

Smart Telecom Management

Ezwim Telecom Monitor 2008

About Ezwim

Ezwim, a global leader in Telecom Expense Management services, provides Telecom Management services to enterprises and Online Telecom Manager services to operators using a Software-as-a-Service (SaaS) set up.

Our clients



EPSON®



TOSHIBA

STORK®



Telfort.



Ezwim Facts

99,8% Service Uptime | > 80 Blue Chip Customers

> 1.000.000 End Users | > 1 Billion Call Detail records processed per annum

More Information

For more information visit www.ezwim.com

Learn more about Telecom Management at www.telecomexpensemanagementblog.com

Contact us: info@ezwim.com

About Ezwim Telecom Monitor

- Annual research on mobile phone usage within enterprises
- Findings based on mobile phone usage data of Ezwim clients
- Data collected from The Netherlands, UK, Germany and the USA

Key findings

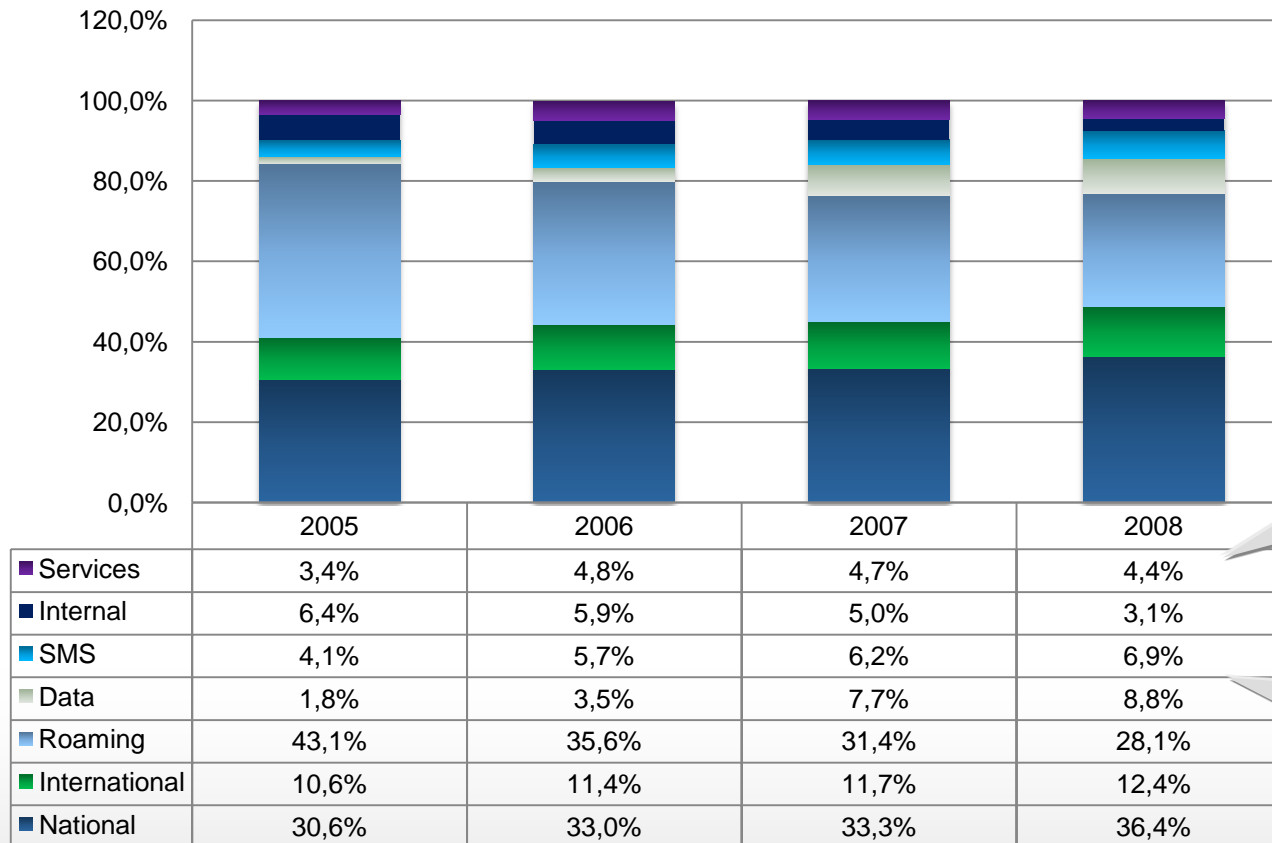
- Telecom cost ↗ 2,5% in 2008 compared to 2007
 - Strong increase in purchase of flat-fee bundles for both voice (↗ 62%) & mobile data (↗ 82%)
 - Data cost category continues to grow as smart phone grow in popularity
 - Number of mobile devices increase ↗ 13%

