

03 November 2016

# Orange

# Keeping up with the Romanians

Liudmila Climoc



# Romanians and Orange

116%



## Mobile penetration

In Romania it is common to have users with two mobile phones and two SIM cards

1/2



## Romanians & Orange

One out of two Romanians is our client

12



## Years of market leadership

Orange is the telco leader in Romania for more than a decade

43%



## Households where Orange is present

We are in almost half of the Romanian homes

Taking one step further



# Following up on Essentials 2020

## Our path to convergence



### Best mobile connectivity

Mobile Broadband contributing to internet penetration in Romania

### Multi-screen TV

Orange connects users to their favorite content

- 80+ channels available online
- Orange TV Go is among the most downloaded Romanian app

### DTH TV service available since 2013

- Largest HD content
- 315K customers

### 2016 - one step further Orange Home

- >90 cities
- Fiber internet 1 Gbps
- Cable TV

# The prospects of convergence

## Economic growth

Romania - fastest economic growth in Europe in

+6% GDP in Q2 2016

## IT&C pillar

2<sup>nd</sup> contributor to GDP growth

## Telco market

Recovering trend in the telecom industry

## Orange solid performance

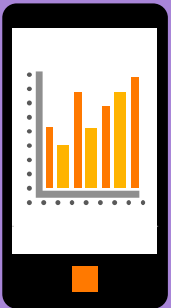
Revenues growth for 6 consecutive quarters

# Consumer endorsement

# 50%

of Romanian households are interested in convergent services in 2016

## Consumption meets technology



## Equipped households

- 67% of the households have both TV and internet services, mobile or fixed
- 66% of Romanians use smartphones while watching TV



## Consumption categories and the figures

94.4%



### TV penetration

The most popular content providing channel – almost 6 hours of daily TV consumption

51.8%



### Internet penetration

In half the time required by the TV to penetrate Romania, internet has reached over half of the population. And it is growing fast

55%



### Fixed and mobile internet

More than half of the households in Romania use both mobile and fixed internet

15%



### Same operator for fixed and mobile internet

A trend on the rise – starting with the first trimester of 2014, adoption of convergence has increased more than 2 times in 2 years

# Orange strongholds for convergence

1

## Mobile leadership

For 12 years Orange is mobile market leader in Romania

2

## Our customers

We are present in almost half of households in Romania

More than 60% of our Postpaid customers are with Orange for more than 10 years

3

## Our brand

Orange is leader in brand power.

Top customer appreciation:

**Customer service**  
**Network quality**  
**Constant innovation**

4

## Our experience

Romania is supported by Orange Group, set out to be the 1<sup>st</sup> convergent player in Europe



**Our response for  
convergent need - best  
experience for both  
mobile and fixed**



**The fastest  
and most  
widespread  
4G mobile  
network in  
Romania**

**Widest  
distribution  
network  
Innovative  
Smart store  
concept roll-  
out**

**Fast fixed  
internet  
1 Gbps**

**Rich TV  
proposition**

Largest offer of  
**#HD** Channels

# Orange Home Benefits



## Simplicity

- one invoice
- one Customer support
- speedy service - installation over 70% in 3 days
- QR code for WIFI password

## Relationship

- detailed installation process in tutorials
- validation done by customer
- proactive call – 97% happy customers
- rewarding loyalty when joining Orange Home

## Best technology

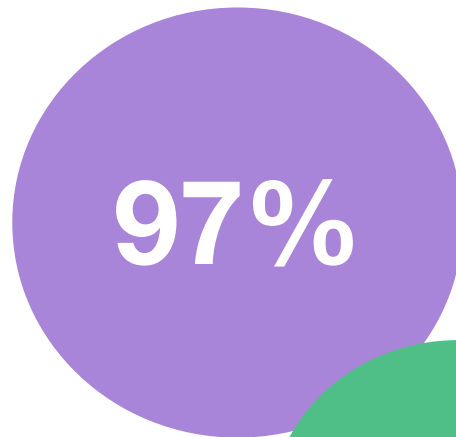
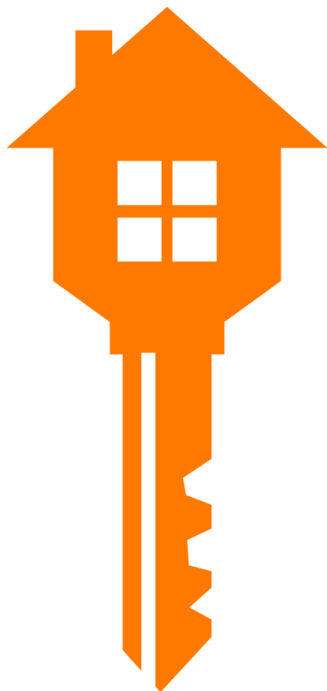
- fiber network, 50% urban households
- 4G 97.5% urban coverage
- linear TV & multiscreen OTT
- Smart Home unique proposition on Romanian market

## Value for money

- special price for mobile customers
- 30% value benefit for convergent offer
- loyalty reward for convergent customers

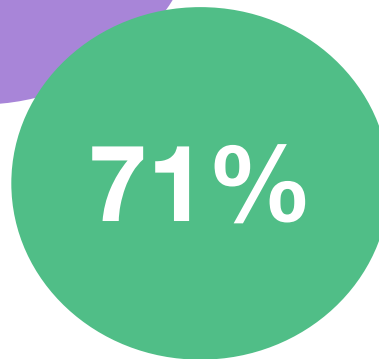
# Customer satisfaction is key

we are on an encouraging trend



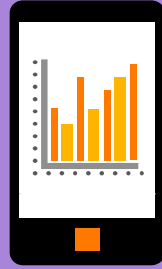
**Customer satisfaction  
after installation**

**Of our customers have  
their services installed in  
less than 3 days**



## What is next

Consolidate  
leadership



## Aim

Become the customer  
first choice for  
convergent services

## Grow

Leverage on  
convergence as  
growth engine



# Thanks

**Liudmila Climoc**



**Reinventing  
customer  
relationship**

**96%**

**Customer  
satisfaction on 4G  
network - Orange  
4G Fun Kit**

**13**

**Smart shops and  
stores today to  
simplify the customer  
journey**

