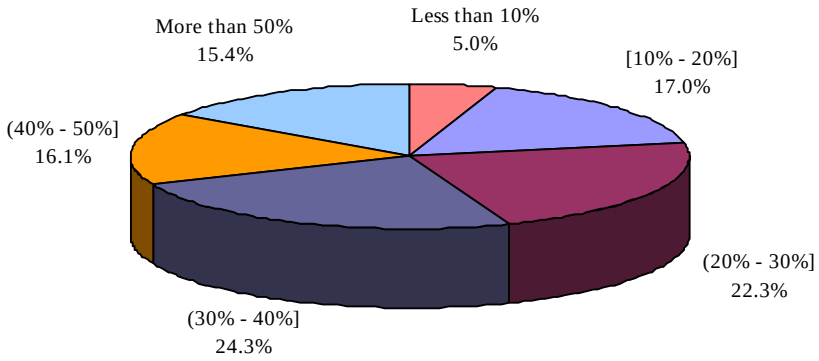
63.3% of dial-up Internet users spend USD10 or less each month with the telephony bill for the Internet access.

7.4.4. Monthly Weight of Internet Related Expenses in the Telephone Bill

Q31. How much do you spend on average, each month with the telephony service you use for connecting to the Internet?

Monthly Weight of Internet Related Expenses in the Telephone Bill	**% of households (base=409)**
Less than 10%	5.0
[10% - 20%]	17.0
(20% - 30%]	22.3
(30% - 40%]	24.3
(40% - 50%]	16.1
More than 50%	15.4
Total	**100.0**
Average weight (%)	***32.73***

Monthly Weight of Internet Related Expenses in the Telephone Bill



For 46.6% of dial-up users, the monthly weight of Internet related expenses in the telephone bill is between 20% and 40%.

7.5. Interest in ISDN Connections

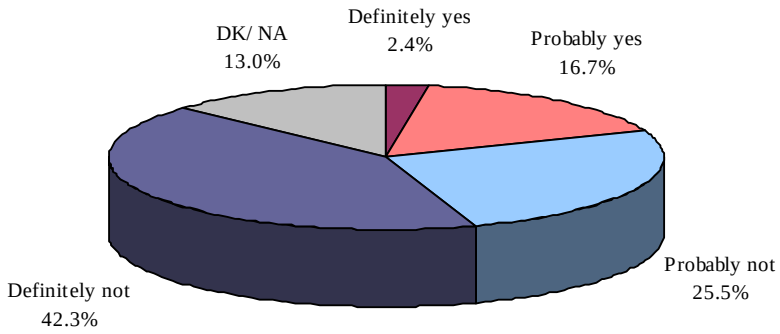
7.5.1. Intention to Acquire an ISDN Connection in the Next 12 Months

Q34. How likely if for you to acquire an ISDN connection in the next 12 months?

Intention to Acquire an ISDN Connection in the Next 12 Months	**%* of households (base=407)**
Definitely yes	2.4
Probably yes	16.7
Probably not	25.5
Definitely not	42.3
DK/ NA	13.0
Total	**100.0**
Mean **	***1.76***

** Base: Households with dial-up Internet access through other type of connection than ISDN*
*** Scale: 1 = definitely not, …, 4 = definitely yes*

Intention to Acquire an ISDN Connection in the Next 12 Months



The interest in ISDN connections is rather low, only in 19.1% of the households with dial-up connections an ISDN connection *would (definitely or probably) be bought* in the next 12 months.

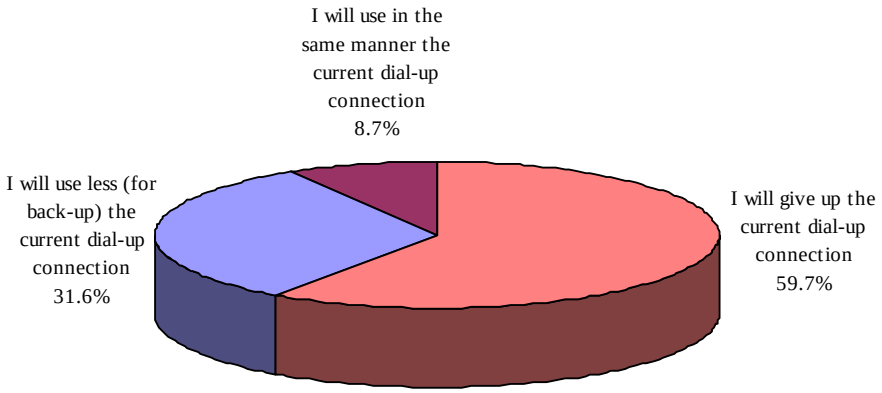
7.5.2. Intended Usage of the Current Dial-up Connection in Case of ISDN Upgrading

Q35. What do you think you will do with the dial-up connection/s you currently use?

Intended Usage of the Current Dial-up Connection in Case of ISDN Upgrading	**%* of households (base=73)**
I will give up the current dial-up connection	59.7
I will use less (for back-up) the current dial-up connection	31.6
I will use in the same manner the current dial-up connection	8.7
Total	**100.0**

** Base: Households with dial-up Internet access in which an ISDN Connection would (definitely or probably) be acquired in the next 12 months*

Intended Usage of the Current Dial-up Connection in Case of ISDN Upgrading



Most probably, after acquiring an ISDN connection, the other dial-up connection *won't be used any more* (59.7%) or it *will be used less, for back-up* (31.6%)

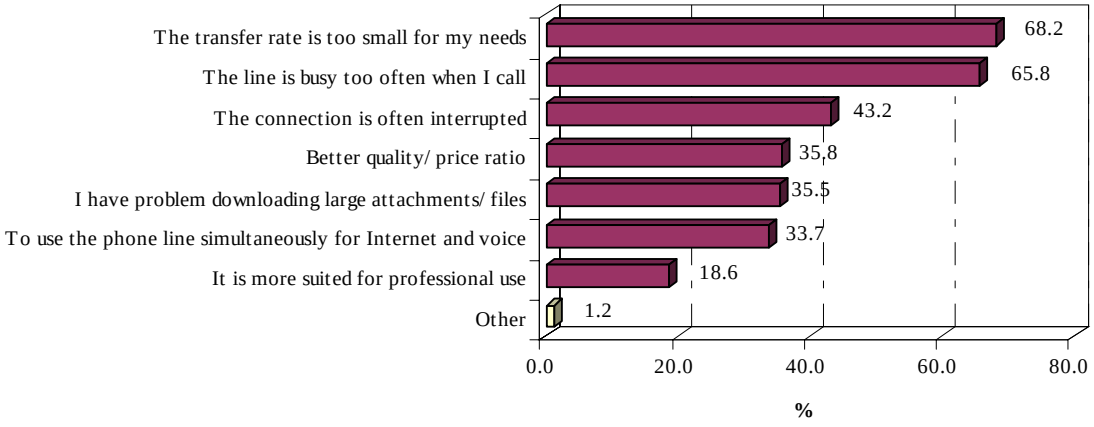
7.5.3. Reasons for Considering an ISDN Connection

Q36. Which would be the reasons for intending to acquire an ISDN connection in the next 12 months?

Reasons for Considering an ISDN Connection	**%* of households (base=73)**
The transfer rate is too small for my needs	68.2
The line is busy too often when I call	65.8
The connection is often interrupted	43.2
Better quality/ price ratio	35.8
I have problem downloading large attachments/ files	35.5
To use the phone line simultaneously for Internet and voice	33.7
It is more suited for professional use	18.6
Other	1.2

** Base: Households with dial-up Internet access in which an ISDN Connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer

Reasons for Considering an ISDN Connection



Main reasons for considering an ISDN connection are *the small transfer rate of the current dial-up connection* (68.2%) and the fact that *the line is busy to often when trying to establish a connection*, in the case of the current dial-up connection (65.8%).

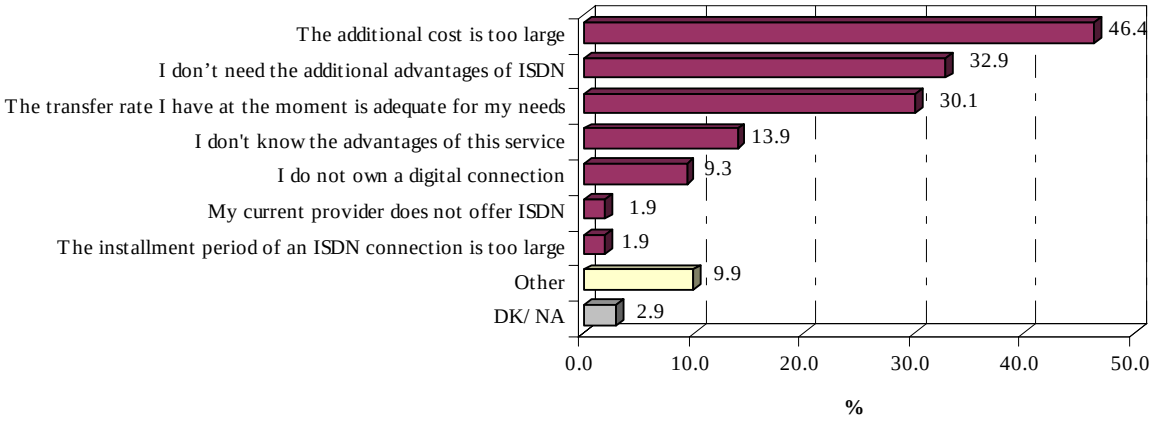
7.5.4. Reasons for NOT Considering an ISDN Connection

Q37. Which would be the reasons for NOT intending to acquire an ISDN connection in the next 12 months?

Reasons for NOT Considering an ISDN Connection	**%* of households (base=272)**
The additional cost is too large	46.4
I don't need the additional advantages of ISDN	32.9
The transfer rate I have at the moment is adequate for my needs	30.1
I don't know the advantages of this service	13.9
I do not own a digital switch board	9.3
My current provider does not offer ISDN	1.9
The installment period of an ISDN connection is too large	1.9
Other	9.9
DK/ NA	2.9

** Base: Households with dial-up Internet access in which an ISDN Connection would not (definitely or probably) be acquired in the next 12 months*
Multiple answer

Reasons for NOT Considering an ISDN Connection



As for reasons against an ISDN connection, most mentioned were: *the additional cost, which is too large* (46.4%), *the additional advantages are not necessary* (32.9%) and the fact that *the current dial-up connections offers a satisfactory transfer rate* (30.1%).

7.6. Interest in Dedicated Internet Services

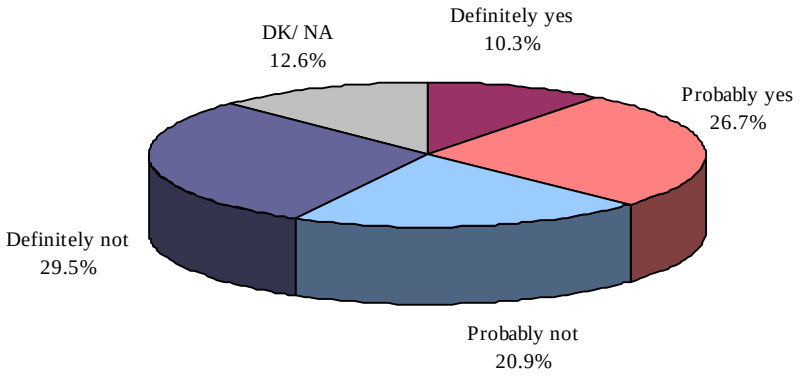
7.6.1. Intention to Acquire a Dedicated Connection in the Next 12 Months

Q38. How likely is for you to acquire a dedicated connection in the next 12 months?

Intention to Acquire a Dedicated Connection in the Next 12 Months	%* of households (base=398)
Definitely yes	10.3
Probably yes	26.7
Probably not	20.9
Definitely not	29.5
DK/ NA	12.6
Total	**100.0**
Mean **	***2.20***

** Base: Households in which there is only a dial - up connection*
*** Scale: 1 = definitely not, …, 4 = definitely yes*

Intention to Acquire a Dedicated Connection in the Next 12 Months



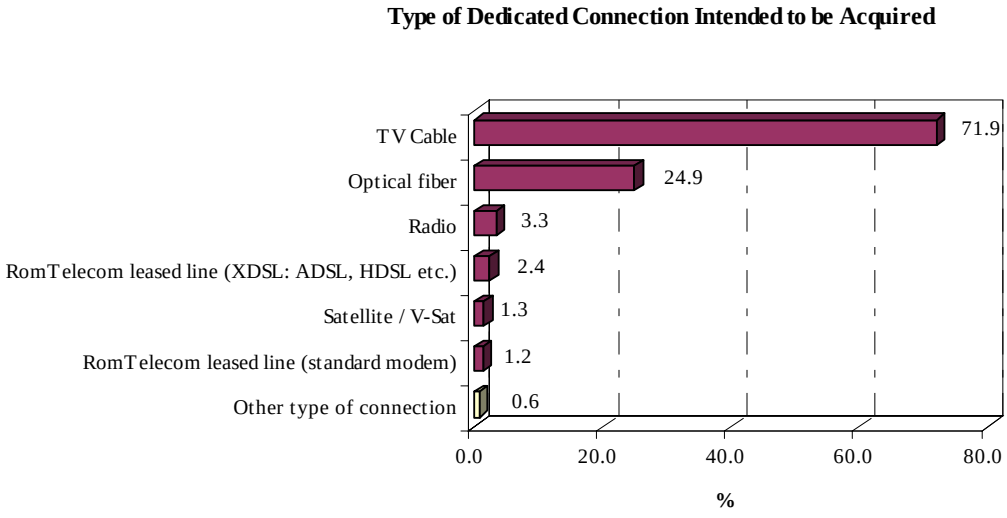
In 37.0% of the households with dial-up connections there is an interest for dedicated connections, one *would (definitely or probably) be acquired* in the next 12 months.

7.6.2. Type of Dedicated Connection Intended to be Acquired

Q39. What type of connection do you intend to acquire?

Type of Dedicated Connection Intended to be Acquired	%* of households (base=142)
TV Cable	71.9
Optical fiber	24.9
Radio	3.3
RomTelecom leased line (XDSL: ADSL, HDSL etc.)	2.4
Satellite / V-Sat	1.3
RomTelecom leased line (standard modem)	1.2
Other type of connection	0.6

** Base: Households with dial-up Internet access in which a dedicated connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer



The main type of dedicated connection intended to be acquired is through *TV Cable* (71.9%). Other type of dedicated connection preferred is through *optical fiber* (24.9%).

7.6.3. Intended Bandwidth for the Dedicated Connection Intended to be Acquired

Q40. What bandwidth do you want to use for this connection?

Intended Bandwidth for the Dedicated Connection Intended to be Acquired	%* of households (base=142)
<64 kbps	5.8
64 kbps	15.7
128 kbps	47.8
256 kbps	5.2
512 kbps	5.3
1024 kbps	0.5
2084 kbps (2 Mbps)	1.1
>2084 kbps (2 Mbps)	0.8
DK/NA	18.0
Total	**100.0**

** Base: Households with dial-up Internet access in which a dedicated connection would (definitely or probably) be acquired in the next 12 months*

Regarding the bandwidth of the dedicated connection intended to be acquired, in most cases users preferred the 128 kbps one.

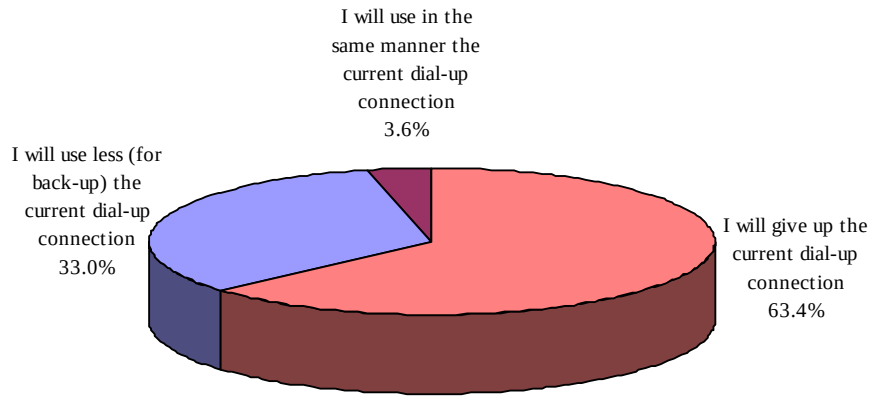
7.6.4. Intended Usage of the Current Dial-up Connection in Case of Dedicated Connection Upgrading

Q41. What do you think you will do with the dial-up connection/s you currently use?

Intended Usage of the Current Dial-up Connection in Case of Dedicated Connection Upgrading	**%* of households (base=142)**
I will give up the current dial-up connection	63.4
I will use less (for back-up) the current dial-up connection	33.0
I will use in the same manner the current dial-up connection	3.6
Total	**100.0**

** Base: Households with dial-up Internet access in which a dedicated connection would (definitely or probably) be acquired in the next 12 months*

Intended Usage of the Current Dial-up Connection in Case of Dedicated Connection Upgrading



In most cases (63.4%) the members of the household would *give up the dial-up connection* currently used after acquiring the dedicated connection.

Also, in 33% of the households the dial-up connection *would be used for back-up*, together with the new dedicated connection.

7.6.5. Reasons for Considering a Dedicated Connection

Q42. Which would be the reasons for intending to acquire a dedicated connection in the next 12 months?