- Private use of Mobile phones is common
 - 28% of calling cost is private, slight decline compared to last year
 - France is a top roaming destination in the holiday months
 - Happy New Year, Bloody Friday and a soccer march are top SMS volume days

- Roaming
 - Roaming continues to represent an important cost representing 28% of telecom cost
 - Roaming costs continue to ↘

Cost categories

Cost categories per year



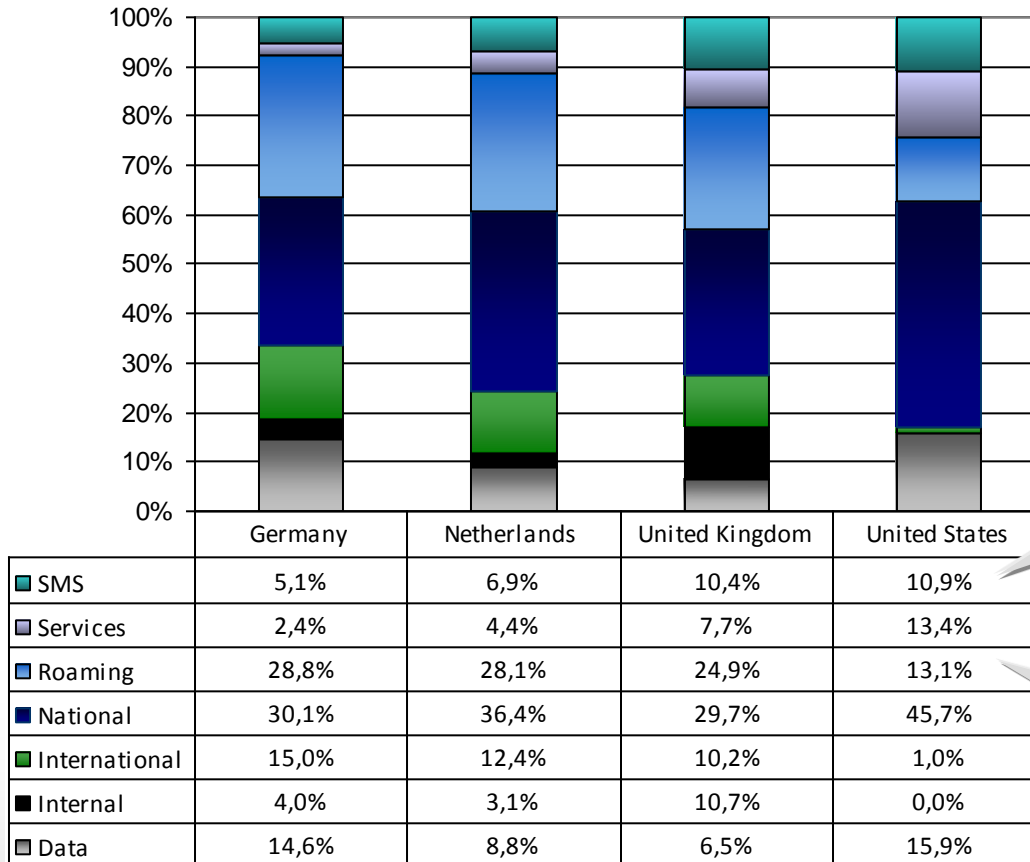
Low due to flat fee calling within enterprise

