



Ezwim Telecom Monitor 2007

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About Ezwim

Our Mission

Ezwim leads the industry in helping enterprises to reduce telecom cost and increases the enterprise capability to manage the complex mobile and fixed telecom environment.

About Ezwim

Ezwim delivers **Telecom Expense Management services to enterprises** using a **Software-as-a-Service (SaaS) set up**.

Ezwim's solution, **Total Telecom Management (TTM)**, helps you to manage your telecom resources more effectively regardless of the number of operators or end-users involved.

Our clients



Ezwim Facts

99,8% Service Uptime | > 50 Blue Chip Customers |
> 1.000.000 End Users | > 1 Billion Call Detail records processed per annum

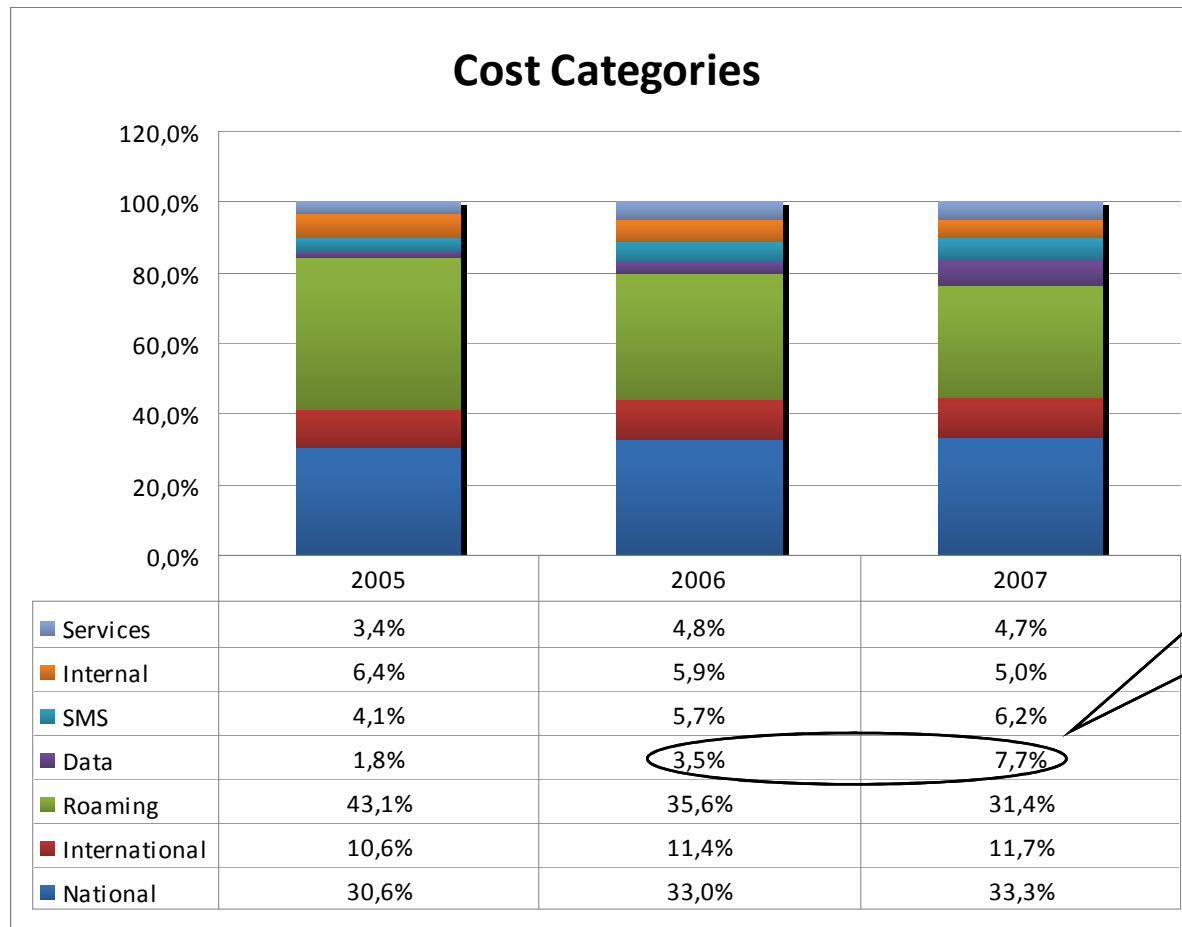


Telecom Monitor 2007

Key Findings

- Total telecom spend increases 18% in 2007 compared to 2006.
- The data cost category has more than doubled since 2006 to reach 8% of Telecom Costs. Data cards and blackberries are moving out of the boardroom and become more mainstream within enterprises.
- Roaming continues to represent an important cost category representing 31% of telecom cost, however roaming costs are on a steady decline, at the same time the number of roaming calls and duration increases.
- Private usage of the company mobile is on the rise: growth of 8,3% since 2006.
- Private use of Mobile phones is common:
 - 30% of calling cost is private.
 - France is the no.1 roaming destination in July & August.
 - January 1st – Happy New Year – is the no.1 SMS volume day.