Reasons for Considering a Dedicated Connection	**%* of households (base=142)**
Higher transfer rate	77.9
Permanent access to Internet/ e-mail/ online services	64.9
Higher speed when downloading large attachments/ files	64.6
Higher availability of the service (the connection doesn't interrupt often)	57.5
Better quality/ price ratio	38.4
The line is busy too often when I call	35.2
The need for using certain services at higher quality standards (real time transactions, media services etc.)	24.9
It is more suited for professional use	13.1
Other	0.4
DK/ NA	5.1

** Base: Households with dial-up Internet access in which a dedicated connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer

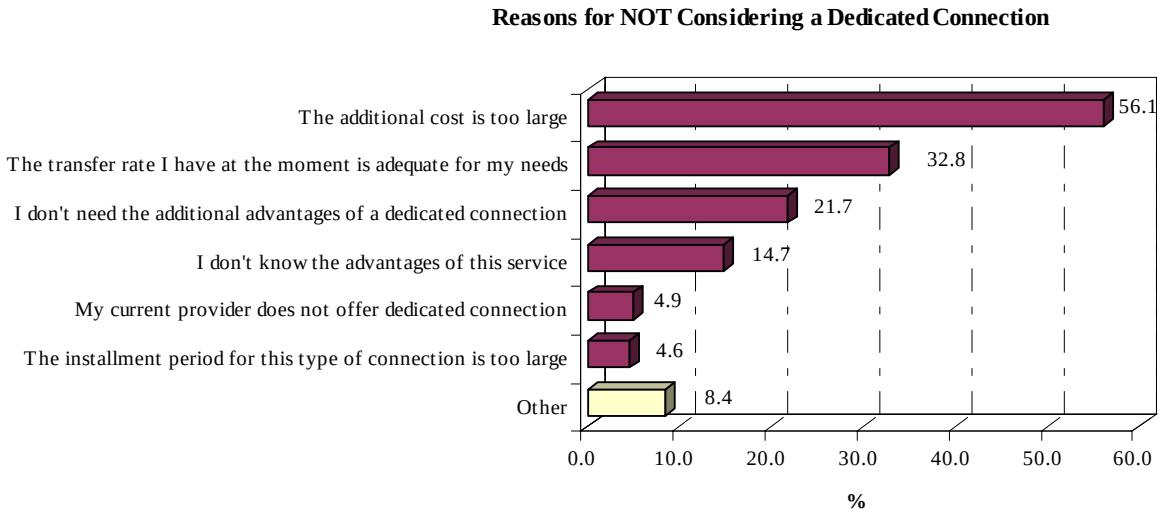
Most important reasons for considering a dedicated connection instead of a connection through dial-up are *the higher transfer rate* (77.9%), the *permanent access to Internet/ e-mail/ on-line services* (64.9%) and *the higher speed when downloading large attachments/ files* (64.6%).

7.6.6. Reasons for NOT Considering a Dedicated Connection

Q43. Which would be the reasons for NOT intending to acquire a dedicated connection in the next 12 months?

Reasons for NOT Considering a Dedicated Connection	%* of households (base=204)
The additional cost is too large	56.1
The transfer rate I have at the moment is adequate for my needs	32.8
I don't need the additional advantages of a dedicated connection	21.7
I don't know the advantages of this service	14.7
My current provider does not offer dedicated connection	4.9
The installment period for this type of connection is too large	4.6
Other	8.4

** Base: Households with dial-up Internet access in which a dedicated connection would not (definitely or probably) be acquired in the next 12 months*
Multiple answer



When switching from dial-up to dedicated connections, most important barrier perceived is *the additional cost*, which is considered *too large* (56.1%).

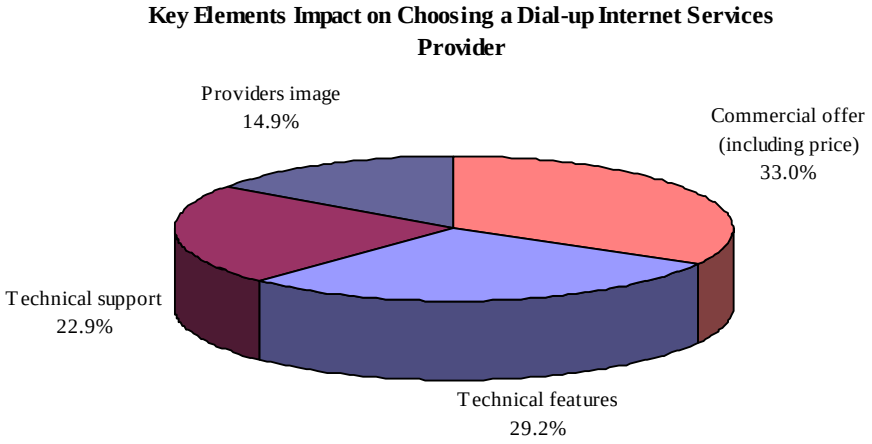
Other important reasons for not considering a dedicated connection are *the transfer rate*, which at the moment is considered *adequate to their needs* (32.8%) and the fact that *the additional advantages of a dedicated connection are not necessary* (21.7%).

7.7. Dial-up Internet Services Providers Evaluation

7.7.1. Key Elements Impact on Choosing a Dial-up Internet Services Provider

Q47. When you choose a dial-up Internet provider, how important are each of the following aspects? Please split 100 points between the following elements depending on how important are each of them for you personally.

Key Elements Impact on Choosing a Dial-up Internet Services Provider	% of persons (out of 100 points) (base=409)
Commercial offer (including price)	33.0
Technical features	29.2
Technical support	22.9
Providers image	14.9
Total	**100.0**



When choosing a dial-up Internet provider, most important elements are *the commercial offer* (including price) (33.0%) and *the technical features* (29.2%).

7.7.2. Benefits Sought in a Dial-up Internet Services Provider

Q44. Now I will show you a list with the main attributes of a dial-up provider. Please choose from this list exactly 5 attributes which you personally consider the most important for a dial-up Internet provider.
Q45. Now I would like you to rate all the attributes from this card for the dial-up Internet provider/s you have. You have the following options 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.
Q46. How satisfied are you, in general, with the dial-up services offered by the Internet provider(s) to your company? You have the following options: 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.

Benefits Sought in a Dial-up Internet Services Provider	Stated Importance % * of persons (base=409)	Derived Importance**
ENTRY TICKETS		
Calls price	55.6	0.36
The price of the subscription	53.2	0.32
KEY DRIVERS		
Network availability (not to be busy)	63.9	0.50
Enduring quality of services	58.6	0.59
Data transfer rate	53.9	0.57
Technical support quality	50.4	0.56
VALUE - ADDED		
Connection/ logon time	33.4	0.56
Provider's reputation	19.2	0.56
LOW YIELDS		
Accounts safety	36.5	0.44
Bill plans diversity	24.9	0.40
The quality of the customer service	18.4	0.43
Upgrading to superior services	17.8	0.42
Solving promptly the network problems	12.0	0.47

** Multiple answer (exactly 5 options)*
*** Correlation with overall satisfaction*

In order to classify the attributes of dial-up Internet services providers, we used Kano Model, which helps understand the importance of these attributes to a customer (in our case, dial-up Internet connections users). This model divides the attributes in four categories:

- ***Must Attributes/ Entry Tickets*** (basic or expected attributes): these are essential attributes of performance and do not offer any real opportunity for dial-up Internet services differentiation.

Providing *must attributes* will do little to enhance overall customer satisfaction, but removing or performing poorly on them will reduce customer satisfaction and lead to customer complaints. In our survey, the *must attributes* are:

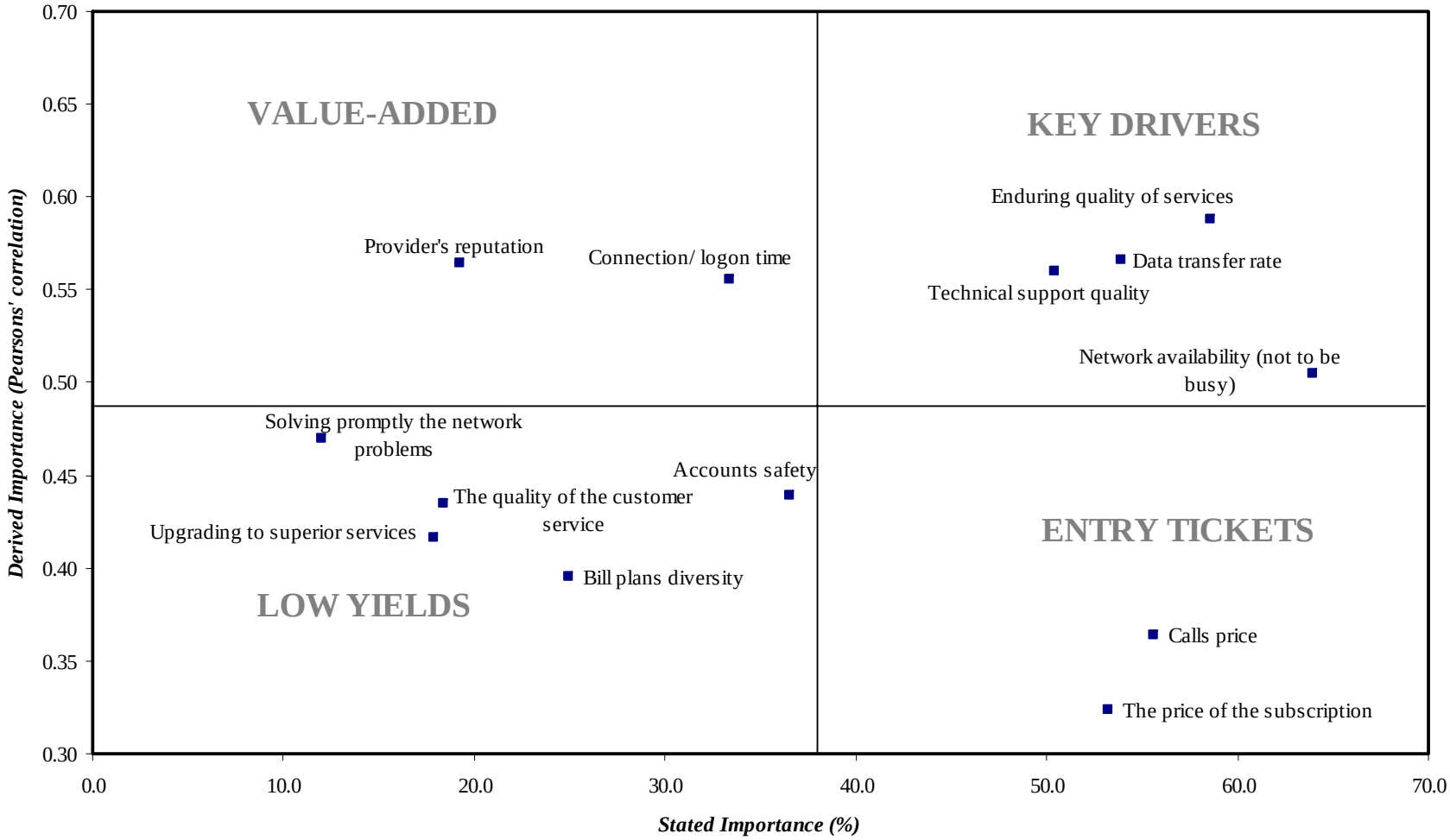
- *Calls price*
- *The price of the subscription*

- ***Key Drivers*** (or performance attributes): they exhibit a linear relationship between dial-up Internet services and users satisfaction. When dial-up Internet services providers' performance on these attributes improves, the users satisfaction increases, too. Adding more attributes of this type will also raise the users satisfaction. In our case, the *key drivers* are:
  - *Enduring quality of services*
  - *Network availability (not to be busy)*
  - *Data transfer rate*
  - *Technical support quality*

- ***Value Added*** (or excitement attributes): they are unexpected attributes which, when provided, generate high customer enthusiasm and satisfaction. When these "nice-to-have" attributes are not available, it does not lead to customer dissatisfaction. Creation of some excitement features will differentiate the dial-up Internet providers from its competitors. For the present research they are, as follows:
  - *Provider's reputation*
  - *Connection/ logon time*

- ***Low Yields***: they have low influence on overall satisfaction of the readers:
  - *Upgrading to superior services*
  - *Bill plan diversity*
  - *Solving promptly the network problems*
  - *The quality of the customer service*
  - *Accounts safety*

Dual Importance Grid



7.7.3. Providers Evaluation

Q44. Now I will show you a list with the main attributes of a dial-up provider. Please choose from this list exactly 5 attributes which you personally consider the most important for a dial-up Internet provider.
Q45. Now I would like you to rate all the attributes from this card for the dial-up Internet provider/s you have. You have the following options 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.
Q46. How satisfied are you, in general, with the dial-up services offered by the Internet provider(s) to your company? You have the following options: 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.

Providers Evaluation	**Xnet(1) (base=279)**	**Easy Net(2) (base=39)**	**RDS(3)* (base=27)**	**Zapp* (base=18)**	**Artelecom (base=17)***	**Astral Telecom* (base=15)**
	Mean**					
Overall satisfaction	x	x	x	x	x	x
The quality of the services	x	x	x	x	x	x
ENTRY TICKETS						
Calls price	x	x	x	x	x	x
The price of the subscription	x	x	x	x	x	x
KEY DRIVERS						
Network availability (not to be busy)	x	x	x	x	x	x
Enduring quality of services	x	x	x	x	x	x
Data transfer rate	x	x	x	x	x	x
Technical support quality	x	x	x	x	x	x
VALUE - ADDED						
Connection/ logon time	x	x	x	x	x	x
Provider's reputation	x	x	x	x	x	x
LOW YIELDS						
Accounts safety	x	x	x	x	x	x
Bill plans diversity	x	x	x	x	x	x
The quality of the customer service	x	x	x	x	x	x
Upgrading to superior services	x	x	x	x	x	x
Solving promptly the network problems	x	x	x	x	x	x

** Treat data with caution due to the small bases*
*** Scale: 1 = very dissatisfied, …, 7 = very satisfied*
Statistical significant differences between percents (1, 2, 3) (level of confidence 95%)

* There were excluded confidential data regarding the comparative Internet providers evaluation

8. DEDICATED INTERNET MARKET[1]

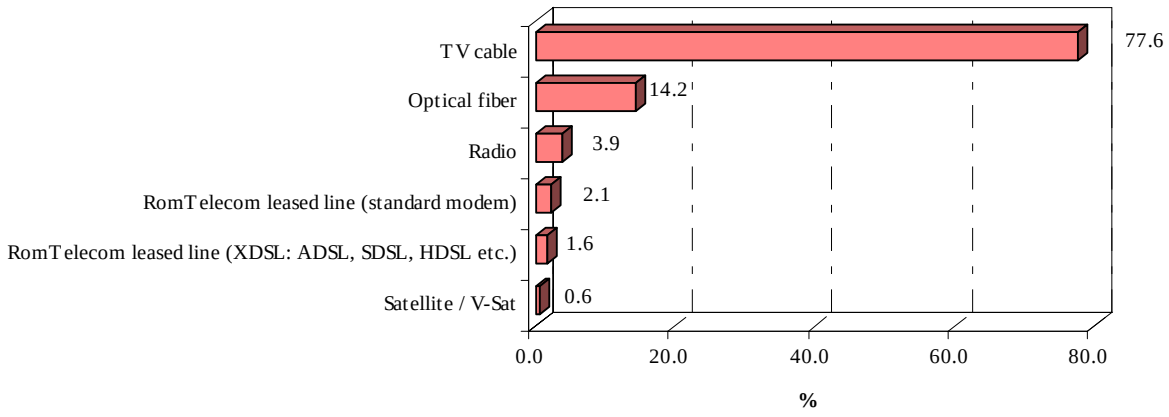
8.1. Dedicated Internet Market Structure by Type of Connection

Q17. You've said you use the Internet at home. What type of Internet connection do you use?

Dedicated Internet Market Structure by Type of Connection	%* of households (base=118)
TV cable	77.6
Optical fiber	14.2
Radio	3.9
RomTelecom leased line (standard modem)	2.1
RomTelecom leased line (XDSL: ADSL, SDSL, HDSL etc.)	1.6
Satellite / V-Sat	0.6

** Multiple answer*

Dedicated Internet Market Structure by Type of Connection



[1] *Unweighted base*
The analysis in this chapter was done on the households in which there is at least one Dedicated Home Internet User.

Most used dedicated connection is through *TV cable* (77.6%). The dedicated connection through *optical fiber* is used by 14.2% of dedicated connections users.

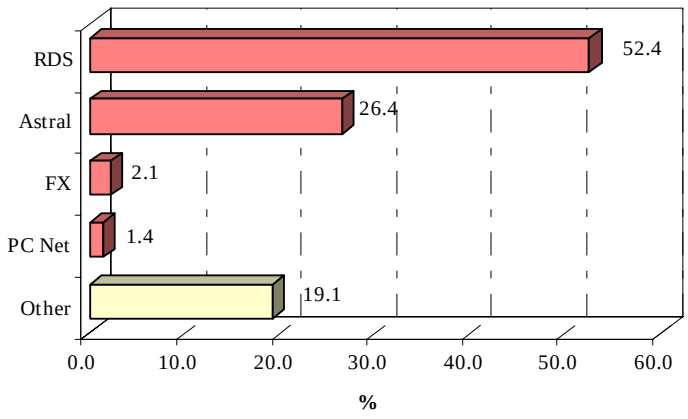
8.2. Dedicated Internet Services Providers Usage

Q19. What Internet providers do you have for each type of connection you use?

Dedicated Internet Services Providers Usage	% of households (base=118)
RDS	52.4
Astral Telecom	26.4
FX - Internet	2.1
PC Net	1.4
Other	19.1

** Multiple answer*

Dedicated Internet Market Structure by Type of Connection

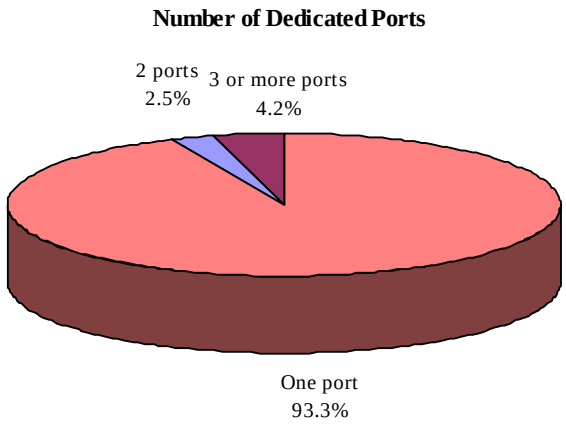


RDS (52.4%) and *Astral Telecom* (26.4%) are the two main used Internet dedicated providers.

8.3. Number of Dedicated Ports

Q48. How many dedicated ports (gateways) do you use?

Number of Dedicated Ports	% of households (base=118)
One port	93.3
2 ports	2.5
3 or more ports	4.2
Total	**100.0**



In the large majority of the households using a dedicated connection, there is a single dedicated port.

