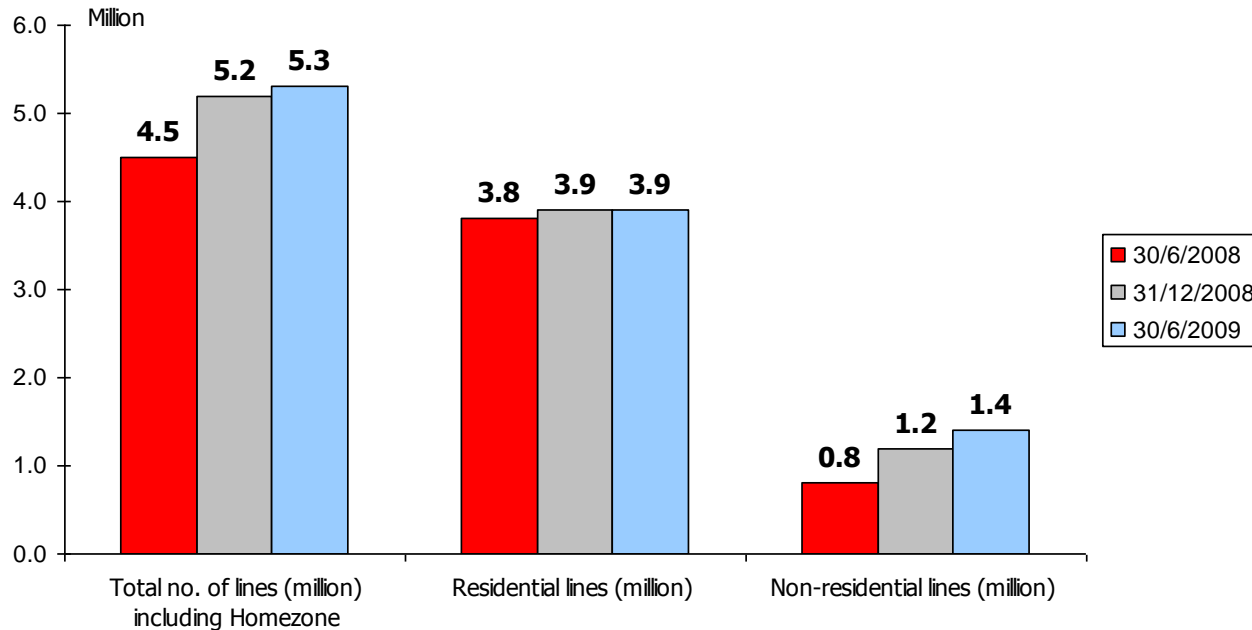


**Romanian
Electronic Communications Market
in the context of the Economic Downturn**

Cătălin MARINESCU
President

Global Forum 2009
Bucharest, October 19, 2009

Fixed Telephony Penetration Up, Voice Traffic Down



Penetration rate UP

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

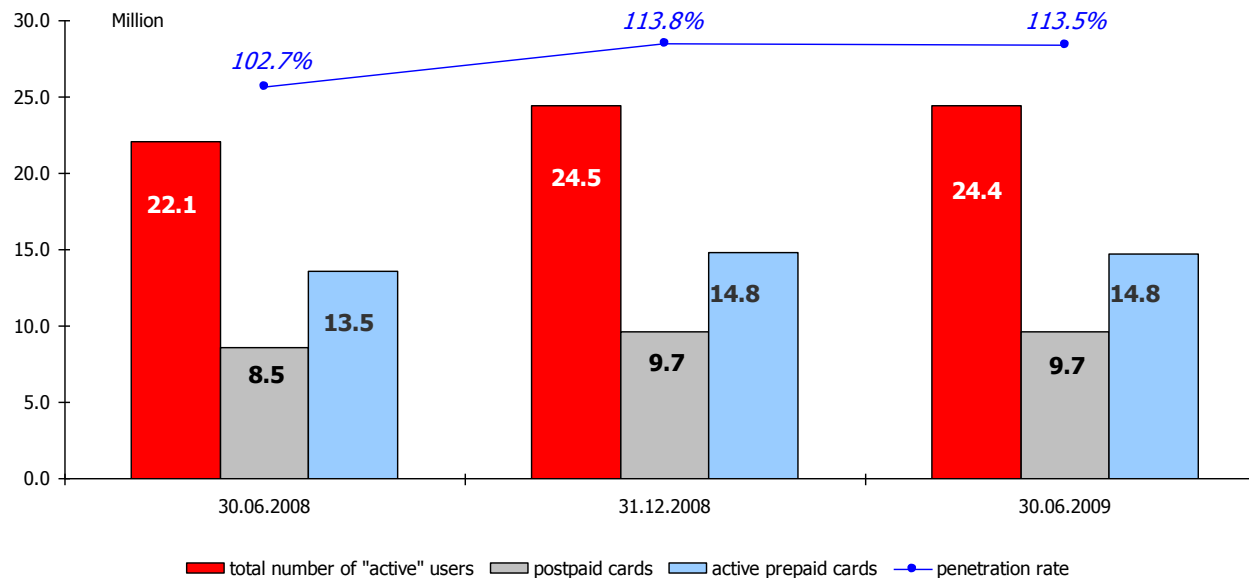
per 100 households – **54.6%** (+3.1% compared to 30.06.2008)