Data is a growing cost category, strong growth of data bundles

- National calls remain the no.1 cost category
- Roaming cost, the no. 2 cost driver continues its decline as operators drop roaming tariffs

Cost categories

Cost categories per country



SMS & service numbers popular in the US and UK

Roaming & International calling is lower in the USA compared to Europe

- The US Telecom Billing Data does not distinguish Internal costs

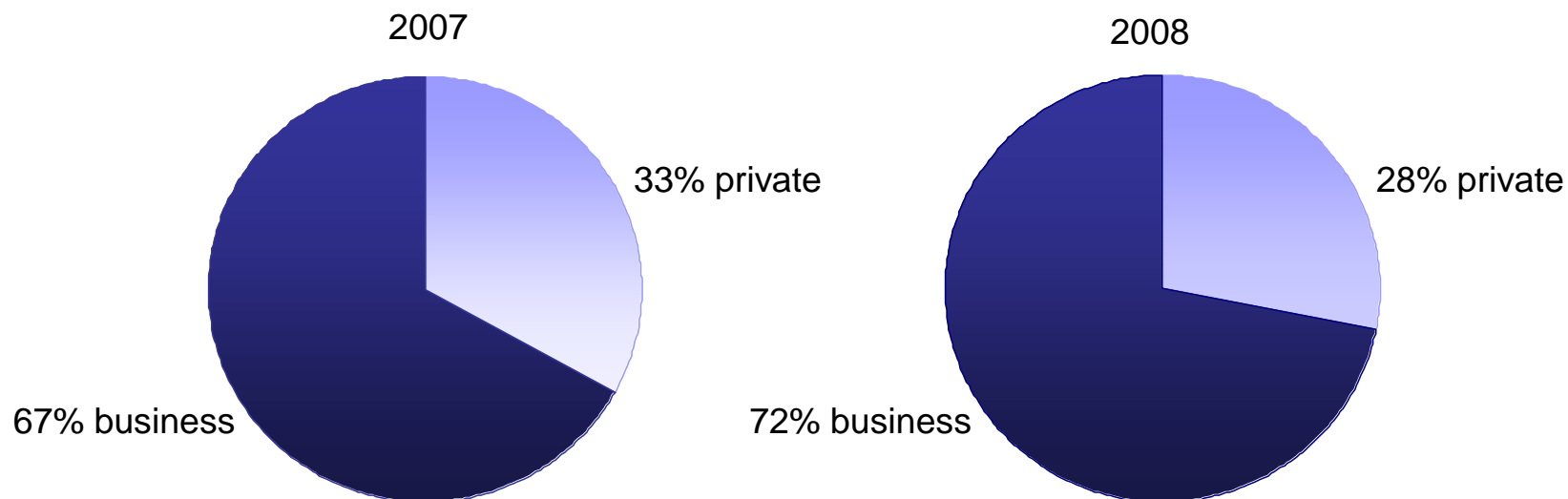
Subscriptions

Subscription fees for mobile voice and mobile data services are growing strongly from 2007 to 2008:

- Flat fee mobile data: ↗ 82%
 - Strong increase in national flat fee bundles
- Flat fee voice: ↗ 62%
 - Flat fee calling within the enterprise (On-Net / In-Bus)
 - SIM-Only subscriptions

Flat fee voice & data bundles and SIM-Only subscription grow in popularity within enterprises following the trend in the consumer market