8.4. Methods of Paying for the Dedicated Connection

Q49. What type of subscription do you have for each type of dedicated connection you own?

Methods of Paying for the Dedicated Connection	**% of households (base=118)**
Monthly subscription for unlimited traffic	58.7
Monthly subscription for limited traffic with the payment for the additional traffic	39.4
DK/ NA	1.9
Total	**100.0**

Q49. What type of subscription do you have for each type of dedicated connection you own?/

Monthly MB Included in Subscription for Limited Traffic with the Payment for the Additional Traffic	**%* of households (base=44)**
100 MB or less	19.2
100 - 500 MB	42.2
More than 500 MB	17.5
DK/ NA	21.1
Total	**100.0**
Average number of MB per month	***493.45***

** Base: Households that have a monthly subscription for limited traffic with the payment for the additional traffic*

Main methods of payment used in the case of dedicated connections are the *monthly subscription for unlimited traffic* (58.7%) and also, the *monthly subscription for limited traffic with the payment for the additional traffic* (39.4%).

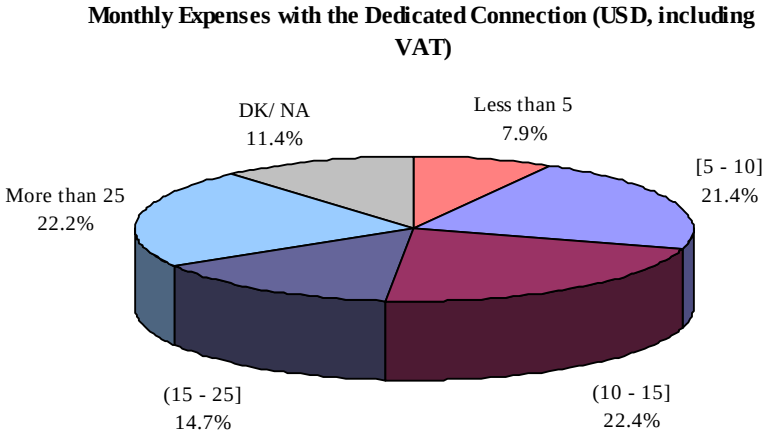
61.4% of Internet users who have subscriptions with limited traffic with the payment for the additional traffic have a monthly traffic of 500MB or less included in the subscription.

8.5. Monthly Expenses with the Dedicated Connection

Q50. How much do you spend, on average, each month for every dedicated connection you own? Please express these spending in ROL, including VAT.

Monthly Expenses with the Dedicated Connection (USD, including VAT)*	**% of households (base=118)**
Less than 5	7.9
[5 - 10]	21.4
(10 - 15]	22.4
(15 - 25]	14.7
(25 - 35]	4.2
(35 - 50]	17.0
More than 50	1.0
DK/ NA	11.4
Total	**100.0**
Average monthly expenses (USD, including VAT)	***15.55***

USD 1 = ROL 33,000

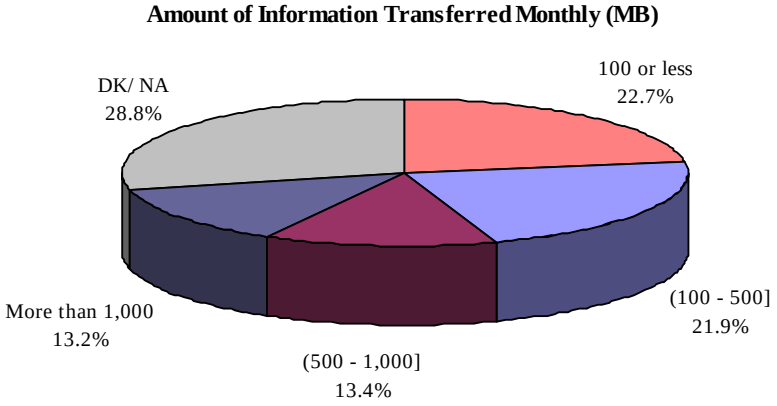


The majority of dedicated connections users (51.7%) spend USD15 or less per month for their Internet connection.

8.6. Amount of Information Transferred Monthly

Q51. How many MB do you transfer, on average, in a month?

Amount of Information Transferred Monthly (MB)	**% of households (base=118)**
100 or less	22.7
(100 - 500]	21.9
(500 - 1,000]	13.4
More than 1,000	13.2
DK/ NA	28.8
Total	**100.0**
Mean	***578.02***



The monthly amount of information transferred through a dedicated connection is 550 to 600 MB.

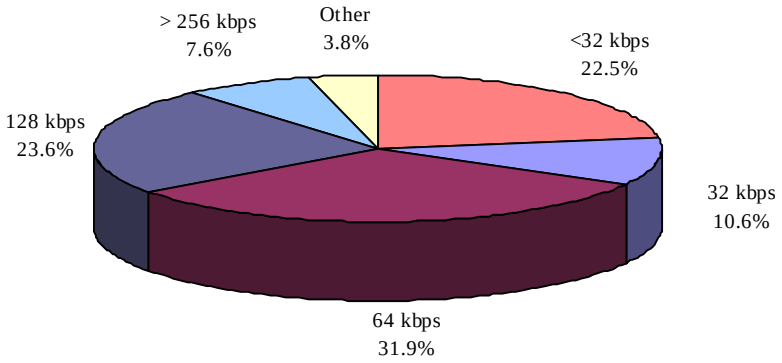
8.7. Average Bandwidth Used

8.7.1. Committed Information Rate

Q53. What is the committed bandwidth offered by your provider/s of dedicated services?

Committed Information Rate	% of households (base=118)	Normalized Percents
<32 kbps	13.9	22.5
32 kbps	6.6	10.6
64 kbps	19.8	31.9
128 kbps	14.6	23.6
256 kbps	1.7	2.8
1024 kbps/ (1Mb/s)	2.1	3.4
> 2048 kbps (2Mb/s)	0.9	1.4
Other	2.4	3.8
DK/ NA	38.0	-
Total	**100.0**	**100.0**

Committed Information Rate



Most dedicated connections used have a committed bandwidth of 64 kbps or 128 kbps (19.8% and 14.6%).

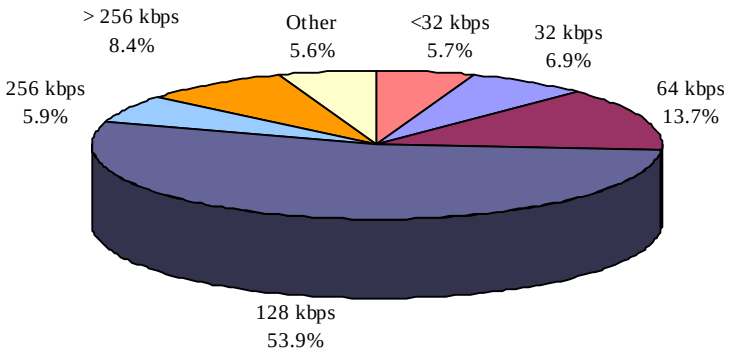
There is a large percentage (38.0%) of households in which members do not know the committed information rate of their dedicated connection.

8.7.2. Maximum Information Rate

Q53. And what is the maximum bandwidth offered by your provider/s of dedicated services?

Maximum Information Rate	% of households (base=118)	Normalized Percents
<32 kbps	3.1	5.7
32 kbps	3.7	6.9
64 kbps	7.4	13.7
128 kbps	29.3	53.9
256 kbps	3.2	5.9
1024 kbps/ (1Mb/s)	3.1	5.6
2048 kbps (2Mb/s)	0.6	1.1
> 2048 kbps (2Mb/s)	0.9	1.6
Other	3.1	5.6
DK/ NA	45.6	-
Total	**100.0**	**100.0**

Maximum Information Rate



Regarding the maximum bandwidth of a dedicated connection used inside the household, most common is the 128 kbps one (29.3%).

8.8. Bandwidth Upgrading

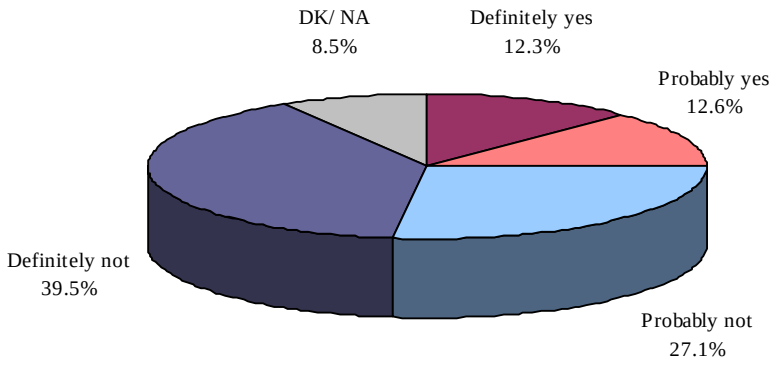
8.8.1. Intention to Upgrade the Bandwidth

Q54. How likely is for you to upgrade the bandwidth of your dedicated connection/s you currently own?

Intention to Upgrade the Bandwidth	**% of households (base=118)**
Definitely yes	12.3
Probably yes	12.6
Probably not	27.1
Definitely not	39.5
DK/ NA	8.5
Total	**100.0**
Mean*	***1.97***

** Scale: 1 = definitely not, …, 4 = definitely yes*

Intention to Upgrade the Bandwidth



There is a small interest in bandwidth upgrading, in the majority of cases (66.6%), the bandwidth *would (definitely or probably) not be upgraded.*

8.8.2. Intended Bandwidth Wanted to Upgrade

Q56. To what bandwidth you wish to upgrade?

Intended Bandwidth Wanted to Upgrade	**%* of households (base=31)**
64 kbps	6.0
128 kbps	31.9
256 kbps	6.0
512 kbps	8.8
1024 kbps	6.0
2048 kbps (2 Mbps)	12.0
>2048 kbps (2 Mbps)	2.1
DK/ NA	27.3
Total	**100.0**

** Base: Households in which the bandwidth of the dedicated connection would (definitely or probably) be upgraded in the next 12 months*

In most cases (31.9%), the bandwidth intended to be acquired is 128 kbps.

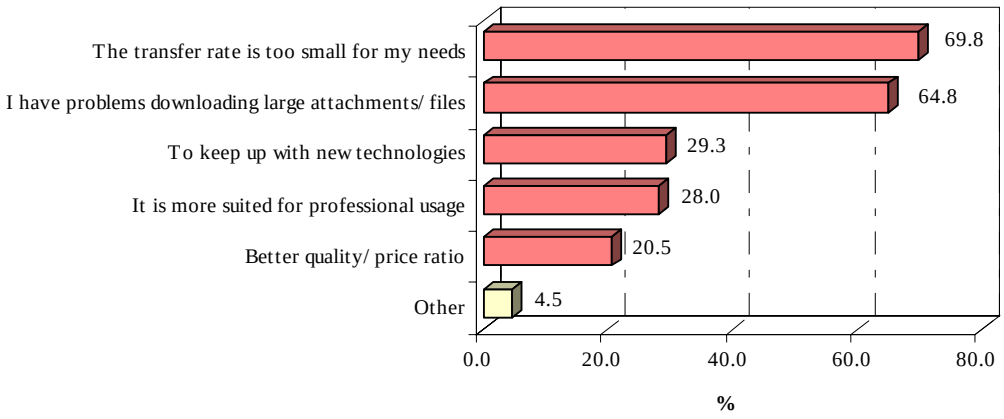
8.8.3. Reasons for Considering an Upgrade of the Current Bandwidth

Q57. What would be the reasons for intending to upgrade to this bandwidth in the next 12 months?

Reasons for Considering an Upgrade of the Current Bandwidth	**%* of households (base=31)**
The transfer rate is too small for my needs	69.8
I have problems downloading large attachments/ files	64.8
To keep up with new technologies	29.3
It is more suited for professional usage	28.0
Better quality/ price ratio	20.5
Other	4.5

**Base: Households in which the bandwidth of the dedicated connection would (definitely or probably) be upgraded in the next 12 months*
Multiple answer

Reasons for Considering an Upgrade of the Current Bandwidth



Most probably, the reasons for which Internet users consider a bandwidth upgrade are *the transfer rate they have at the moment is too small for their needs* (69.8%) and *the problems they have downloading large attachments/ files* (64.8%).

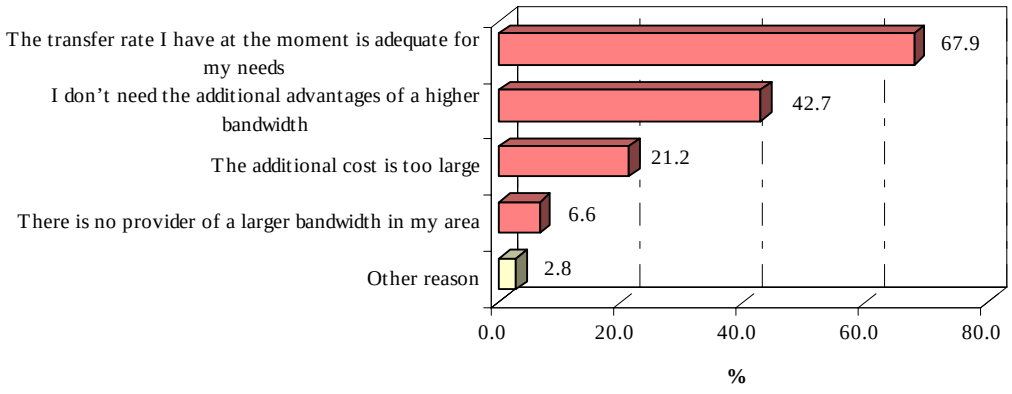
8.8.4. Reasons for NOT Considering an Upgrade of the Current Bandwidth

Q58. What would be the reasons for NOT intending to upgrade to a higher bandwidth in the next 12 months?

Reasons for NOT Considering an Upgrade of the Current Bandwidth	**%* of households (base=75)**
The transfer rate I have at the moment is adequate for my needs	67.9
I don't need the additional advantages of a higher bandwidth	42.7
The additional cost is too large	21.2
There is no provider of a larger bandwidth in my area	6.6
Other reason	2.8

**Base: Households in which the bandwidth of the dedicated connection would (definitely or probably) not be upgraded in the next 12 months*
Multiple answer

Reasons for NOT Considering an Upgrade of the Current Bandwidth



Most important reason for not upgrading the bandwidth is *the adequate transfer rate they have at the moment, according to their needs* (67.9%). Another important reason for keeping the current bandwidth is the fact that *the additional advantages of a higher bandwidth are considered unnecessary* (42.7%).

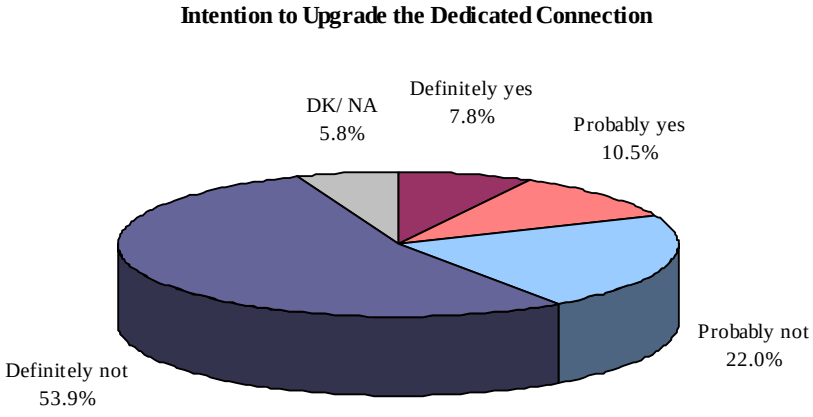
8.9. Dedicated Connection Upgrading

8.9.1. Intention to Upgrade the Dedicated Connection

Q59. How likely is for you to acquire other dedicated connection in the next 12 months?

Intention to Upgrade the Dedicated Connection	% of households (base=118)
Definitely yes	7.8
Probably yes	10.5
Probably not	22.0
Definitely not	53.9
DK/ NA	5.8
Total	**100.0**
Mean*	***1.70***

** Scale: 1 = definitely not, …, 4 = definitely yes*



As for dedicated connection upgrading, there is a small interest among the households with dedicated connections, in 75.9% of cases *another dedicated connection would (definitely or probably) not be acquired* in the next 12 months.

8.9.2. Type of Dedicated Connection Intended to be Acquired

Q60. What type of dedicated connection do you wish to acquire?

Type of Dedicated Connection Intended to be Acquired	Count*
Optical fiber	10
TV Cable	6
RomTelecom leased line (standard modem)	2
Radio	1
Other type of connection	1
Total	**20**

**Base: Households in which another type of dedicated connection would (definitely or probably) be acquired in the next 12 months*

8.9.3. Intended Bandwidth for the Dedicated Connection Intended to be Bought

Q61. What bandwidth do you want for this type of connection?

Intended Bandwidth for the Dedicated Connection Intended to be Bought	Count*
128 kbps	5
2048 kbps (2 Mbps)	4
256 kbps	2
512 kbps	1
1024 kbps	1
DK/ NA	7
Total	**20**

**Base: Households in which another type of dedicated connection would (definitely or probably) be acquired in the next 12 months*

8.9.4. Intended Usage of the Current Dedicated Connection in Case of Dedicated Connection Upgrading

Q62. What will you do with the dedicated connection/s you currently own?

Usage of the Current Dedicated Connections Together with the Dedicated Connection Intended to be Acquired	Count*
I will give it up	17
Don't know	3
Total	**20**

**Base: Households in which another type of dedicated connection would (definitely or probably) be acquired in the next 12 months*

8.9.5. Reasons for Considering Another Dedicated Connection

Q63. Which would be the reasons for intending to acquire this type of connection in the next 12 months?