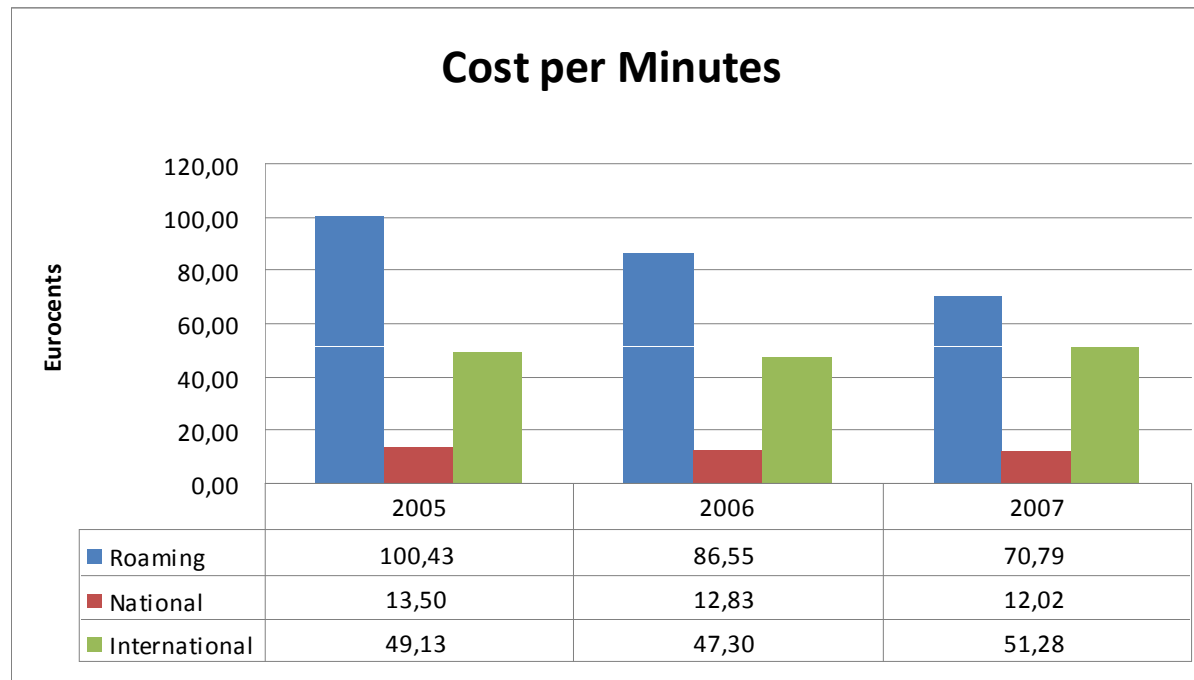
Cost Categories



Data costs are on the rise, data cards and Blackberries more mainstream

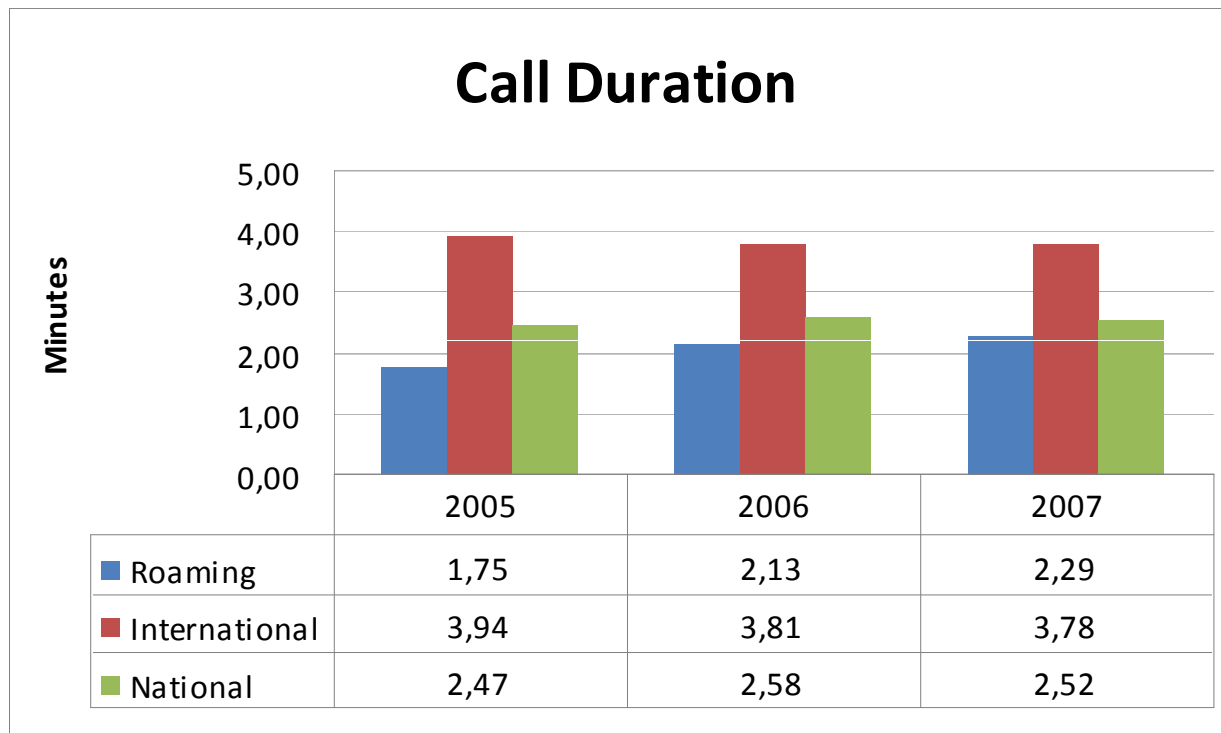
- National calls remain the no. 1 cost category representing 33%.