Private vs business spend



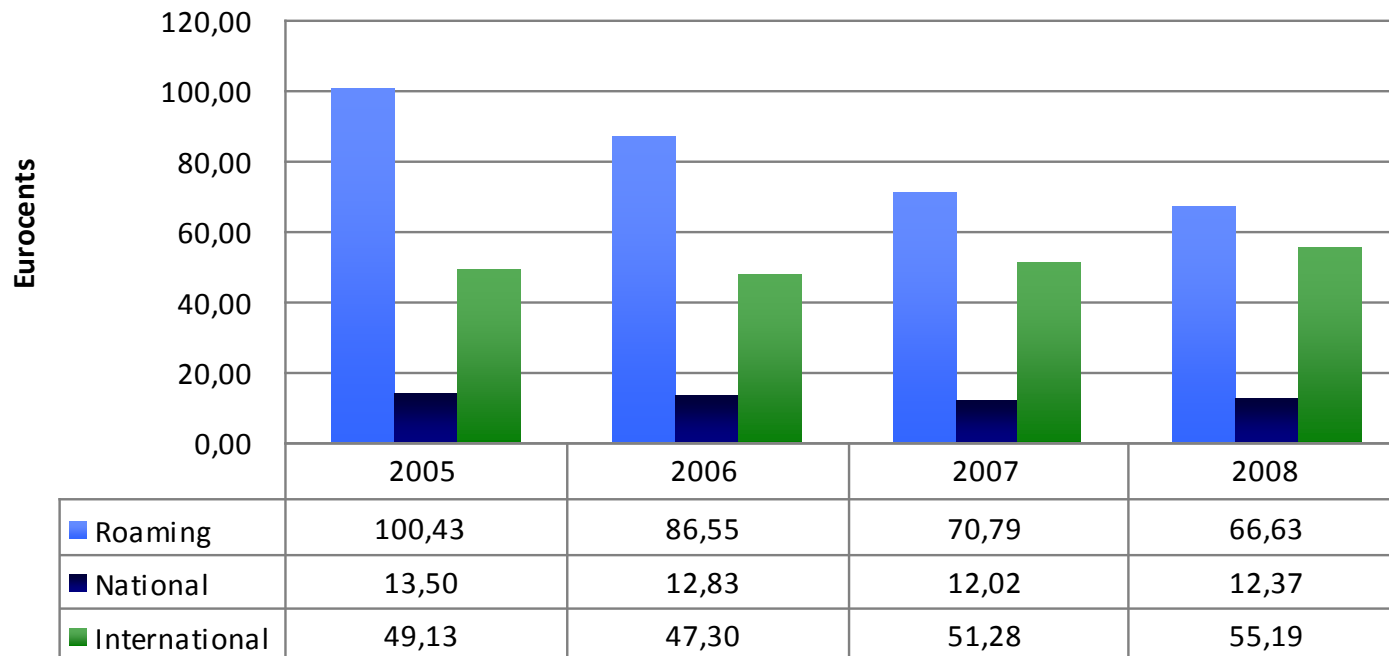
Annual calling cost per employee:	700 €
2 million employees in The Netherlands:	1.400.000.000 €
28% private:	400.000.000 €

Private usage of the company mobile phone is common and enterprises can save 400.000.000 € by using Telecom Expense Management services to:

- Get insight into telecom cost on every level of the organization
- Make employees aware of personal calling cost
- Implement telecom policies
- Negotiate better contracts with operators based on actual usage data