Reasons for Considering Another Dedicated Connection	Count*
The transfer rate is too small for my needs	13
I have problems when downloading some attachments/ files of large dimensions	9
To keep up with the new technologies	9
It is more suited to professional usage	5
Total	**20**

**Base: Households in which another type of dedicated connection would (definitely or probably) be acquired in the next 12 months*
Multiple answer

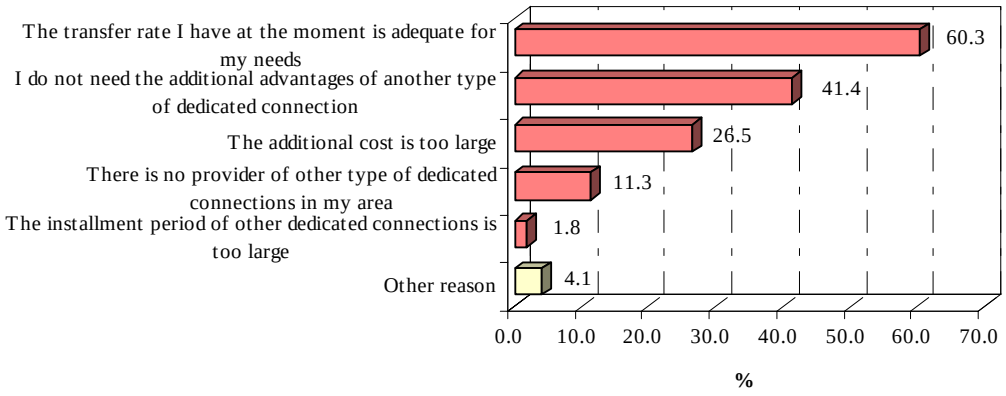
8.9.6. Reasons for NOT Considering Another Dedicated Connection

Q64. Which would be the reasons for NOT intending to acquire other type of dedicated connections in the next 12 months?

Reasons for NOT Considering Another Dedicated Connection	**%* of households (base=89)**
The transfer rate I have at the moment is adequate for my needs	60.3
I do not need the additional advantages of another type of dedicated connection	41.4
The additional cost is too large	26.5
There is no provider of other type of dedicated connections in my area	11.3
The installment period of other dedicated connections is too large	1.8
Other reason	4.1

**Base: Households in which another type of dedicated connection would (definitely or probably) not be acquired in the next 12 months*
Multiple answer

Reasons for NOT Considering an Upgrade of the Current Dedicated Connection



Main reason for not considering the change of the currently used dedicated connection is the fact that *the transfer rate own at the moment is adequate for the users' needs* (60.3%).

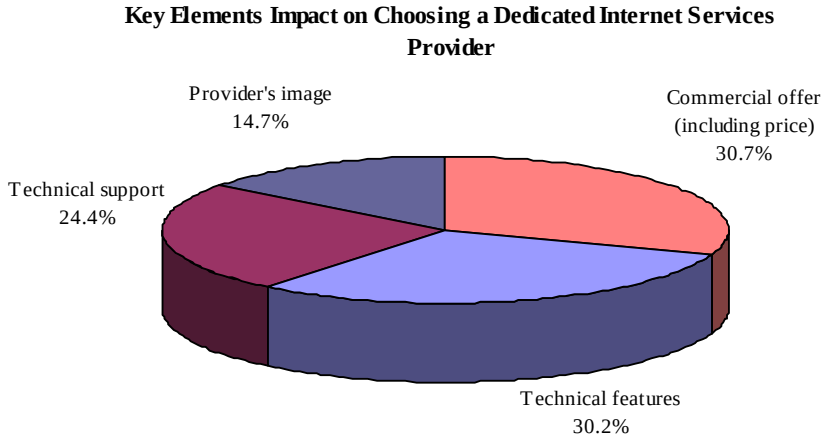
In 41.4% of cases, users consider that *they do not need the advantages of another type of dedicated connection.*

8.10. Dedicated Internet Services Providers Evaluation

8.10.1. Key Elements Impact on Choosing a Dedicated Internet Services Provider

Q68. When you choose a dedicated Internet provider, how important are each of the following aspects? Please split 100 points between the following elements depending on how important are each of them for you personally.

Key Elements Impact on Choosing a Dedicated Internet Services Provider	% of households (out of 100 points) (base=118)
Commercial offer (including price)	30.7
Technical features	30.2
Technical support	24.4
Provider's image	14.7
Total	**100.0**



As was the case for dial-up Internet services providers, *the commercial offer* (including price) and *the technical features* are the most important elements when choosing a dedicated Internet services provider (30.7% and 30.2%).

8.10.2. Benefits Sought in a Dedicated Internet Services Provider

Q65. Now I will show you a list with the main attributes of a dedicated Internet provider. Please choose from this list exactly 5 attributes which you personally consider the most important for a dedicated Internet provider.
Q66. Now I would like you to rate all the attributes from this card for the dedicated Internet provider/s you have. You have the following options: 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.
Q67. How satisfied are you, in general, with the dedicated services offered by the Internet provider(s) you have? You have the following options: 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.

Benefits Sought in a Dedicated Internet Services Provider	Stated Importance % * (base=118)	Derived Importance**
ENTRY TICKETS		
Data transfer rate	75.7	0.48
The services' tariffs	61.8	0.13
The price of the equipment	44.8	0.30
KEY DRIVERS		
The quality of the customer service	50.3	0.66
Data confidentiality	36.1	0.60
VALUE - ADDED		
Professional installation and configuration	35.0	0.70
Solving promptly the network problems	33.2	0.68
Average delay time within the network– access time to the interest sites	32.9	0.55
Technical support quality	31.4	0.64
Provider's reputation/ Experienced provider	28.9	0.66
Uptime (Network availability)	26.9	0.60
The diversity of the connection technologies offered	18.9	0.56
LOW YIELDS		
Bill plans diversity	12.1	0.32
Upgrading to superior services	7.8	0.42

** Multiple answer (exactly 5 options)*
*** Correlation with overall satisfaction*

- As compared to the dial-up providers market, for dedicated Internet services providers, the ***entry tickets*** are:
  - *The services' tariffs*
  - *Data transfer rate*
  - *The price of the equipment*

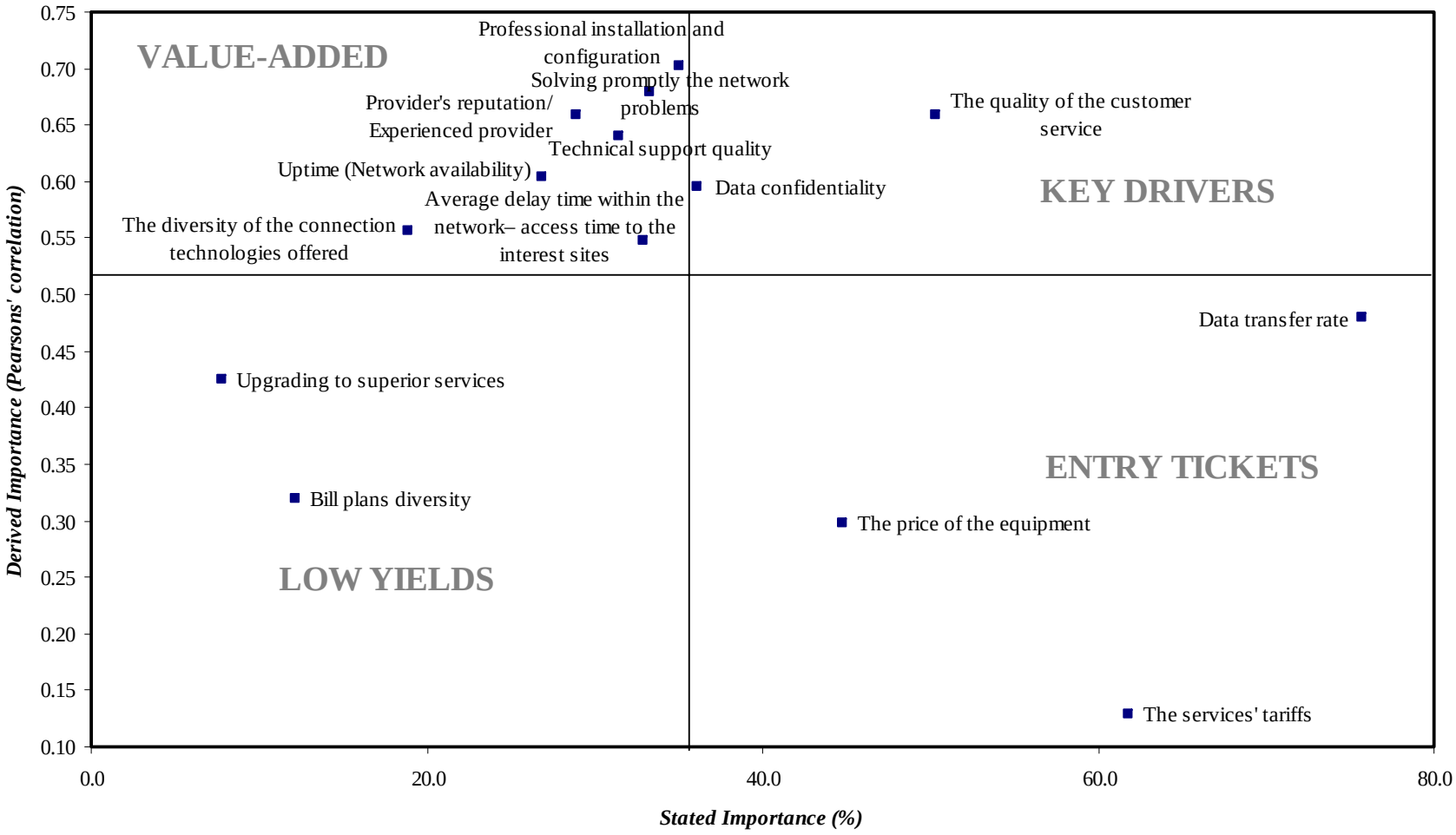
We can see that the prices of the services (*the services' tariffs* and *the price of the equipment*) are still *entry tickets* (as was the case for dial-up Internet services providers), but for dedicated providers another entry ticket is *the data transfer rate.*

- The ***key drivers*** for dedicated Internet services providers are:
  - ❖ The quality of the customer service
  - ❖ Data confidentiality

- Regarding the ***value added*** section, there is a great opportunity for differentiation because of the large number of attributes in this area:
  - ❖ The diversity of the connection technologies offered
  - ❖ Provider's reputation/ Experienced provider
  - ❖ Uptime (Network availability)
  - ❖ Technical support quality
  - ❖ Solving promptly the network problems
  - ❖ Professional installation and configuration
  - ❖ Average delay time within the network – access time to the interested sites

- The ***low yields*** attributes for a dedicated Internet services provider are:
  - ❖ Bill plan diversity
  - ❖ Upgrading to superior services

Dual Importance Grid



8.10.3. Providers Evaluation

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Q67. How satisfied are you, in general, with the dedicated services offered by the Internet provider(s) you have? You have the following options: 1 = very dissatisfied, 2 = dissatisfied, 3 = rather dissatisfied, 4 = neither satisfied, nor dissatisfied, 5 = rather satisfied, 6 = satisfied, 7 = very satisfied, 9 = doesn't apply.

Providers Evaluation	**RDS (base=56)**	**Astral Telecom (base=35)**
	Mean*	
Overall satisfaction	**x**	**x**
The quality of the services	**x**	**x**
ENTRY TICKETS		
Data transfer rate	**x**	**x**
The services' tariffs	**x**	**x**
The price of the equipment	**x**	**x**
KEY DRIVERS		
The quality of the customer service	**x**	**x**
Data confidentiality	**x**	**x**
VALUE - ADDED		
Professional installation and configuration	**x**	**x**
Solving promptly the network problems	**x**	**x**
Average delay time within the network– access time to the interest sites	**x**	**x**
Technical support quality	**x**	**x**
Provider's reputation/ Experienced provider	**x**	**x**
Uptime (Network availability)	**x**	**x**
The diversity of the connection technologies offered	**x**	**x**
LOW YIELDS		
Bill plans diversity	**x**	**x**
Upgrading to superior services	**x**	**x**

** Scale: 1 = very dissatisfied, …, 7 = very satisfied*

The analysis revealed that the dedicated users are more satisfied with the Internet providers they use, as compared to the dial-up users and their providers.

** There were excluded confidential data regarding the comparative Internet providers evaluation*

As for the *data transfer rate*, which in the case of dedicated Internet services becomes an ***entry ticket***, users are significantly more satisfied, as compared to the dial-up Internet services providers.

9. SWITCHING PATTERNS[8]

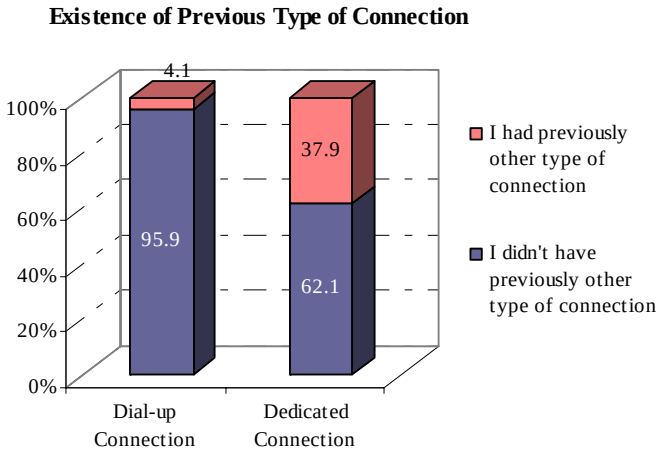
9.1. Switching Behavior in Terms of Type of Connection

9.1.1. Existence of Previous Type of Connection

Q69. Did you previously have other type of connection?

Existence of Previous Type of Connection	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	% of households		
I didn't previously have other type of connection	95.9(2)	62.1(1)	89.0
I previously had other type of connection	4.1(2)	37.9(1)	11.0
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



For those who currently use a dial-up connection it is significantly more likely that this is the first connection used, as compared to those who use a dedicated connection (95.9% vs. 62.1%).

[8] *Unweighted base*
The analysis in this chapter was done on the households in which there is at least one Home Internet User

9.1.2. Type of Connection Renounced to

Q70. What types of connection did you have?

Type of Connection Renounced to	Dial-up Users(1) (base=19)*	Dedicated Users(2) (base=45)	Total (base=63)
	%** of households		
DIAL-UP CONNECTIONS	**64.1(2)**	**93.3(1)**	**85.7**
Fixed phone line	26.6(2)	80.4(1)	65.2
GSM/ CDMA	25.9	15.5	18.8
ISDN	11.7(2)	0.0(1)	3.5
DEDICATED CONNECTIONS	**21.9(2)**	**3.7(1)**	**11.5**
TV cable	18.1(2)	0.0	5.4
RomTelecom leased line (standard modem)	3.8	3.7	3.8
DK/ NA	19.5	5.3	8.4

** Treat data with caution due to the small base*
*** Base: Households in which the Internet connection was changed*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Most of home Internet users, who currently have a dedicated connection, previously used a *dial-up fixed phone line* (80.4%).

9.1.3. Main Reason for Switching the Type of Connection the Last Time

Q71. What is the main reason for changing/giving up this type of connection last time?

Main Reason for Switching the Type of Connection the Last Time	Dial-up Users(1) (base=19)*	Dedicated Users(2) (base=45)	Total (base=63)
	%** of households		
The transfer rate was too small for my needs	12.7(2)	39.6(1)	30.8
The line was busy too often when I called	19.4	30.1	27.2
The cost of telephony service was too big (for dial-up)	11.0	10.1	10.5
The connection offered was of poor quality as compared to the new technical solutions on the market	9.3	9.1	9.3
The cost of Internet subscription was too big	22.0(2)	0.0	6.6
The connection was frequently interrupted	0.0	5.5	4.0
It did not suit well to professional usage	0.0	3.9	2.8
I had problems downloading large attachments/ files	4.5	0.0	1.3
Other reason	21.0(2)	1.7(1)	7.5
Total	**100.0**	**100.0**	**100.0**

** Treat data with caution due to the small base*
*** Base: Households in which the Internet connection was changed*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

When switching to a dedicated connection, the main reasons were the fact that *the old transfer rate was too small for the users needs* (39.0%) and also, *the line was busy too often* when trying to establish a connection (30.1%).

9.2. Switching Behavior in Terms of Internet Services Provider

9.2.1. Existence of Previous Internet Services Providers

Q72. How many times have you changed the Internet provider/s?

Existence of Previous Internet Services Providers	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	% of households		
I haven't changed the Internet provider	86.3(2)	62.9(1)	81.7
I have changed the Internet provider	13.7(2)	37.1(1)	18.3
Once	*9.1(2)*	*33.3(1)*	*13.9*
Twice	*3.1*	*1.8*	*2.7*
3 times or more	*1.5*	*2.0*	*1.6*
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

The large majority of both dial-up (86.3%) and dedicated users (62.9%) never changed the Internet services provider in the past.

9.2.2. Main Reason for Switching the Internet Services Provider the Last Time

Q73. Thinking of the last change of a provider, please tell me what was the main reason for making this change.

Main Reason for Switching the Internet Services Provider the Last Time	**Dial-up Users(1) (base=57)**	**Dedicated Users(2) (base=42)**	**Total (base=96)**
	%* of households		
Unsatisfactory transfer rate	16.5(2)	56.4(1)	32.1
Too large tariffs as compared to the competition	31.7	20.0	27.7
Inadequate technical support	14.2	11.4	12.8
Lack of reliability of the connection offered	11.4	3.1	8.3
A new free offer	6.7	0.0	4.1
The provider did not offer the type of connection I needed	1.2	9.0	3.8
Lack of seriousness	1.1	0.0	0.7
Other reason	17.2(2)	0.0	10.5
Total	**100.0**	**100.0**	**100.0**

** Base: Households in which the Internet provider was changed*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Of dial-up connections users who changed the Internet services provider at least once, 31.7% made this decision because the previous provider had *too large tariffs as compared to the competitors*, 16.5% because the *unsatisfactory transfer rate* and 14.2% because the *inadequate technical support*.

Regarding the dedicated connection users, they made the decision to change the previously used Internet services provider, because of the *unsatisfactory transfer rate* (56.4%) and also, because of the *too large tariffs as compared to the competition* (20.0%).