- Roaming cost, the no. 2 cost driver decline as operators drop roaming tariffs.

Cost per Minute



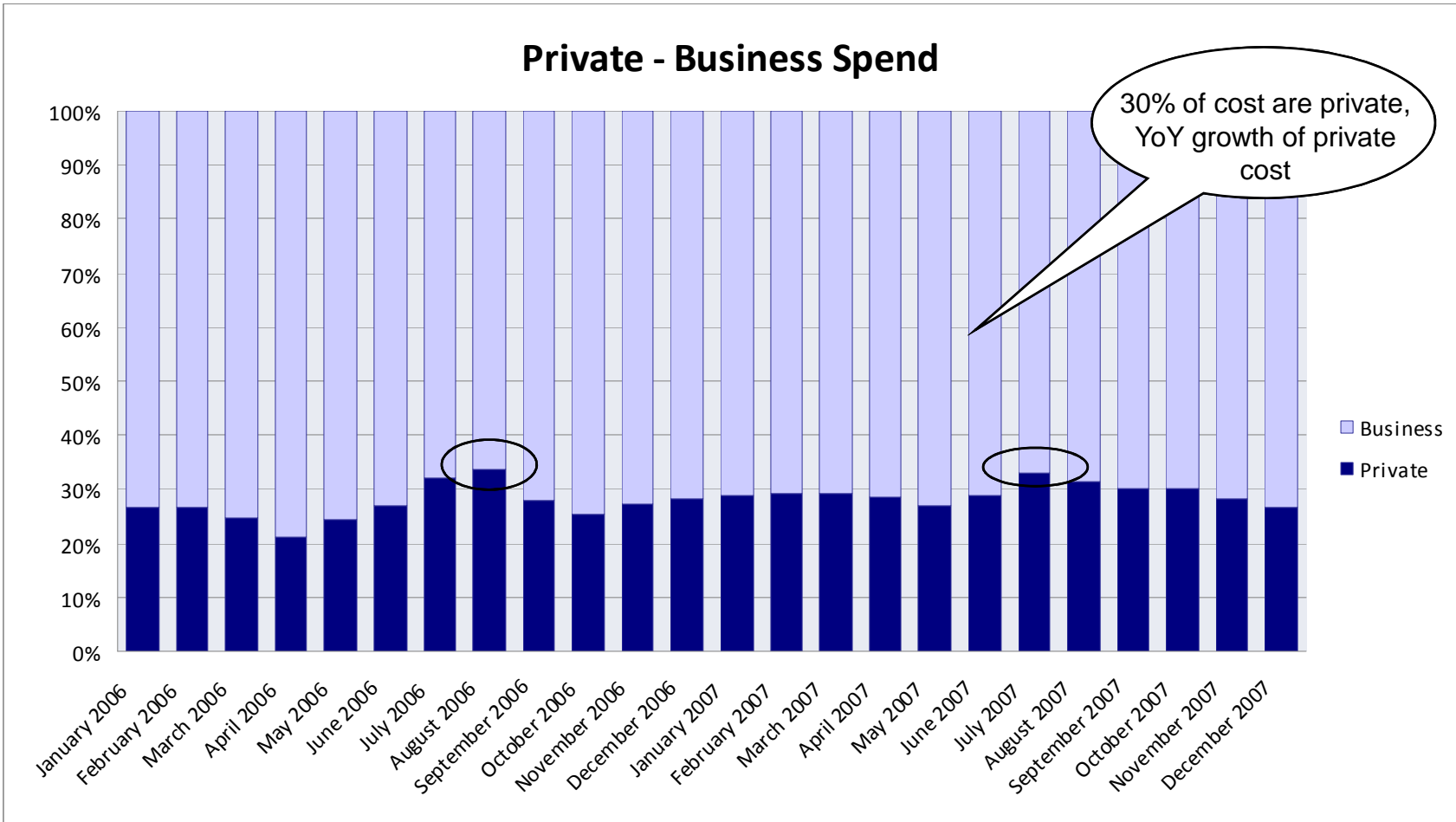
- Roaming costs are the strongest declining cost category; 18.2%
- International calling cost per minute increase by 8.4%

