



Telecommunications market in Romania 2008

Development forecasts for 2008-2012

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A word from the author



„The Romanian economy has been robust recently. It has not all been due to the country’s EU accession, but also to the observable growing consumption and dynamically increasing private disposable incomes. According to preliminary data for Q1 2008, GDP growth in Romania amounted to 8.2%, which was the second best score in the European Union (after Slovakia). Concurrently, wage consumption went up by 11.2% year-on-year, while wages jumped by as much as 18% year-on-year.

The promising macroeconomic climate has also made an impact on the telecommunications market. While the country follows the trends noted in other European countries in declining use of in fixed-line telephony, it has also seen mobile telephony expand and further 3G investments. So far, a large proportion of Romanian internet users disclose they connect to the internet only via a mobile handset. Today, the market is amidst a true boom of home wire-based broadband subscribers. The on-going consolidation of small ISPs and local networks market is also a trend worthy of note.

The time is now for Romania. But what are the concerns and will the market see any difficulties in the coming years? What market niches will evolve? What kind of margins can market players count on? Find out more in our latest report “Telecommunications market in Romania 2008 – Development forecasts for 2008-2012”.

Paweł Olszynka, Head IT&Telecoms Analyst

PMR MarketInsight Methodology

This report was prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. **It also contains special procedures to follow in the case of incomplete market.**

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PMR
MarketInsight
Methodology

In 2007 Romanian
telecoms
market increased
by 14%.

Report description

In our report, you will find the most current and comprehensive overview of the Romanian telecommunications market. It includes analyses and forecasts for the entire telecoms market as well as its individual segments. Forecasts are provided for the three vertical segments of the telecoms industry - mobile telephony, fixed-line telephony as well as data transmission and internet services provision.

Crafted using MarketInsight, PMR proprietary research methodology, this invaluable report is derived from scrupulous analysis of in-house data, public domain sources as well as interviews with key industry players.

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Key sections

The telecommunications market in Romania

- Market value and dynamics 2000-2007
- Current market situation and key events in 2007
- List of crucial events for the market from 2000 till the end of Q1 2008
- Key market trends visible in 2000-2007
- Factors affecting market situation
- Barriers and stimuli to the development of the Romanian telecoms market
- State of the country's telecoms infrastructure
- Overview of the regulatory issues and institutional environments
- Market transparency and business risks
- Structure and key players on the telecommunications market in Romania
- List of 50 largest companies on the telecoms market
- Possibility of new players entering the market and the occurrence of mergers and acquisitions
- Market development forecast for 2008-2012
- Growth potential of market segments over the next few years

Mobile penetration in Romania reached 106% at the end of 2007.

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Over 90% of pre-paid SIM cards in Romania are used by individuals.

The mobile telephony market

- Market value and dynamics 2000-2007
- Current market situation and key events in 2007
- Key market trends visible from 2000-2007
- Change in mobile call charges
- 3G telephony development
- Key players and major trends in the mobile market
- Number of mobile telephony users and penetration from 2000-2007
- Problem of inactive SIM cards
- Share of business users in the overall subscriber base
- Shares of post-paid and pre-paid subscribers from 2000-2007
- Share of non-voice in the total revenues of mobile operators 2000-2007
- Description of the non-voice services market in mobile telephony in Romania
- Key market indicators from 2000-2007
- Traffic statistics
- Shares of the largest operators by number of subscribers and revenues
- Detailed profiles of the major market players
- Market forecasts for 2008-2012

The fixed-line telephony market

- Market value and dynamics for 2000-2007
- Current market situation and key events in 2007
- Key market trends visible from 2000-2007

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- Change in prices of fixed-line calls
- Number of fixed-line telephony users and penetration from 2000-2007
- Number of business lines and key trends on the business fixed-line market
- Situation in particular market segments
- VoIP influence on all the fixed-line segments
- Detailed description of the largest fixed-line operators
- Market forecasts for 2008-2012

Decline of the Romanian fixed-line telephony market is slower in comparison with other CEE countries.

Data transmission and internet services provision

- Market value and dynamics for 2000-2007
- Current market situation and key events in 2007
- Key market trends visible from 2000-2007
- Value of the submarkets: internet services provision, data transmission and line rental market
- Number of business internet access lines and key trends on the business internet market
- Change in prices of internet access
- Internet market overview for 2000-2007
- Popularity of particular internet access technologies in Romania
- List of the 50 largest internet services providers
- Detailed profiles of major ISPs
- Forecasts regarding value of the market, number of internet and broadband internet access subscribers by technologies for 2008-2012

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Romanian internet access market will become more consolidated within 2-3 years.

An essential read for:

- top management and marketing departments of companies either already active or considering launching operations on the telecommunications market in Romania
- cable TV operators and major IT companies
- consulting, research and analytical firms, brokerage houses, banks and investment funds
- government institutions, embassies and sector organisations.

This report is an invaluable resource for any company active in or considering entry to the Romanian telecommunications sector.

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