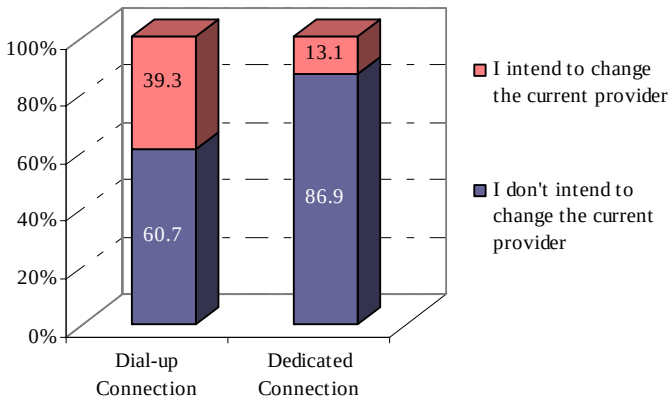
9.2.3. Intention to Change the Current Internet Services Provider in the Next 6 Months

Q74. Do you intend to change the Internet provider/s in the next 6 months?

Intention to Change the Current Internet Services Provider in the Next 6 Months	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	% of households		
I don't intend to change the current provider	60.7(2)	86.9(1)	66.1
I intend to change the current provider	39.3(2)	13.1(1)	33.9
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Intention to Change the Current Internet Services Provider in the Next 6 Months



The large majority of home Internet users *do not intent to change the current Internet services provider* (86.9% of those who used dedicated connections as compared to a significantly smaller percentage of those who use dial-up connection – 60.7%).

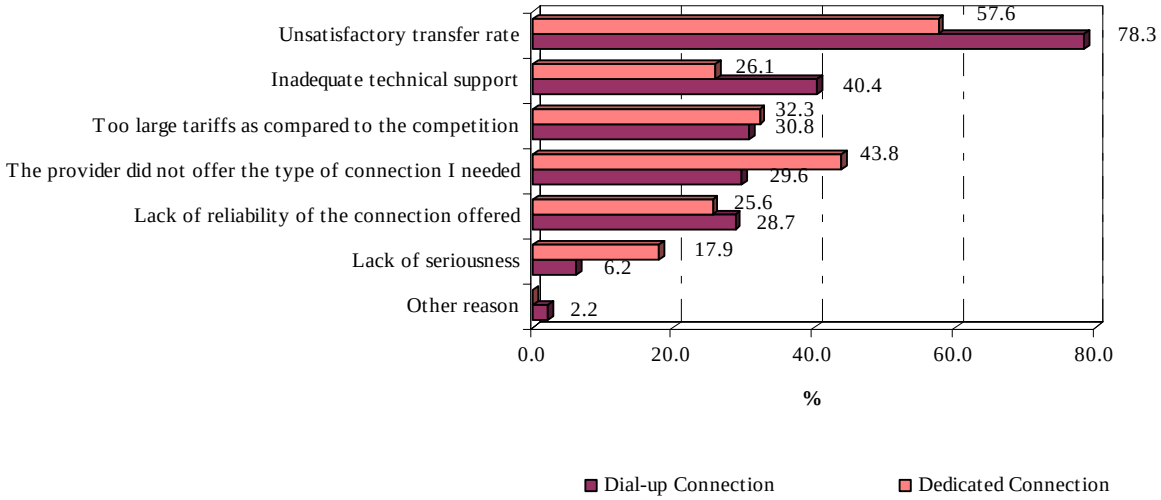
9.2.4. Reasons for Intending to Change the Current Internet Services Provider in the Next 6 Months

Q75. Which would be the reasons for intending to change/ give up the Internet provider/s in the next 6 months?

Reasons for Intending to Change the Current Internet Services Provider in the Next 6 Months	Dial-up Users (base=153)	Dedicated Users (base=15)*	Total (base=163)
	%** of households		
Unsatisfactory transfer rate	78.3	57.6	76.5
Inadequate technical support	40.4	26.1	40.2
Too large tariffs as compared to the competition	30.8	32.3	30.9
The provider did not offer the type of connection I needed	29.6	43.8	30.4
Lack of reliability of the connection offered	28.7	25.6	28.4
Lack of seriousness	6.2	17.9	7.3
Other reason	2.2	0.0	2.0

** Treat data with caution due to the small base*
*** Base: Households in which the Internet provider is to be changed in the next 6 months*
Multiple answer

Reasons for Intending to Change the Current Internet Services Provider in the Next 6 Months



In the case of dial-up connections users, the main reason for intending to change the currently used Internet services provider is *the unsatisfactory transfer rate* (78.3%). Other reason for making the switch is *the inadequate technical support* (40.4%).

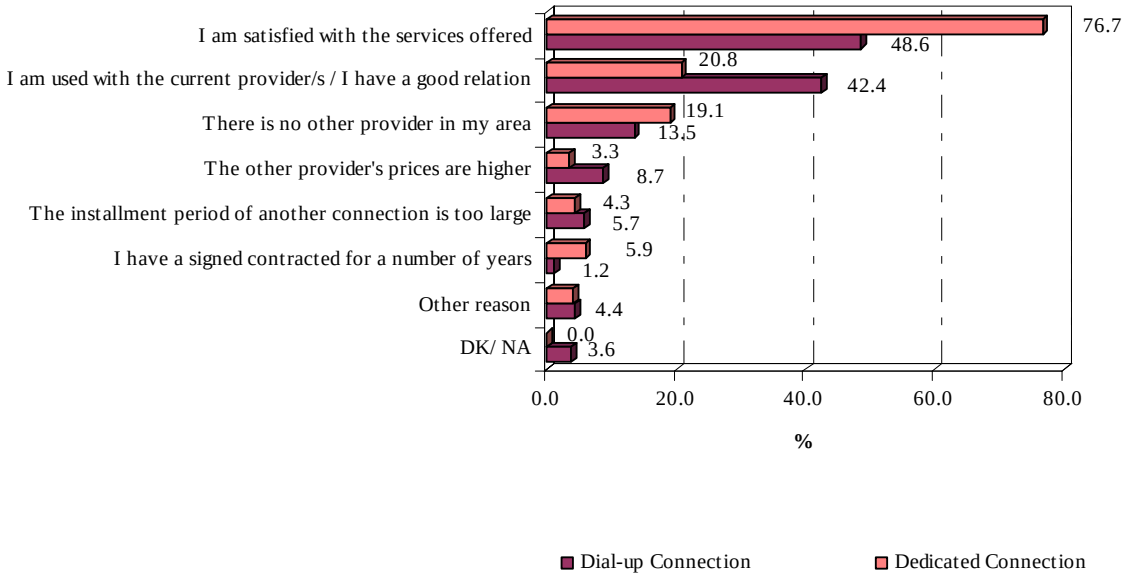
9.2.5. Reasons for NOT Intending to Change the Current Internet Services Provider in the Next 6 Months

Q76. Which would be the reasons for NOT intending to change/ give up the Internet provider/s you currently have?

Reasons for NOT Intending to Change the Current Internet Services Provider in the Next 6 Months	Dial-up Users(1) (base=256)	Dedicated Users(2) (base=103)	Total (base=353)
	%* of households		
I am satisfied with the services offered	48.6(2)	76.7(1)	55.9
I am used with the current provider/s / I have a good relation	42.4(2)	20.8(1)	37.0
There is no other provider in my area	13.5	19.1	14.6
The other provider's prices are higher	8.7	3.3	6.7
The installment period of another connection is too large	5.7	4.3	5.4
I have a signed contracted for a number of years	1.2(2)	5.9(1)	2.5
Other reason	4.4	4.0	4.4
DK/ NA	3.6	0.0	2.7

** Base: Households in which the Internet provider is not to be changed in the next 6 months*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Reasons for NOT Intending to Change the Current Internet Services Provider in the Next 6 Months



Most important reasons for not intending to change the dial-up Internet services provider in the next 6 months are *the satisfaction with the services offered by the currently used provider* (48.6%) and the fact that the *users are used with the current providers/ they have a good relation* (42.4%).

As for dedicated connections providers, most important reason for keeping the currently used provider is *the satisfaction with the services offered* (76.7%).

Having *a signed contract for a number of years* is mentioned as a reason to keep the current Internet services provider by a significantly larger percentage of dedicated connections users as compared to those who use a dial-up connection.

10. DECISIONAL PROCESS[9]

10.1. Main Internet Connection Used

Q18. What is the main type of Internet connection you use?

Main Internet Connection Used	% (base=118)
DIAL-UP CONNECTIONS	**79.9**
Fixed phone line	72.6
GSM/ CDMA/ GPRS	7.0
ISDN	0.3
DEDICATED CONNECTIONS	**20.1**
TV Cable	15.9
Optical fiber	2.6
Radio	0.8
RomTelecom leased line (standard modem)	0.4
RomTelecom leased line (XDSL: ADSL, SDSL, HDSL etc.)	0.2
Satellite/ V-Sat	0.1
Total	**100.0**

The majority of home Internet users have a dial-up connection (79.9%). Only 20.1% of them have a dedicated connection.

[9] *Unweighted base*
The analysis in this chapter was done on the Home Internet Users.

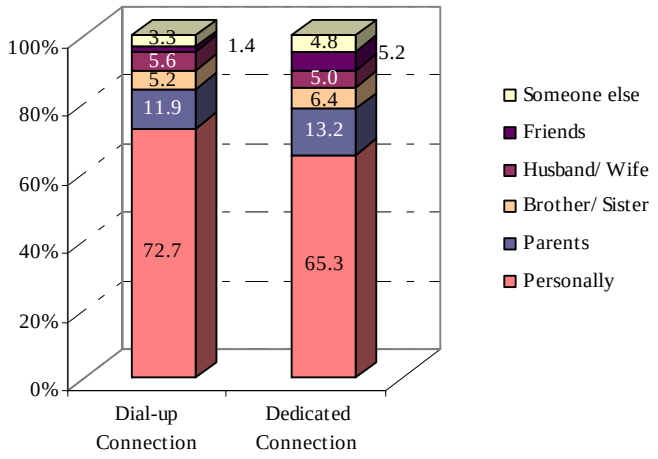
10.1.1. Decider of the Main Internet Connection Used

Q20. Who made the decision to buy this type of connection?

Decider of the Main Internet Connection Used	Dial-up Users(1) (base=402)	Dedicated Users(2) (base=114)	Total (base=516)
	%		
Personally	72.7	65.3	71.2
Parents	11.9	13.2	12.1
Brother/ Sister	5.2	6.4	5.5
Husband/ Wife	5.6	5.0	5.5
Friends	1.4(2)	5.2(1)	2.1
Someone else	3.3	4.8	3.6
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Decider of the Main Internet Connection Used



In most cases the decision to acquire a certain type of Internet connection was made *personally* both by *dial-up users* (72.7%) and by *dedicated users* (65.3%).

In the case of dedicated connections, *friends* are more likely to make the decision to acquire this connection rather than in the case of dial-up connection (5.2% vs. 1.4%).

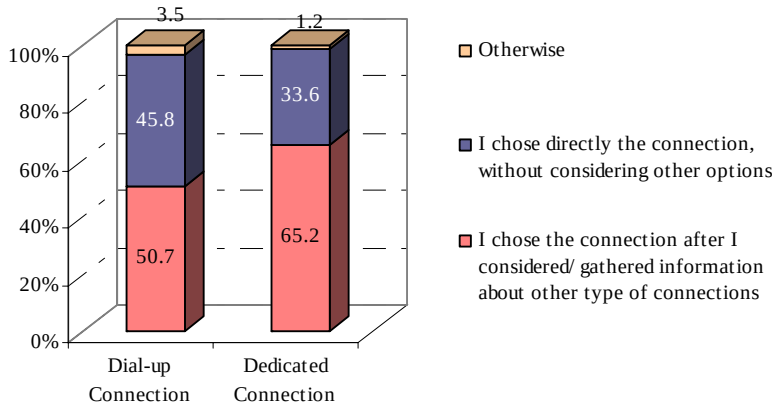
10.1.2. Way of Choosing the Type of Connection Used

Q21. Which of the following statements describes best the way you chose the type of connection?

Way of Choosing the Type of Connection Used	Dial-up Users(1) (base=296)	Dedicated Users(2) (base=76)	Total (base=372)
	%*		
I chose the connection after I considered/ gathered information about other type of connections	50.7(2)	65.2(1)	53.4
I chose directly the connection, without considering other options	45.8	33.6	43.5
Otherwise	3.5	1.2	3.1
Total	**100.0**	**100.0**	**100.0**

** Base: Persons who made the decision to buy the Internet connection*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Way of Choosing the Type of Connection Used



When choosing a dedicated connection, most Internet users spend time *gathering information about other type of connections* (65.2%). A significantly larger percentage of dedicated Internet connections users gathered information about other types of connections before acquiring one, as compared to those who chose a dial-up connection (65.2% vs. 50.7%).

10.1.3. Reasons for Choosing the Type of Connection Used

Q22. Which would be the reasons for choosing this type of connection?

Reasons for Choosing the Type of Connection Used	Dial-up Users(1) (base=296)	Dedicated Users(2) (base=76)	Total (base=372)
	%*		
It had a reasonable price	54.7	53.4	54.5
It was recommended to me by a friend/ relative/ acquaintances	27.6(2)	40.4(1)	29.9
There was no other type of connection available in my area	27.8(2)	16.3(1)	25.7
It was fast enough for my needs	15.9(2)	51.9(1)	22.5
It was more suited for professional use	3.1(2)	21.5(1)	6.5
The installment period of another connection was large	6.2	5.9	6.2
Other	3.9	4.4	4.0
DK/ NA	2.6	7.4	3.5

** Base: Persons who made the decision to buy the Internet connection*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Most important when choosing a type of Internet connection is the price (*it had a reasonable price*) (54.5%).

As compared to dedicated connections, the dial-up connections are more likely to be chosen because *there was no other type of connection available in that area* (27.8% vs. 16.3%).

Regarding the dedicated connections, they are more likely to be chosen because they *were fast enough for the users' needs* (51.9% vs. 15.9%), *were recommended by friends/ relatives/ acquaintances* (40.4% vs. 27.6%) and they *are more suited for professional use* (21.5% vs. 3.1%) as compared to the dial-up connections.

10.2. Main Internet Provider Used

Q18. What is the main type of Internet connection you use?/ Q19. What Internet providers do you have for each type of connection you use?

Main Internet Provider Used	Dial-up Users(1) (base=402)	Dedicated Users(2) (base=114)	Total (base=516)
	%*		
Xnet	69.9	0.0	55.8
RDS	4.5(2)	51.8(1)	14.0
Astral Telecom	3.1(2)	26.1(1)	7.7
Easy Net	8.3(2)	0.0	6.6
Artelecom	4.2	0.8	3.6
Zapp	3.7(2)	0.0	2.9
PC Net	1.9	0.5	1.6
Idilis	1.5	0.0	1.2
FX - Internet	0.8	2.3	1.1
Assist	0.0	4.4(1)	0.9
Terra Sat	0.4	0.5	0.4
Other	1.6(2)	13.6(1)	4.1
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

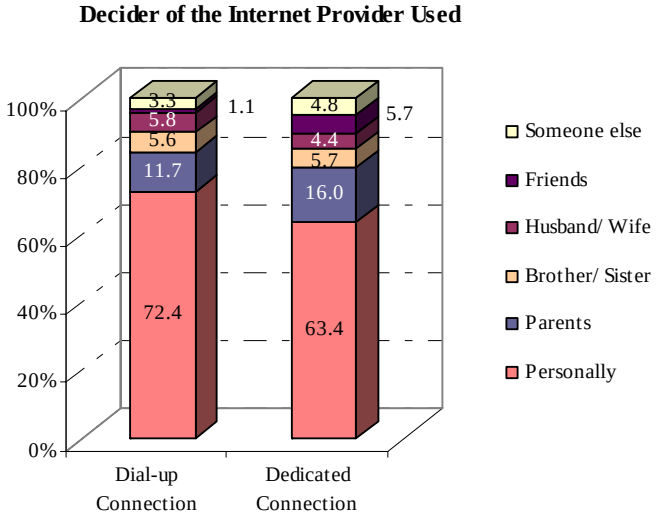
Main dial-up Internet services provider is *Xnet* (69.9%), while for dedicated connections, main providers are *RDS* (51.8%) and *Astral Telecom* (26.1%).

10.2.1. Decider of the Internet Provider Used

Q23. Who made the decision to connect to this provider?

Decider of the Internet Provider Used	**Dial-up Users(1) (base=402)**	**Dedicated Users(2) (base=114)**	**Total (base=516)**
	%*		
Personally	72.4	63.4	70.6
Parents	11.7	16.0	12.5
Brother/ Sister	5.6	5.7	5.6
Husband/ Wife	5.8	4.4	5.6
Friends	1.1(2)	5.7(1)	2.1
Someone else	3.3	4.8	3.6
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



Both dial-up users and dedicated users decided *personally* the Internet provider for their connection (72.4% of dial-up users and 63.4% of dedicated users).

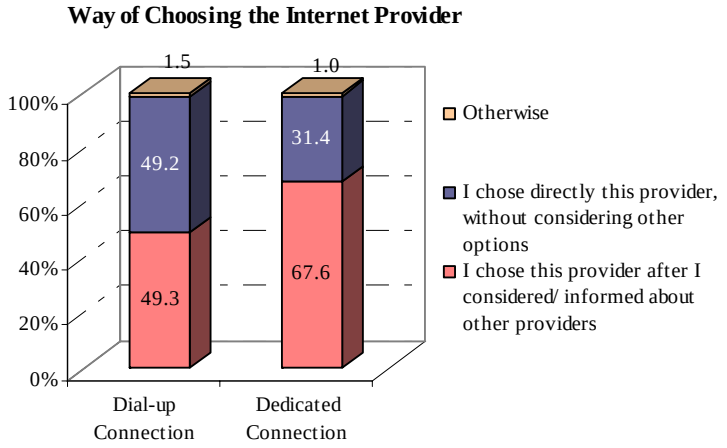
Also, *friends* are more likely to decide the Internet provider for dedicated connections rather than for dial-up connections (5.7% vs. 1.1%).

10.2.2. Way of Choosing the Internet Provider

Q24. Which of the following statements describes best the way you chose this provider?

Way of Choosing the Internet Provider	Dial-up Users(1) (base=294)	Dedicated Users(2) (base=74)	Total (base=368)
	%*		
I chose this provider after I considered/ gathered information about other providers	49.3(2)	67.6(1)	52.6
I chose directly this provider, without considering other options	49.2(2)	31.4(1)	46.0
Otherwise	1.5	1.0	1.4
Total	**100.0**	**100.0**	**100.0**

** Base: Persons who made the decision to connect to the provider*
Statistical significant differences between percents (1, 2) (level of confidence 95%)



There is a significantly larger percentage of dedicated connections users who chose the Internet services provider by previously *gathering information about other providers*, as compared to those who use a dial-up connection (67.6% vs. 49.3%).