Cost per minute

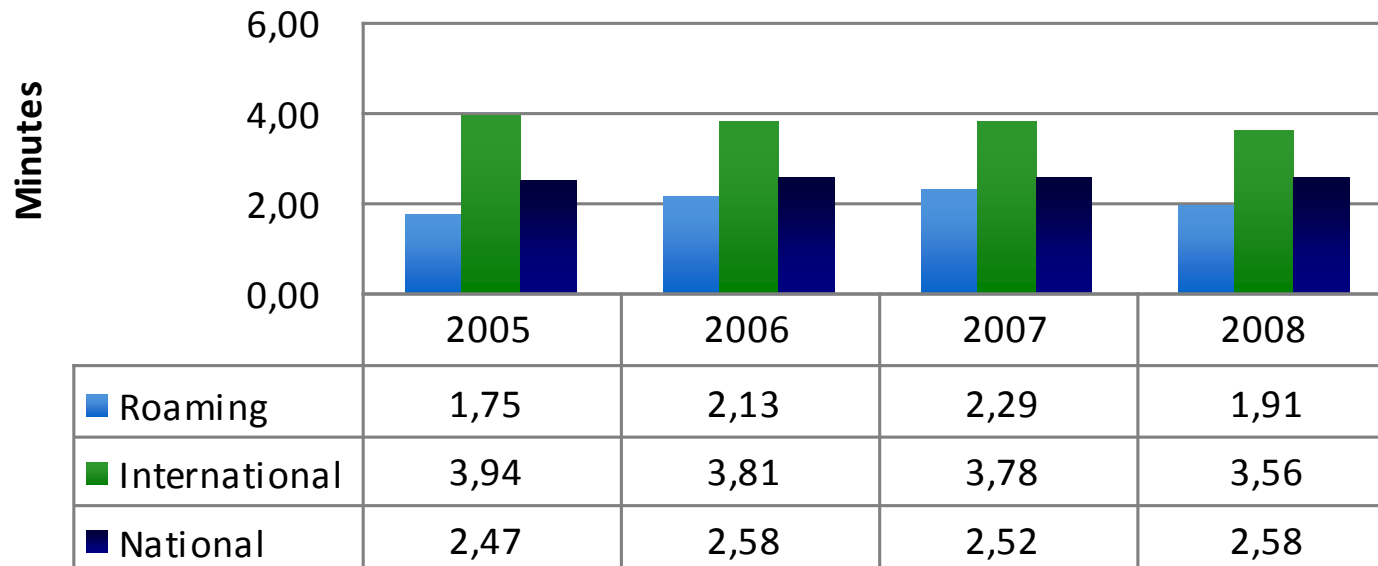
Cost per Minutes



Roaming costs continue to decline following EU regulations in 2007 however operators have increased International calling cost

Call duration

Call Duration



Call duration is declining for roaming/international calls, operator propositions with a “start fee” and “Billing per minute” are disadvantageous

Roaming per month

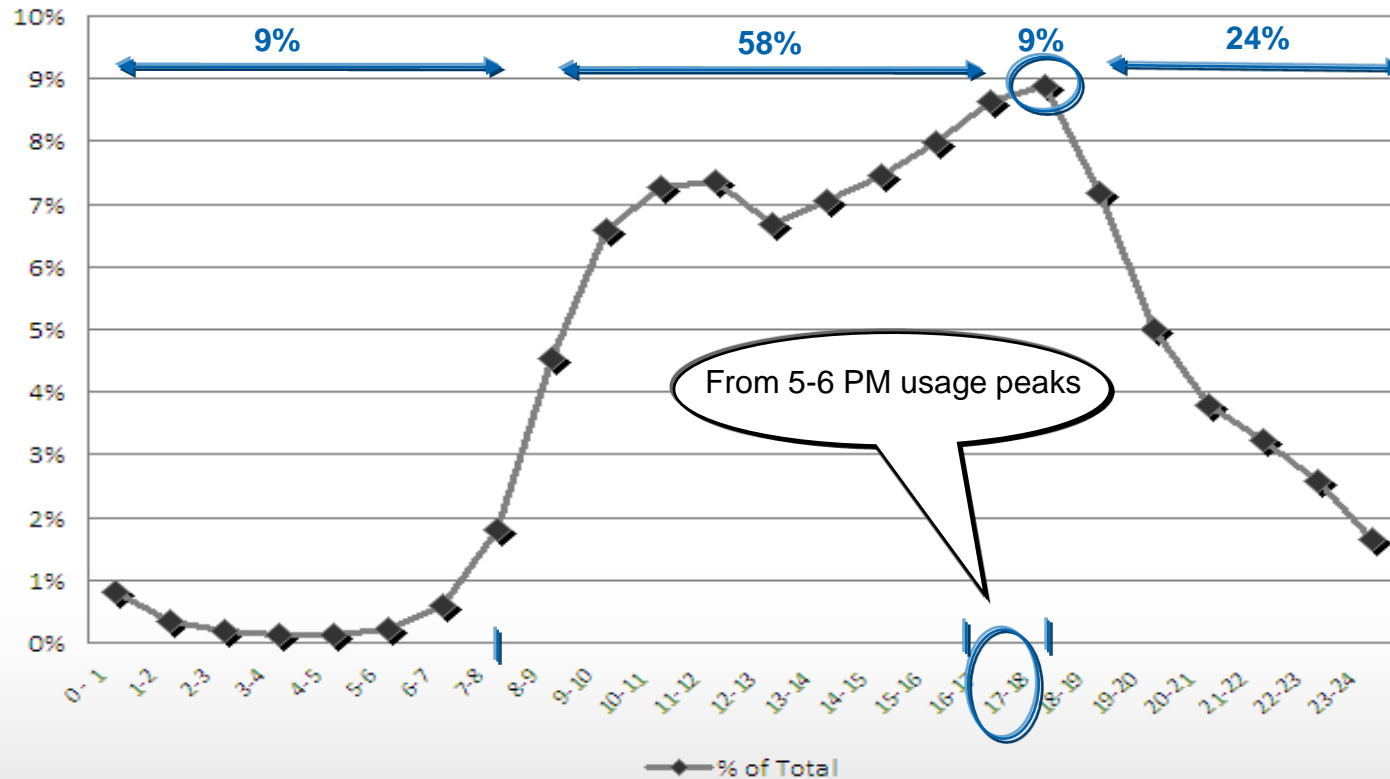
2007		2008	
USA	13%	USA	12%
Germany	11%	Germany	11%
Belgium	11%	Belgium	11%
UK	9%	UK	8%
France	8%	France	7%
China	5%	China	5%
Italy	3%	Spain	4%
Spain	3%	India	3%
India	2%	South Africa	3%
Austria	2%	Italy	3%