Voice traffic DOWN

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

Mobile Telephony

Number of Users Steady, Voice Traffic Significantly Up



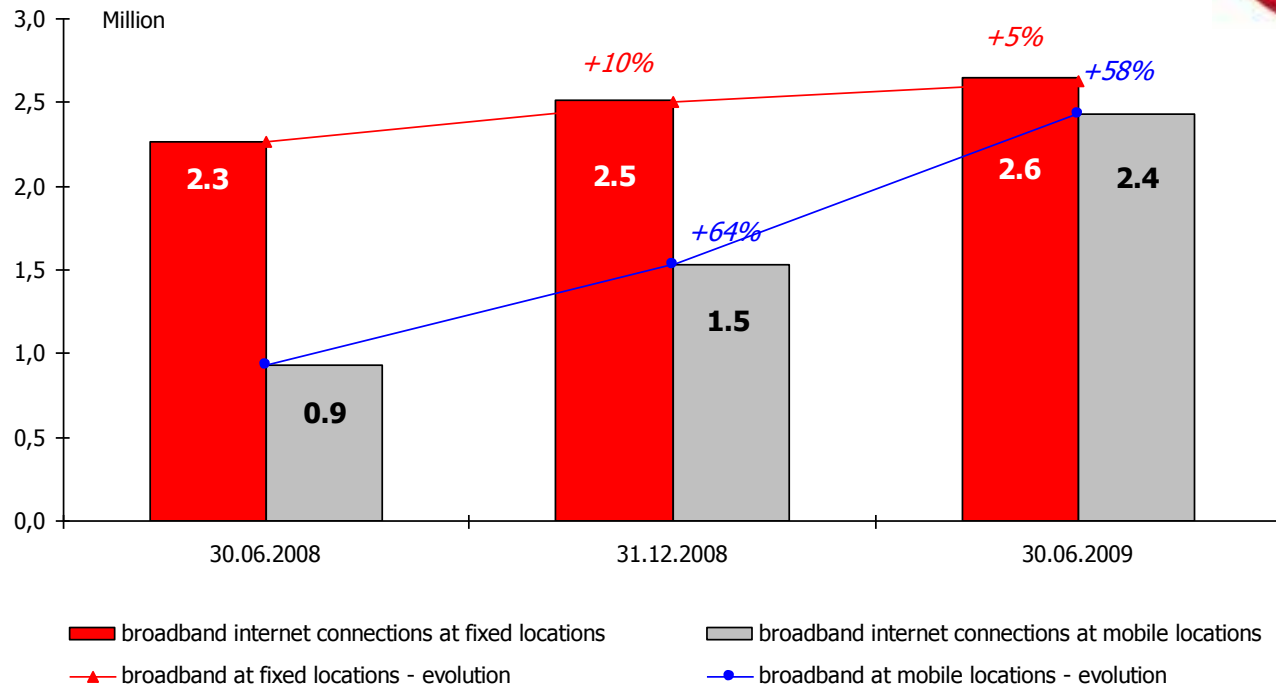
Penetration - STAGNATION

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

Voice traffic UP

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

Broadband Internet Access Penetration Increases



Broadband internet connections at fixed locations:

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

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

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

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

Includes connections via mobile handsets, modems/cards/keys

Key Determinants

- Higher Competition
- Adaptable and dynamic business plans
- Innovation
- Flexible, attractive offers
- Lower, affordable prices
and last, but not least
- Lower Termination Rates, which enable attractive off-net offers
- Portability

⇒ Same client base, higher consumption, lower prices

Thank you for your attention.

catalin.marinescu@ancom.org.ro

www.ancom.org.ro