Call duration



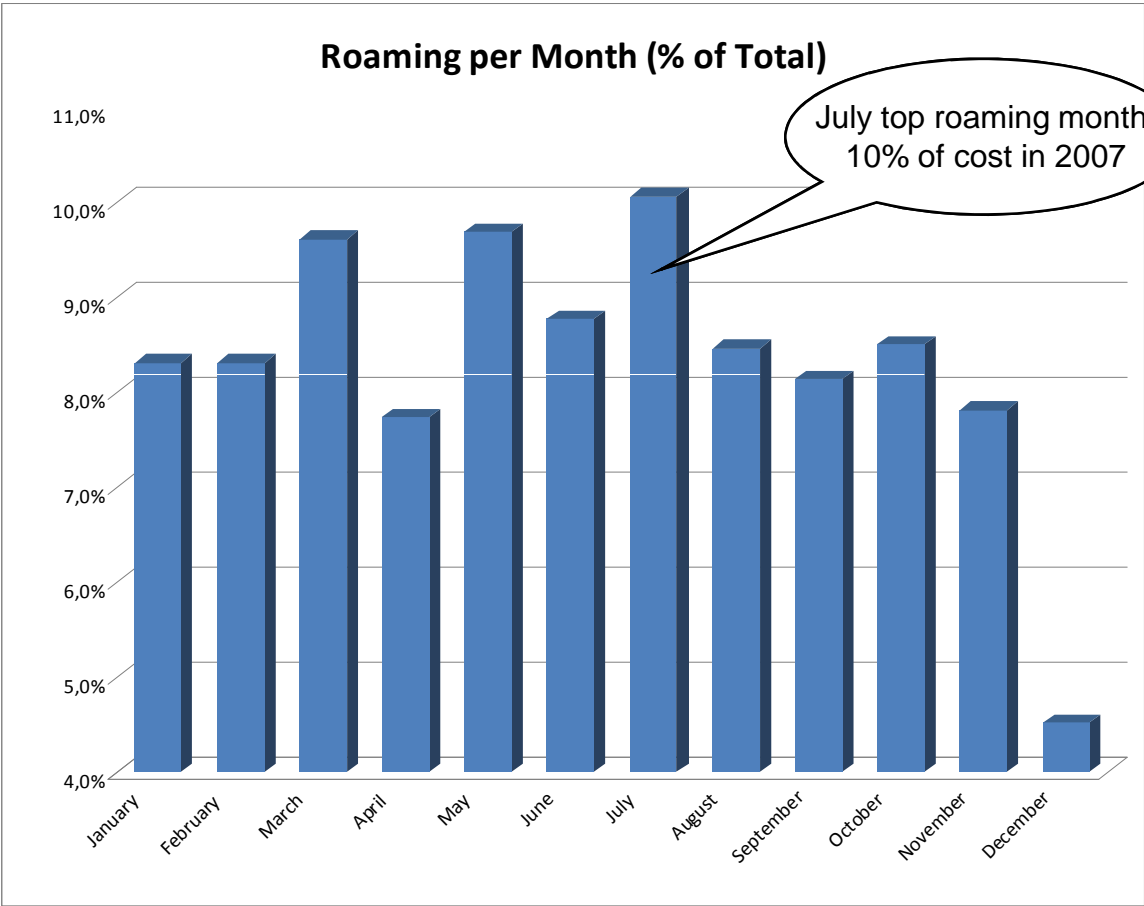
- An average national mobile call lasts 2,5 minutes
- Duration of roaming calls have increased by 7% in 2007. Are callers becoming less worried about costs?
- International calls are 50% longer than national calls.