Q24. Which of the following statements describes best the way you chose this provider?

Way of Choosing the Internet Provider	Main Internet Provider Used					Total (base=368)
	Xnet(1) (base=201)	RDS(2) (base=54)	Astral Telecom(3) (base=34)	Easy Net(4) (base=27)	Other(5) (base=52)	
	%*					
I chose this provider after I considered/ informed about other providers	44.3(2,5)	73.8(1)	56.2	60.0	62.3(1)	52.6
I chose directly this provider, without considering other options	53.8(2,5)	26.2(1)	41.7	40.0	36.6(1)	46.0
Otherwise	1.8	0.0	2.1	0.0	1.1	1.4
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Base: Persons who made the decision to connect to the provider*
Statistical significant differences between percents (1, 2, 3, 4, 5) (level of confidence 95%)

It is most likely that RDS was chosen as Internet services provider after considering/ informing about other providers (73.8%).

10.2.3. Reasons for Choosing the Internet Provider

Q25. Which would be the reasons for choosing this provider?

Reasons for Choosing the Internet Provider	Dial-up Users(1) (base=294)	Dedicated Users(2) (base=74)	Total (base=368)
	%*		
It has reasonable prices	40.5	42.7	40.9
It was a well known provider	29.6	35.6	30.7
It was recommended to me by a friend/ relative/ acquaintance	25.2(2)	39.4(1)	27.7
There were no other providers in my area	26.2	28.4	26.6
The quality of the distribution	5.9(2)	29.1(1)	10.1
Promotional offers	6.9	10.6	7.5
It offered connections more suited for professional use	2.9(2)	15.5(1)	5.2
Other	2.8	3.9	3.0
DK/ NA	2.0	5.1	2.6

** Base: Persons who made the decision to connect to the provider*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Main reasons for choosing both a dial-up provider or a dedicated provider is *the reasonable price* (40.5% and 42.7%).

A dial-up Internet services provider is also chosen because *it is a well known provider* (29.6%), *it was the only provider in the area* (26.2%) or *it was recommended by a friend/ relative/ acquaintance* (25.2%).

Dedicated connections providers were chosen because they *were recommended by a friend/ relative/ acquaintance* (39.4%), *they are well known providers* (35.6%), *the quality of the distribution* (29.1%) and *the lack of other providers in the area* (28.4%).

Q25. Which would be the reasons for choosing this provider?

Reasons for Choosing the Internet Provider	Main Internet Provider Used					Total (base=368)
	Xnet(1) (base=201)	RDS(2) (base=54)	Astral Telecom(3) (base=34)	Easy Net(4) (base=27)	Other(5) (base=52)	
	%*					
It has reasonable prices	44.5(3)	41.1(3)	15.7(1,2,5)	27.0	46.2(3)	40.9
It was a well known provider	27.9(2)	44.7(1)	35.3	27.4	28.1	30.7
It was recommended to me by a friend/ relative/ acquaintance	22.9(3,5)	32.0	46.5(1,4)	20.9(3)	36.4(1)	27.7
There were no other providers in my area	28.4	26.7	31.3	27.1	16.0	26.6
The quality of the distribution	2.9(2,3,5)	34.7(1,4,5)	18.4(1)	7.7(2)	13.5(1,2)	10.1
Promotional offers	7.2	12.9	8.3	0.0	6.8	7.5
It offered connections more suited for professional use	2.1(2,5)	13.5(1)	6.7	4.0	9.7(1)	5.2
Other	3.0	3.8	5.5	3.6	0.0	3.0
DK/ NA	0.8	0.0)	3.1	11.7	8.1	2.6

** Base: Persons who made the decision to connect to the provider*
Multiple answer
Statistical significant differences between percents (1, 2, 3, 4, 5) (level of confidence 95%)

Xnet and RDS are the Internet services providers perceived as *having a reasonable price* (44.5% and 41.1%) while RDS is also perceived as *a well known Internet service provider* (44.7%). Astral Telecom is the main Internet services provider *recommended by friends/ relatives/ acquaintances* (46.5%).

Xnet is preferred as Internet services provider because *it has reasonable prices* (44.5%), *it is the only provider in the area* (28.4%), *it is a well known provider* (27.9%) or *it was recommended by a friend/ relative/ acquaintances* (22.9%).

11. RESPONDENTS PROFILE[10]

11.1. Household's Demographics

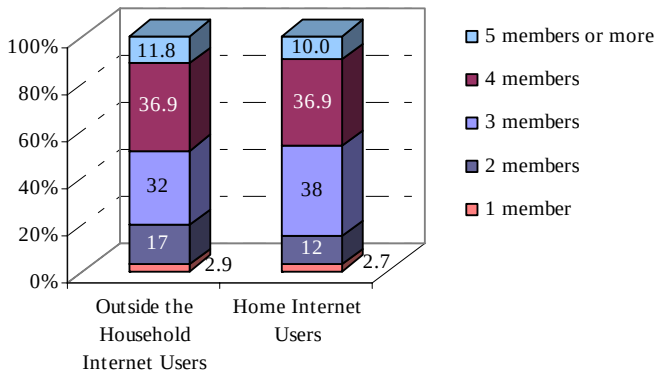
11.1.1. Breakdown by Number of Members within the Household

D1. How many members are there in your household, including yourself?

Breakdown by Number of Members within the Household	Outside the Household Internet Users[11](1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%		
1 member	2.9	2.7	2.8
2 members	16.5(2)	12.0(1)	14.8
3 members	31.9(2)	38.4(1)	34.3
4 members	36.9	36.9	36.9
5 members or more	11.8	10.0	11.1
Total	**100.0**	**100.0**	**100.0**
MEAN	***3.33***	***3.36***	***3.34***

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Number of Members within the Household



[10] *Unweighted base*
[11] *Refers to Internet users who don't have Internet at home*

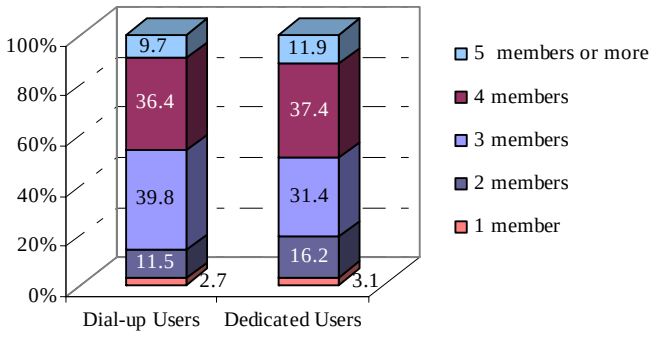
68.8% of the households in which members use the Internet outside the household and 75.3% of the households with home Internet access have *3 or 4 members*.

D1. How many members are there in your household, including yourself?

Breakdown by Number of Members within the Household	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
1 member	2.7	3.1	2.7
2 members	11.5	16.2	12.0
3 members	39.8	31.4	38.4
4 members	36.4	37.4	36.9
5 members or more	9.7	11.9	10.0
Total	**100.0**	**100.0**	**100.0**
Mean	***3.35***	***3.37***	***3.36***

** Base: Home Internet users*

Breakdown by Number of Members within the Household



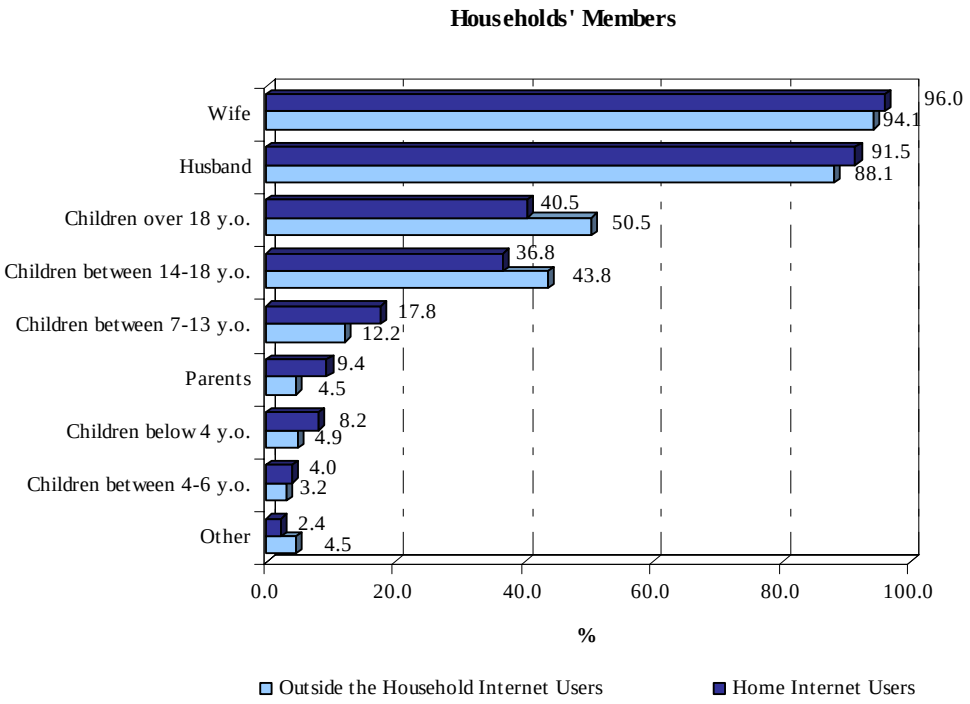
76.2% of dial-up users and 68.8% of dedicated users live in households of *3 or 4 members*.

11.1.2. Households' Members

D2. What members are in your household?

Households' Members	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
Wife	94.1	96.0	94.8
Husband	88.1	91.5	89.3
Children over 18 y.o.	50.5(2)	40.5(1)	46.8
Children between 14-18 y.o.	43.8(2)	36.8(1)	41.3
Children between 7-13 y.o.	12.2(2)	17.8(1)	14.2
Parents	4.5(2)	9.4(1)	6.3
Children below 4 y.o.	4.9(2)	8.2(1)	6.1
Children between 4-6 y.o.	3.2	4.0	3.5
Other	4.5	2.4	3.7

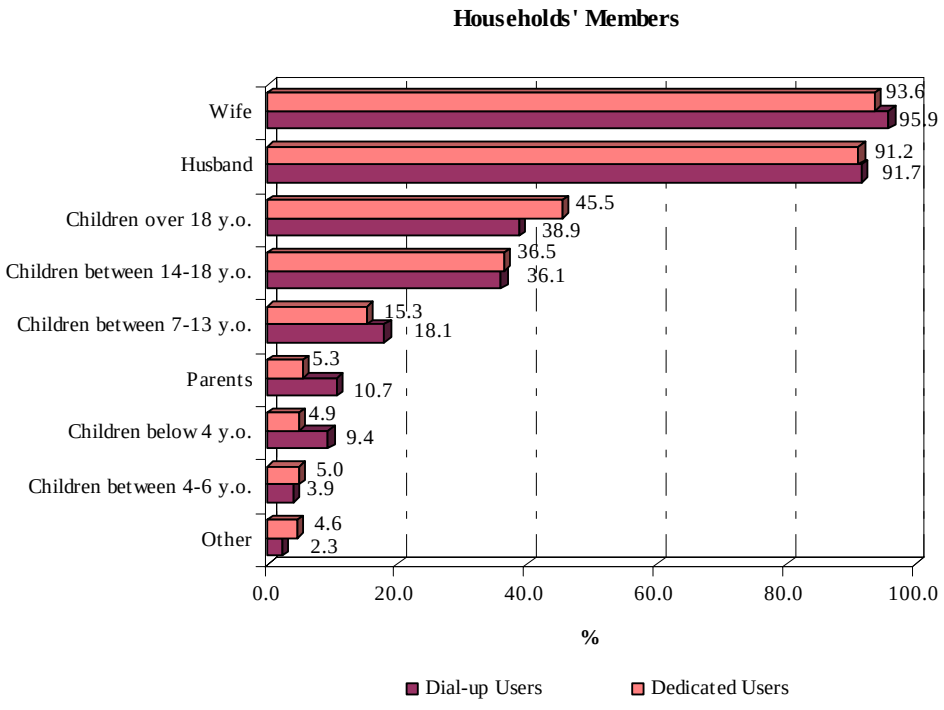
** Multiple answer*
Statistical significant differences between percents (1, 2) (level of confidence 95%)



D2. What members are in your household?

Households' Members	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
Wife	95.9	93.6	96.0
Husband	91.7	91.2	91.5
Children over 18 y.o.	38.9	45.5	40.5
Children between 14-18 y.o.	36.1	36.5	36.8
Children between 7-13 y.o.	18.1	15.3	17.8
Parents	10.7	5.3	9.4
Children below 4 y.o.	9.4	4.9	8.2
Children between 4-6 y.o.	3.9	5.0	4.0
Other	2.3	4.6	2.4

** Base: Home Internet users*
Multiple answer

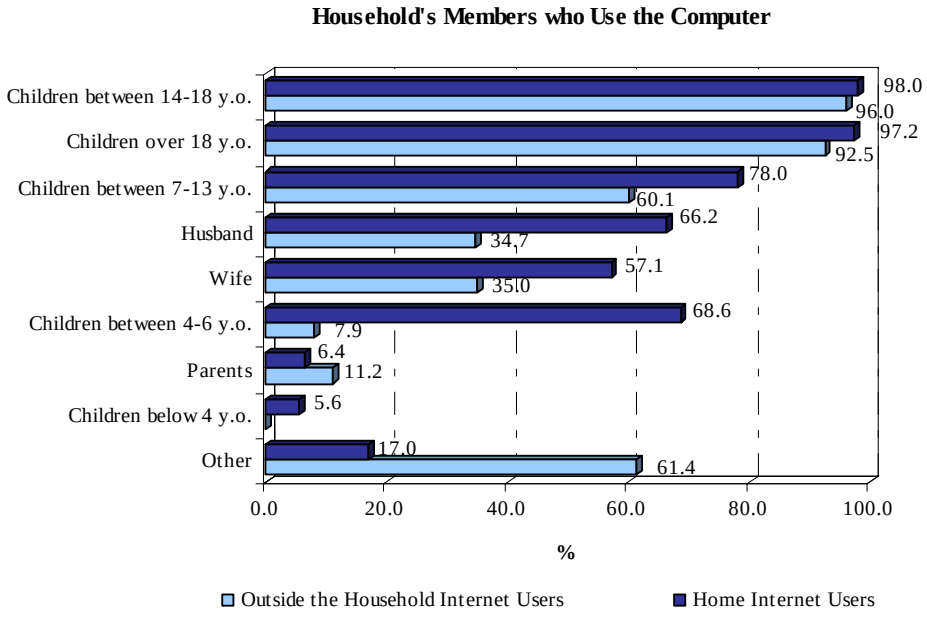


11.1.3. Household's Members who Use the Computer

D4. Which of your household members use the computer?

Household's Members who Use the Computer	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
Children between 14-18 y.o.	96.0	98.0	96.6
Children over 18 y.o.	92.5(2)	97.2(1)	94.0
Children between 7-13 y.o.	60.1(2)	78.0(1)	68.3
Husband	34.7(2)	66.2(1)	46.6
Wife	35(2)	57.1(1)	43.2
Children between 4-6 y.o.	7.9(2)	68.6(1)	33.3
Parents	11.2(2)	6.4(1)	8.5
Children below 4 y.o.	0.0	5.6	2.8
Other	61.4	17.0	51.0

** Percents were computed with respect to the households where that member exists*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

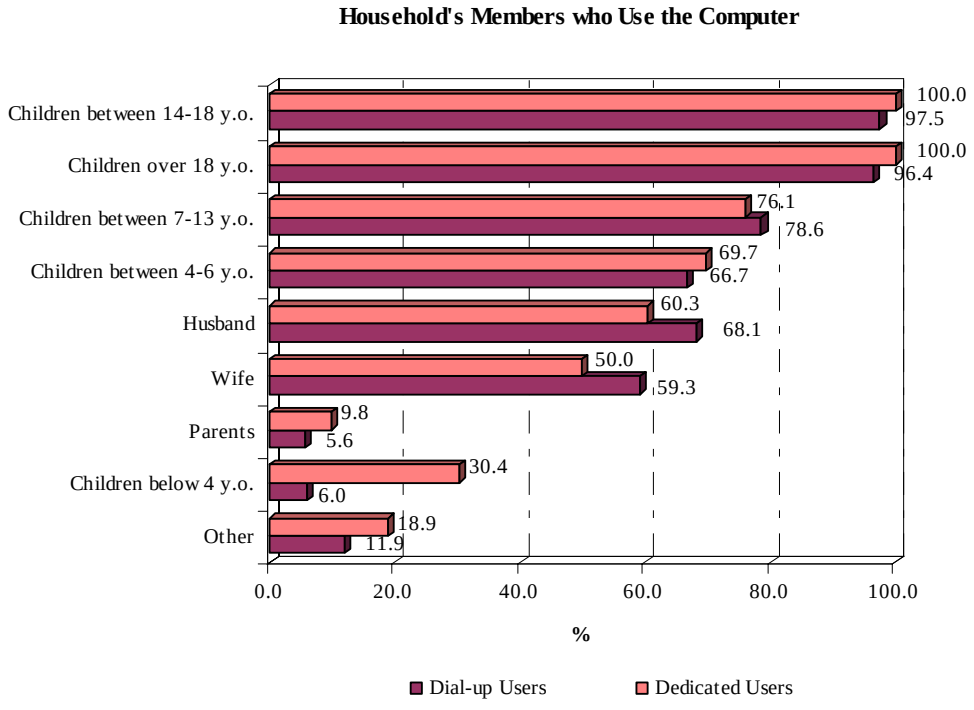


The large majority of *children over 18 years old* and *between 14 and 18 years old* are PC users, both at home and outside the household.

D4. Which of your household members use the computer?