In July France is the no. 2 roaming destination representing 10% of roaming costs

Calling Cost - time of day

Working day cost distribution

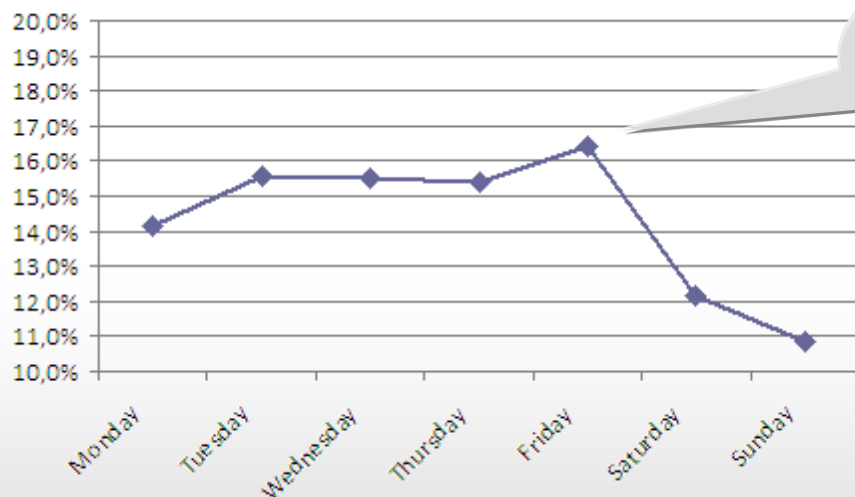
Over 35% of calling cost made outside of business hours



SMS – The Netherlands

Top 4 days with highest SMS cost in 2008

1. 1-1-2008 Happy New Year
2. 24-10-2008 Bloody Friday – (global stock exchanges decline)
3. 31-12-2008 Happy New Year
4. 13-06-2008 Holland – France 4-1



Friday is the most popular SMS-day

Devices

Brands

48% Nokia

22% Blackberry

30% Other (HTC, Qtek)

Device type

65% Voice phone

35% Smartphone



Service numbers

Service numbers consist of 0900 and 18## numbers

- Listening to voice mail consists of 50% of service number costs
- Telephone number information and traffic information service numbers are popular among employees
 - Requesting telephone number information takes 2,5 minutes (1,80 € per request) at 1888 and almost 3 minutes (2,30 €) at 1850.

Top 5 service numbers

1. Voice mail (1233)	51%
2. Number information (1888)	12%
3. Number information (1850)	6%
4. Marktplaats	3%
5. Traffic information	2%

Questions?

Contact info@ezwim.com for more information