Private vs Business spend



- Private usage is growing; YoY change (2006-2007): 8,3%
- July is the top “private spend” month reflecting 33.2% of costs

Roaming



	2007	
USA	11,7%	
Belgium	11,3%	
Germany	10,6%	
France	9,4%	
UK	8,5%	
Spain	3,6%	
Italy	3,5%	
India	3,1%	
China	2,2%	
Switzerland	2,2%	
	jul-07	
France	14,1%	
USA	10,5%	
Germany	9,6%	
Belgium	9,2%	
UK	8,7%	
Italy	5,6%	
Spain	4,6%	
India	2,6%	
China	2,5%	
Switzerland	2,3%	

SMS

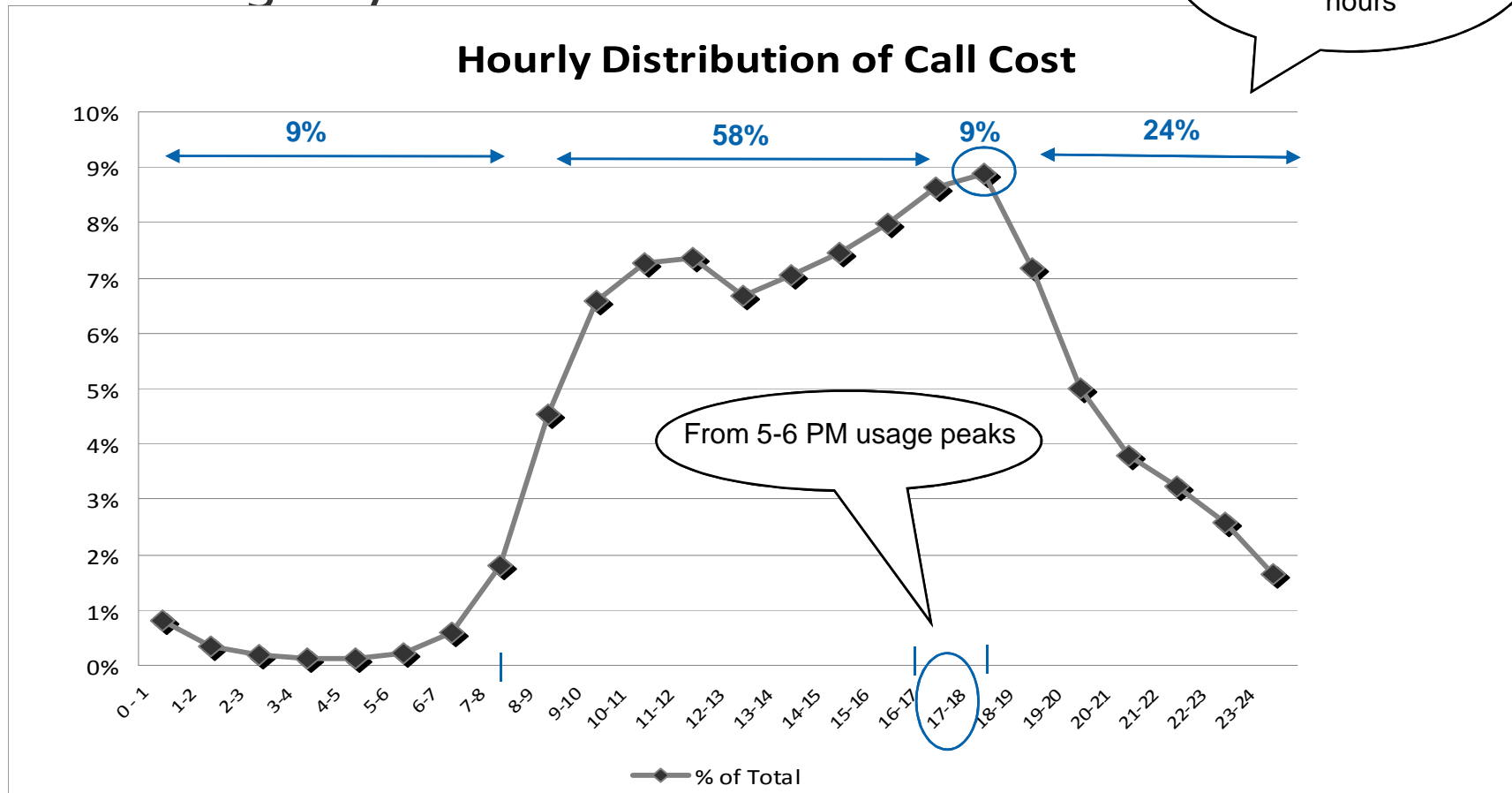
Top 4 days in 2007 with highest SMS cost:

1. 01-1-2007: Happy New Year!
2. 11-9-2007: 9/11??
3. 18-1-2007: Hurricane Weather across Europe
4. 14-2- 2007: Happy Valentine

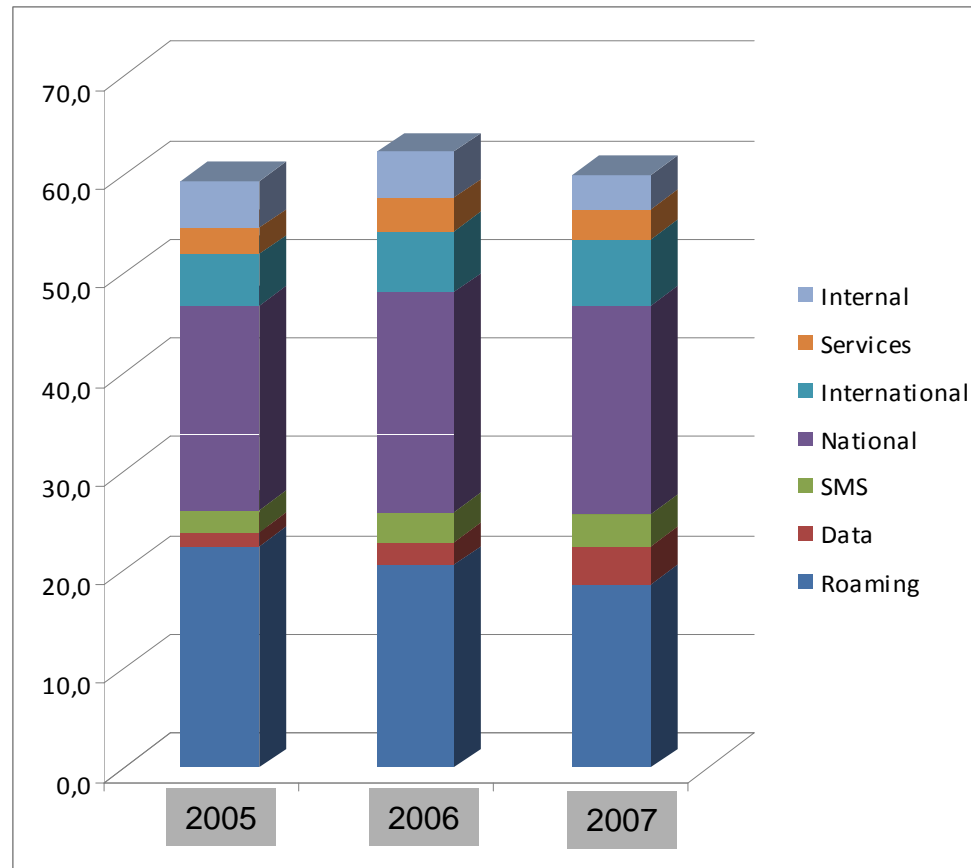
The no.1 day with least SMS volumes: **Xmas**

Calling Cost - time of day

Working day cost distribution



Average Revenue Per User (ARPU)



- ARPU is stable
- Roaming costs continue to decline, impact of EU compared to competitive tariffing no clear proofpoints.
- Internal cost decline strongly, the aggressive operator on-net tariffs
- Data and SMS has grown in popularity over the past years



Please contact Ezwim for more information