Household's Members who Use the Computer	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
Children between 14-18 y.o.	97.5	100.0	98.0
Children over 18 y.o.	96.4(2)	100.0(1)	97.2
Children between 7-13 y.o.	78.6	76.1	78.0
Children between 4-6 y.o.	66.7	69.7	68.6
Husband	68.1	60.3	66.2
Wife	59.3	50.0	57.1
Parents	5.6	9.8	6.4
Children below 4 y.o.	6.0(2)	30.4(1)	5.6
Other	11.9	18.9	17.0

** Base: Home Internet users*
Percents were computed with respect to the households where that member exists
Multiple answer



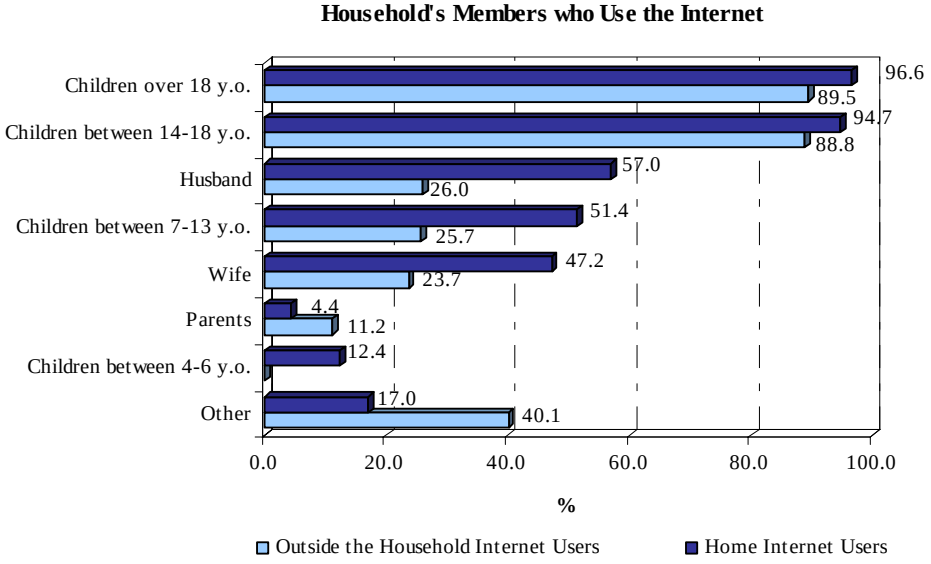
The majority of *children between 14 and 18 years old* and those *over 18* use the computer.

11.1.4. Household's Members who Use the Internet

D5. Which of your household members use the Internet?

Household's Members who Use the Internet	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%*		
Children over 18 y.o.	89.5(2)	96.6(1)	91.7
Children between 14-18 y.o.	88.8(2)	94.7(1)	90.7
Husband	26.0(2)	57.0(1)	37.7
Children between 7-13 y.o.	25.7(2)	51.4(1)	37.5
Wife	23.7(2)	47.2(1)	32.5
Parents	11.2(2)	4.4(1)	7.5
Children between 4-6 y.o.	0.0	12.4	5.2
Other	40.1	17.0	34.7

** Percents were computed with respect to the households where that member exists*
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)

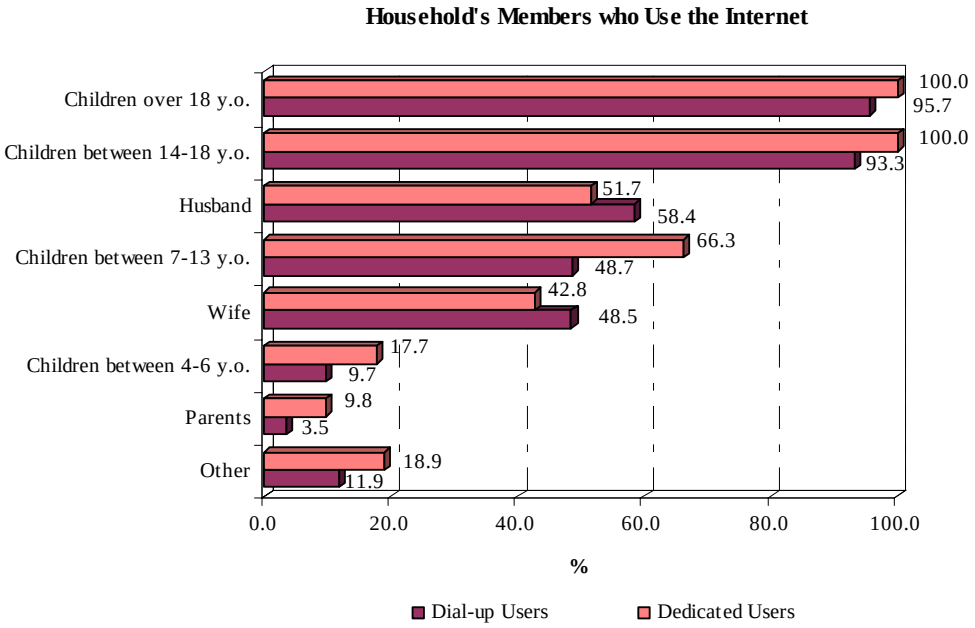


The large majority of *the children over 18* and *between 14 and 18 years old* use the Internet at home, and they are more likely to use the Internet at home rather than outside the household.

D5. Which of your household members use the Internet?

Household's Members who Use the Internet	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	%*		
Children over 18 y.o.	95.7(2)	100.0(1)	96.6
Children between 14-18 y.o.	93.3(2)	100.0(1)	94.7
Husband	58.4	51.7	57.0
Children between 7-13 y.o.	48.7(2)	66.3(1)	51.4
Wife	48.5	42.8	47.2
Children between 4-6 y.o.	9.7(2)	17.7(1)	12.4
Parents	3.5(2)	9.8(1)	4.4
Other	11.9	18.9	17.0

** Base: Home Internet users*
Percents were computed with respect to the households where that member exists
Multiple answer
Statistical significant differences between percents (1, 2) (level of confidence 95%)



The majority of the *children over 18 years old* and those aged *between 14 and 18 years old* use the dial-up and dedicated connections. Also, they use the Internet connections similarly.

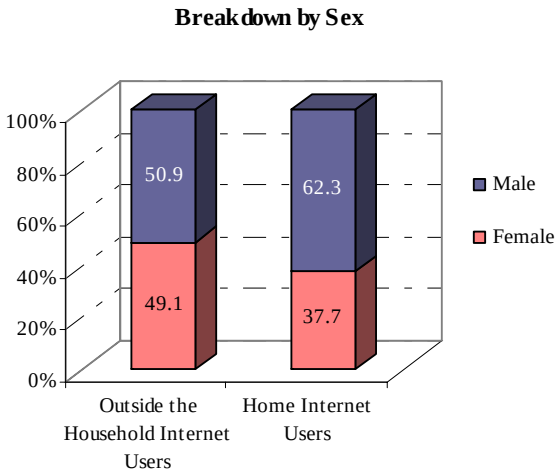
11.2. Consumer's Demographics

11.2.1. Breakdown by Sex

D12. Sex

Breakdown by Sex	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
Female	49.1(2)	37.7(1)	44.3
Male	50.9(2)	62.3(1)	55.7
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



Overall, there is a larger percentage of men who use the Internet as compared to women (55.7% vs. 44.3%).

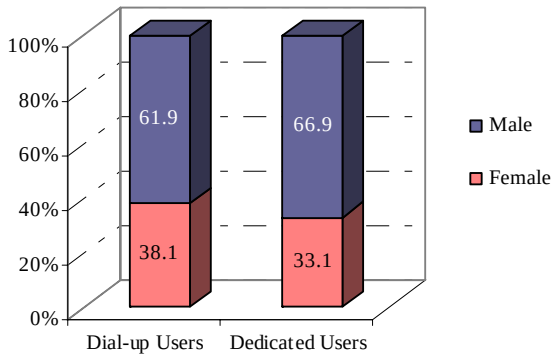
Men use the Internet especially from home rather than only outside the household (62.3% vs. 50.9%), while *women* are more likely to use the Internet only outside the household and not at home (49.1% vs. 37.7%).

D12. Sex

Breakdown by Sex	**Dial-up Users (base=409)**	**Dedicated Users (base=118)**	**Total (base=516)**
	%*		
Female	38.1	33.1	37.7
Male	61.9	66.9	62.3
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*

Breakdown by Sex



Regarding the use of Internet connections, *men* and *women* use the dial-up and dedicated connections similarly.

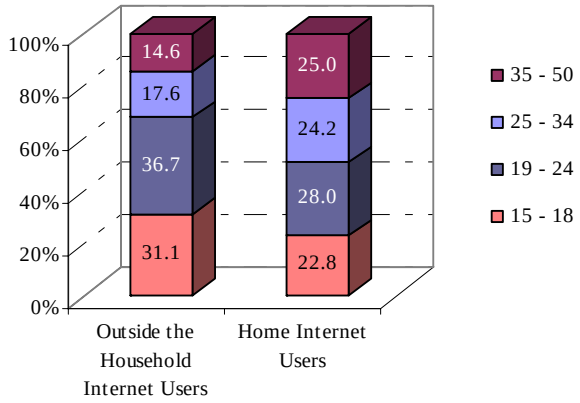
11.2.2. Breakdown by Age

D6. How old are you?

Breakdown by Age	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%		
15 - 18	31.1(2)	22.8(1)	27.6
19 - 24	36.7(2)	28.0(1)	33.1
25 - 34	17.6(2)	24.2(1)	20.4
35 - 50	14.6(2)	25.0(1)	18.9
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Age



Young persons (aged *between 15 and 18*, or *between 19 and 24*) are more likely to use the Internet outside the household rather than at home (31.1% vs. 22.8% and 36.7% vs. 28.0%).

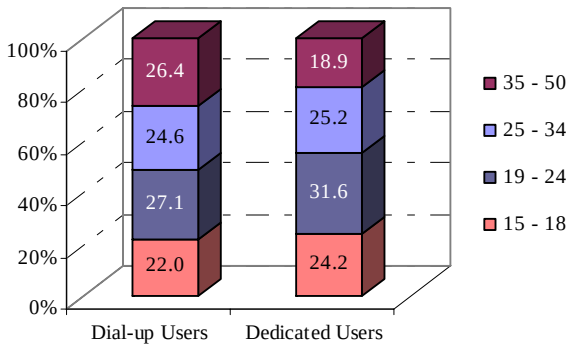
Those aged *between 25 and 34*, or *between 35 and 50*, are more likely to use the Internet at home rather than only outside the household (24.2% vs. 17.6% and 25.0% vs. 14.6%).

D6. How old are you?

Breakdown by Age	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
15 - 18	22.0	24.2	22.8
19 - 24	27.1	31.6	28.0
25 - 34	24.6	25.2	24.2
35 - 50	26.4	18.9	25.0
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*

Breakdown by Age



Irrespective of the Internet users age, there are no significant differences between the use of dial-up connections and dedicated connections.

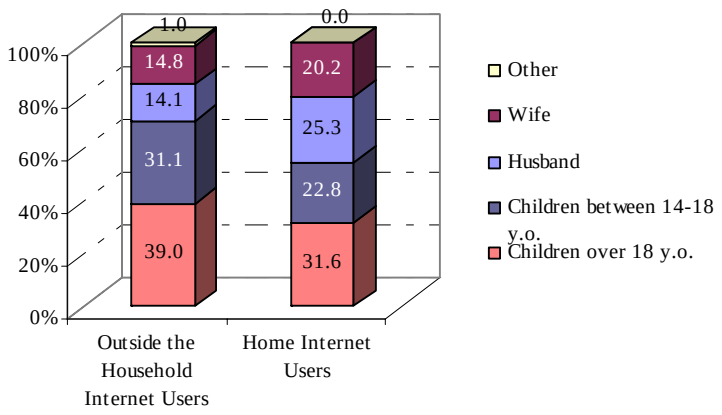
11.2.3. Respondent's Role within the Household

D3. What is your role within the household?

Respondent's Role within the Household	Outside the Household Internet Users(1) (base=552)	Home Internet Users(2) (base=516)	Total (base=1,068)
	%		
Children over 18 y.o.	39.0(2)	31.6(1)	35.9
Children between 14-18 y.o.	31.1(2)	22.8(1)	27.6
Husband	14.1(2)	25.3(1)	18.8
Wife	14.8(2)	20.2(1)	17.1
Other	1.0	0.0	0.6
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Respondent's Role within the Household



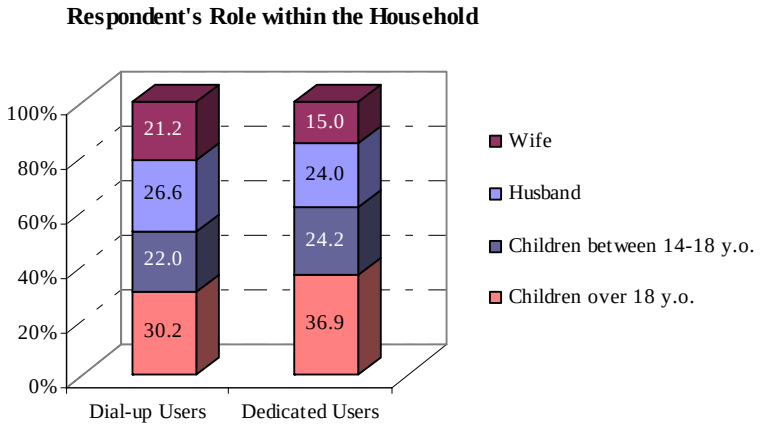
Children *over 18 years old* and those aged *between 14 and 18 years old* are most likely to use the Internet only outside the household (39.0% vs. 31.6% and 31.1% vs. 22.8%).

The *husbands* and the *wives* are more likely to be home Internet users rather that to use the Internet only outside the household (25.3% vs. 14.1% and 20.2% vs. 14.8%)

D3. What is your role within the household?

Respondent's Role within the Household	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
Children over 18 y.o.	30.2	36.9	31.6
Children between 14-18 y.o.	22.0	24.2	22.8
Husband	26.6	24.0	25.3
Wife	21.2	15.0	20.2
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*



There are no significant differences between the use of dial-up and dedicated connections, depending on the Internet users' role within the household.

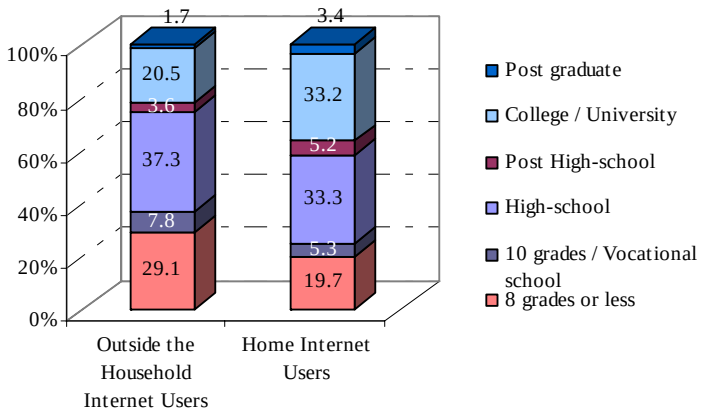
11.2.4. Breakdown by Education

D7. What is the last education level you attained?

Breakdown by Education	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
8 grades or less	29.1(2)	19.7(1)	25.1
10 grades / Vocational school	7.8	5.3	6.8
High-school	37.3	33.3	35.6
Post High-school	3.6	5.2	4.3
College / University	20.5(2)	33.2(1)	25.8
Post graduate	1.7	3.4	2.4
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Education



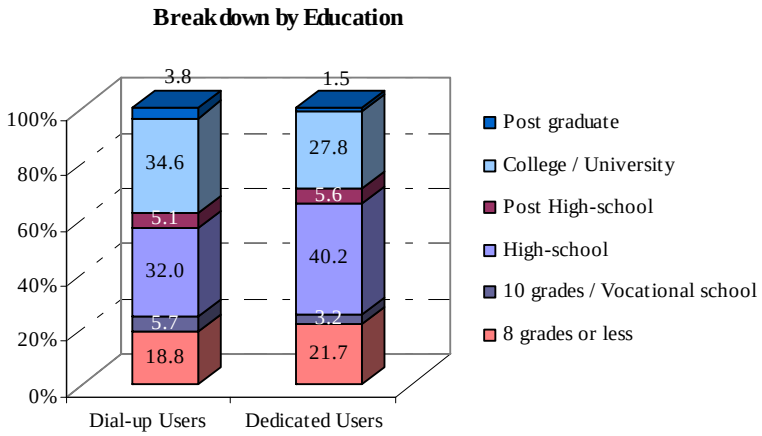
The majority of Internet users are *high-school graduates* (37.3% of outside the household Internet users and 33.3% home Internet users).

There is a significantly larger percentage of home Internet users who are *college or university graduates* as compared to outside the household Internet users (33.2% vs. 20.5%). Outside the household Internet users are more likely to be graduates of *8 grade or less* as compared to home Internet users, probably due to the high percentage of young outside the household Internet users.

D7. What is the last education level you attained?

Breakdown by Education	Dial-up Users (base=409)	Dedicated Users (base=118)	Total (base=516)
	%*		
8 grades or less	18.8	21.7	19.7
10 grades / Vocational school	5.7	3.2	5.3
High-school	32.0	40.2	33.3
Post High-school	5.1	5.6	5.2
College / University	34.6	27.8	33.2
Post graduate	3.8	1.5	3.4
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*



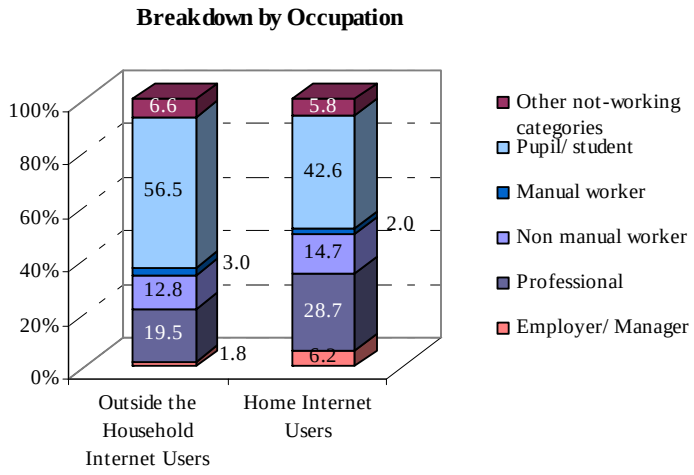
Most of dial-up and dedicated connections users are *high-school graduates* (32.0% and 40.2%) or *college/ university graduates* (34.6% and 27.8%).

11.2.5. Breakdown by Occupation

D8. What is your current occupation?

Breakdown by Occupation	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
Employer/ Manager	1.8(2)	6.2(1)	3.6
Professional	19.5(2)	28.7(1)	23.3
Non manual worker	12.8	14.7	13.6
Manual worker	3.0	2.0	2.6
Pupil/ student	56.5(2)	42.6(1)	50.7
Housewife	1.3	0.6	1.0
Retired	0.6	0.6	0.6
Unemployed	4.7	4.6	4.7
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



Most home Internet users are *pupils/ students* (42.6%) or *professionals* (28.7%).

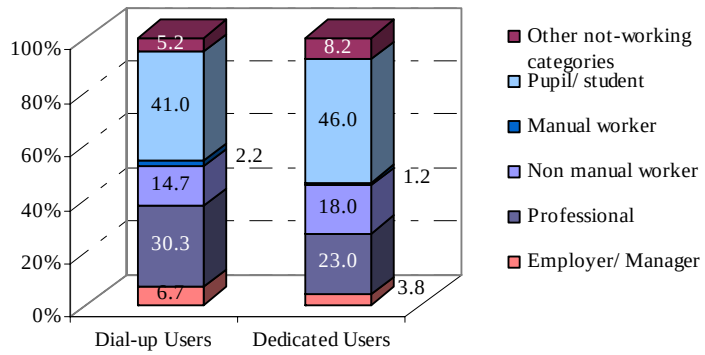
Outside the household Internet users are most likely to be *pupils/ students* (56.5%).

D8. What is your current occupation?

Breakdown by Occupation	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	%*		
Employer/ Manager	6.7	3.8	6.2
Professional	30.3	23.0	28.7
Non manual worker	14.7	18.0	14.7
Manual worker	2.2	1.2	2.0
Pupil/ student	41.0	46.0	42.6
Housewife	0.8	0.0	0.6
Retired	0.7	0.0	0.6
Unemployed	3.7(2)	8.2(1)	4.6
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Occupation



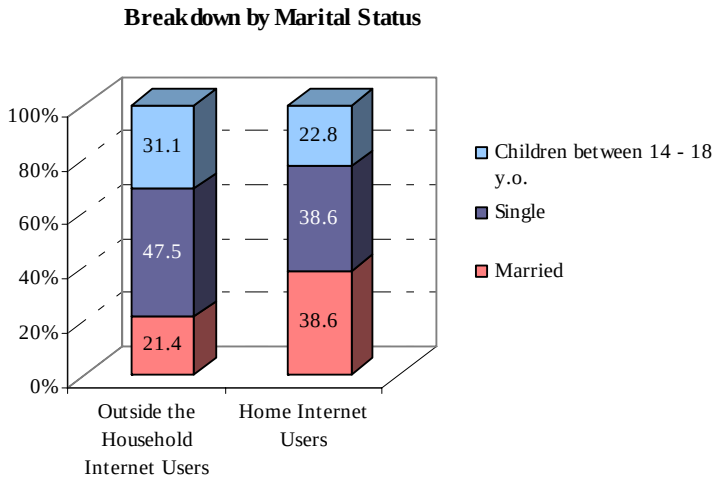
The large majority of dial-up and dedicated users are *professionals* (30.3% and 23.0%) or *pupils/ students* (41.0% and 46.0%).

11.2.6. Breakdown by Marital Status

D9. What is your marital status?

Breakdown by Marital Status	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
Married	21.4(2)	38.6(1)	28.6
Single	45.3(2)	37.3(1)	41.9
Divorced	1.6	1.3	1.4
Widow	0.6	0.0	0.3
Children between 14 - 18 y.o.	31.1(2)	22.8(1)	27.6
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



31.1% of outside the household Internet users and 22.8% of home Internet users are *children between the age of 14 and 18 years old*.

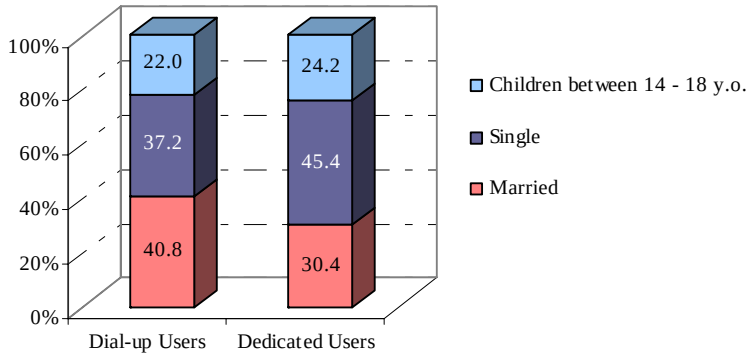
There is significantly larger percentage of *married* home users as compared to outside the household Internet users (38.6% vs. 21.4%).

D9. What is your marital status?

Breakdown by Marital Status	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	%*		
Married	40.8(2)	30.4(1)	38.6
Single	36.2	43.2	37.3
Divorced	1.0	2.2	1.3
Children between 14 - 18 y.o.	22.0	24.2	22.8
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Marital Status



22.0% of outside the household Internet users and 24.2% of home Internet users are *children between 14 and 18 years old.*

40.8% of outside the household Internet users are *married* as compared to only 30.4% of home Internet users.

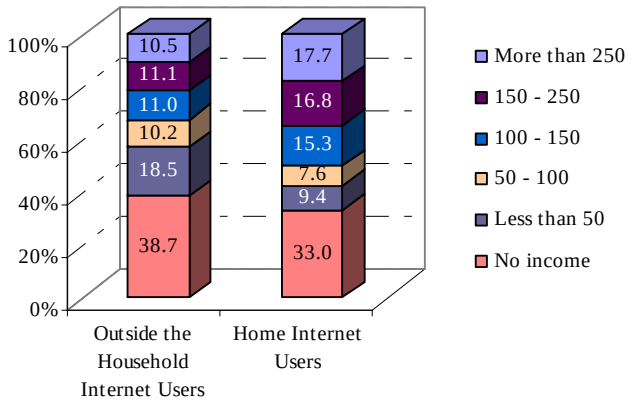
11.2.7. Breakdown by Personal Monthly Net Income

D10. What category does your personal monthly net income belong to?

Breakdown by Personal Monthly Net Income (USD)*	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
No income	38.7	33.0	36.4
Less than 50	18.5(2)	9.4(1)	14.7
50 - 100	10.2	7.6	9.1
100 - 150	11.0(2)	15.3(1)	12.8
150 - 200	5.4(2)	9.1(1)	6.9
200 - 250	5.7	7.7	6.5
250 - 300	2.0(2)	4.6(1)	3.1
More than 300	8.5(2)	13.1(1)	10.4
Total	**100.0**	**100.0**	**100.0**

** USD 1 = ROL 33,000*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Personal Monthly Net Income (USD)



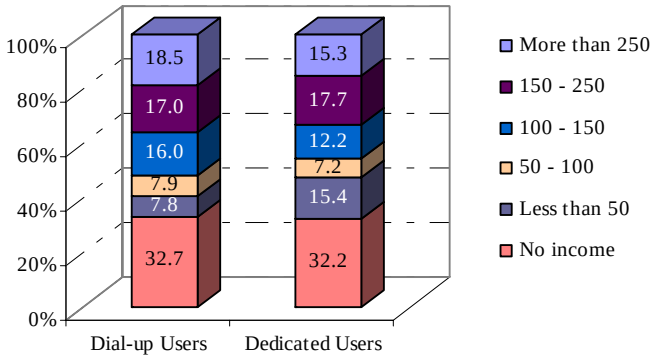
There is a significantly larger percentage of outside the household Internet users who have a personal monthly net income of USD100 or less, as compared to home Internet users (67.4% vs. 50.0%). This is most likely due to the high percentage of young Internet users, especially in the outside the household Internet users category.

D10. What category does your personal monthly net income belong to?

Breakdown by Personal Monthly Net Income (USD)*	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	%**		
No income	32.7	32.2	33.0
Less than 50	7.8(2)	15.4(1)	9.4
50 - 100	7.9	7.2	7.6
100 - 150	16.0	12.2	15.3
150 - 200	9.2	11.3	9.1
200 - 250	7.9	6.5	7.7
250 - 300	4.5	4.6	4.6
More than 300	13.9	10.7	13.1
Total	**100.0**	**100.0**	**100.0**

** USD 1 = ROL 33,000*
*** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Personal Monthly Net Income (USD)



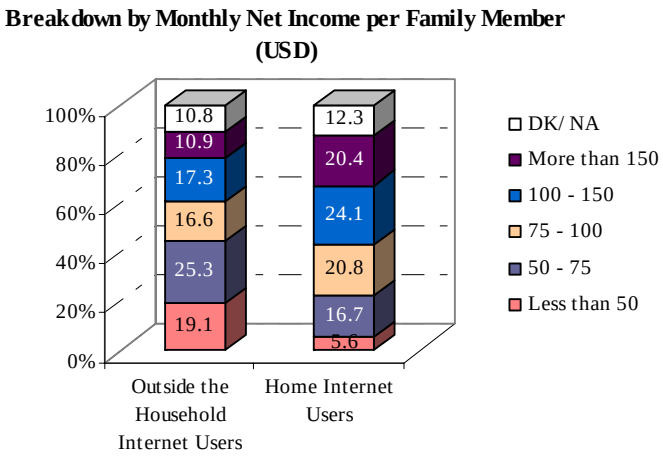
48.4% of dial-up users and 54.8%% of dedicated users have personal monthly net income of *USD100 or less.*

11.2.8. Breakdown by Monthly Net Income per Family Member

D11. What category does your monthly net income per family member belong to?

Breakdown by Monthly Net Income per Family Member (USD)*	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
Less than 50	19.1(2)	5.6(1)	13.4
50 - 75	25.3(2)	16.7(1)	21.7
75 - 100	16.6	20.8	18.4
100 - 125	11.8	14.3	12.9
125 - 150	5.5(2)	9.8(1)	7.3
150 - 200	3.4	5.5	4.3
More than 200	7.5(2)	14.9(1)	10.6
DK/ NA	10.8	12.3	11.4
Total	**100.0**	**100.0**	**100.0**

** USD 1 = ROL 33,000*
Statistical significant differences between percents (1, 2) (level of confidence 95%)



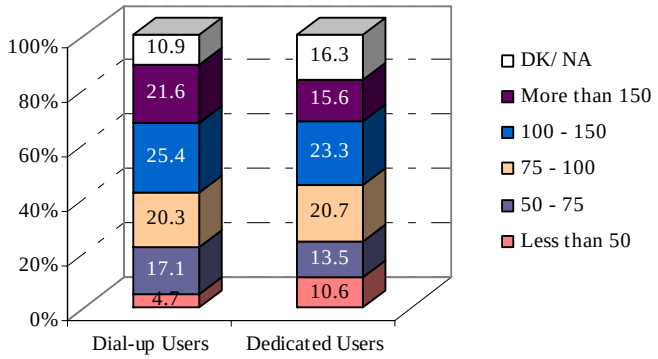
There is a significantly larger percentage of outside the household Internet users who have monthly income per family member of USD75 or less, as compared to home Internet users (44.4% vs. 22.3%).

D11. What category does your monthly net income per family member belong to?

Breakdown by Monthly Net Income per Family Member (USD)*	Dial-up Users(1) (base=409)	Dedicated Users(2) (base=118)	Total (base=516)
	%**		
Less than 50	4.7(2)	10.6(1)	5.6
50 - 75	17.1	13.5	16.7
75 - 100	20.3	20.7	20.8
100 - 125	15.4	14.4	14.3
125 - 150	10.0	8.9	9.8
150 - 200	6.0	4.3	5.5
More than 200	15.6	11.3	14.9
DK/ NA	10.9	16.3	12.3
Total	**100.0**	**100.0**	**100.0**

** USD 1 = ROL 33,000*
*** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Monthly Net Income per Family Member (USD)

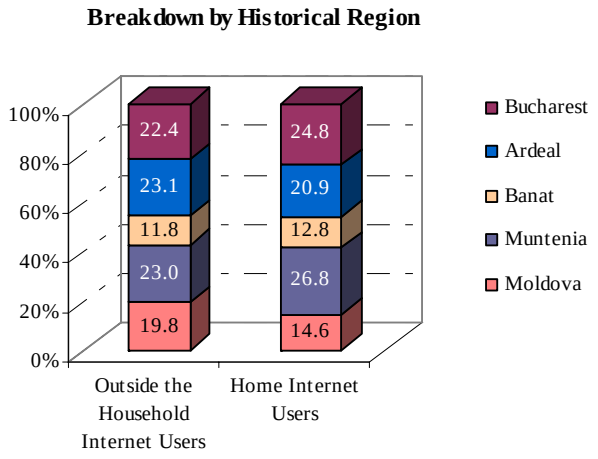


Most of the dial-up or dedicated connections users have monthly net income per family member of *USD100 or less* (42.1% and 44.8%).

11.2.9. Breakdown by Historical Regions

Breakdown by Historical Regions	**Outside the Household Internet Users(1) (base=552)**	**Home Internet Users(2) (base=516)**	**Total (base=1,068)**
	%		
Moldova	19.8(2)	14.6(1)	17.6
Muntenia	23.0	26.8	24.6
Banat	11.8	12.8	12.2
Ardeal	23.1	20.9	22.2
Bucharest	22.4	24.8	23.4
Total	**100.0**	**100.0**	**100.0**

Statistical significant differences between percents (1, 2) (level of confidence 95%)



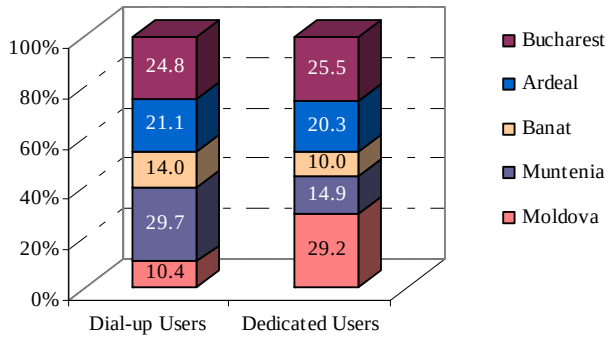
In Moldova, people use the Internet mainly only outside the household (19.8% vs. 14.6% at home).

In Banat, there is a smaller percentage of Internet users as compared to the other historical regions.

Breakdown by Historical Regions	**Dial-up Users(1) (base=409)**	**Dedicated Users(2) (base=118)**	**Total (base=516)**
	%*		
Moldova	10.4(2)	29.2(1)	14.6
Muntenia	29.7(2)	14.9(1)	26.8
Banat	14.0	10.0	12.8
Ardeal	21.1	20.3	20.9
Bucharest	24.8	25.5	24.8
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Historical Region

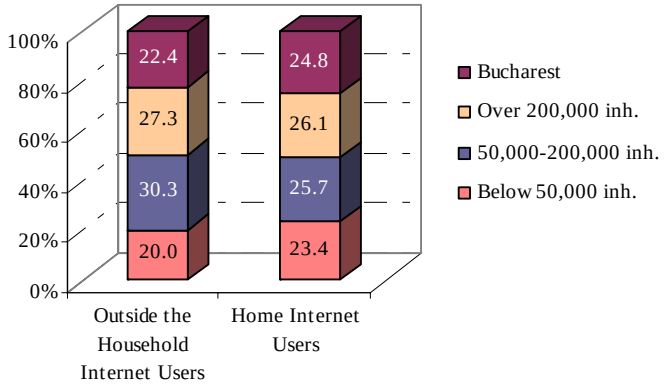


In Moldova people use mostly dedicated connections (29.2% vs. 10.4%), while in Muntenia they use mostly dial-up connections (29.7% vs. 14.9%).

11.2.10. Breakdown by Urbanization Degree

Breakdown by Urbanization Degree	**Outside the Household Internet Users (base=552)**	**Home Internet Users (base=516)**	**Total (base=1,068)**
	%		
Below 50,000 inh.	20.0	23.4	21.4
50,000-200,000 inh.	30.3	25.7	28.4
Over 200,000 inh.	27.3	26.1	26.8
Bucharest	22.4	24.8	23.4
Total	**100.0**	**100.0**	**100.0**

Breakdown by Urbanization Degree

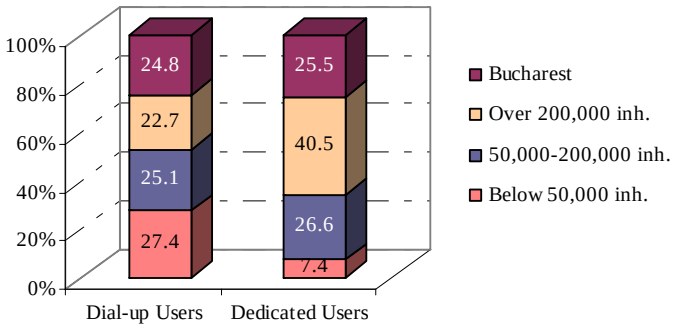


Regarding the Internet use, there are no significant differences depending on the urbanization degree.

Breakdown by Urbanization Degree	**Dial-up Users(1) (base=409)**	**Dedicated Users(2) (base=118)**	**Total (base=516)**
	%*		
Below 50,000 inh.	27.4(2)	7.4(1)	23.4
50,000-200,000 inh.	25.1	26.6	25.7
Over 200,000 inh.	22.7(2)	40.5(1)	26.1
Bucharest	24.8	25.5	24.8
Total	**100.0**	**100.0**	**100.0**

** Base: Home Internet users*
Statistical significant differences between percents (1, 2) (level of confidence 95%)

Breakdown by Urbanization Degree



In smalls cities (with less than 50,000 inhabitants) there is a significantly higher percentage of *dial-up users* as compared to dedicated users (27.4% vs. 7.4%).

On the other hand, in large cities (with more than 200,000 inhabitants), people use mostly *dedicated connections* rather than dial-up connections (22.7% vs. 40.5%).