EUROBAROMETER

Candidate Countries Eurobarometer

CONSUMERS' OPINIONS ON SERVICES OF GENERAL INTEREST

PUBLIC OPINION IN THE ACCEDING AND CANDIDATE COUNTRIES

Fieldwork: June-July 2003

REPORT

This survey was requested by the European Union Directorate General **Health and Consumer Protection** and coordinated by the Directorate General **Press and Communication**

This document does not represent the point of view of the European Commission.
The interpretations and opinions contained in it are solely those of the authors.

Candidate Countries Eurobarometer 2003.3 - *Magyar Gallup Intézet*

Key findings

This Candidate Countries Eurobarometer (CCEB) special report on Services of General Interest, requested by DG SANCO in the 10 candidate countries that will join the European Union in May 2004 ("acceding countries") - Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovak Republic, Slovenia - (Wave CCEB 2003.3, 9,079 people interviewed face-to-face between 16th of June and the 18th of July, 2003) reveals:

- Access to most of services of general interest is generally easy for consumers in the acceding countries. Electricity supply, postal services, and water supply are the most easily accessible services, while relatively few consumers have easy access to inter-city rail services. While "easy access" to fixed telephone services reaches a lower level in the acceding countries than in the EU-15 countries, access to gas supply services is easier. There are no rail services in Malta and Cyprus, and the latter also lacks gas supply services.

- Overall, consumers are fairly or very satisfied with the service they receive from providers of services of general interest. However, levels of dissatisfaction are noticeable in all sectors and, in particular, for inter-city rail services and fixed telephone services. Electricity supply service providers are considered to offer the best quality of service and the best customer service. Taking all quality aspects into account (price, quality, information, contracts, customer service), postal services score the highest among the services of general interest.

- Regarding consumer satisfaction in general, there is an almost negligible difference between the acceding countries and the EU-15 countries.

- The only systematic difference that the Eurobarometer survey was able to identify between acceding countries and EU-15 countries concerns fixed and mobile telephone services. Consumers in the Baltic and Central European countries are much less satisfied with the contract conditions, prices, and in relative terms, with the service quality of their fixed or mobile telephone providers.

- Very few people did lodge a complaint about the services of general interest under investigation, but many of those who did so remain unsatisfied with how their complaint was handled.

- Finally, the opinions we examined seemed to be in general at least as dependent upon the respondent themselves as the actual provider examined. In other words, those who are satisfied with one particular service are very likely to be satisfied with other services as well, and vice versa.

Background

The Candidate Countries Eurobarometer (CC-EB) gathers information from the societies that are to become members of the European Union in a way that is fully comparable with the Standard Eurobarometer. The CC-EB continuously tracks support for EU membership in each country, and records attitudes related to European issues.

This report covers the results of the wave of surveys conducted in June and July 2003, in the 10 candidate countries that are to join the EU in May 2004: Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia.

An identical set of questions to the ones asked to consumers in the European Union in 2002[1] was asked of representative samples of the population aged 15 years and older in each candidate country. The sample size in Candidate Countries Eurobarometer surveys is at least 1,000 people per country, except for Cyprus and Malta, in which the sample size is 500 respondents each. The achieved sample sizes of the 2003.3 wave are:

Cyprus	500	Latvia	1004	Slovakia	1061
Czech Rep	1000	Lithuania	1004	Slovenia	1000
Estonia	1007	Malta	500		
Hungary	1003	Poland	1000	Total	9079

The survey is carried out by national institutes associated with and coordinated by The Gallup Organization, Hungary, in each of the candidate countries. This network of institutes was selected by tender. All institutes are members of the "European Society for Opinion and Marketing Research" (ESOMAR) or comply with its standards.

The figures shown in this report are weighted by sex, age, region, community size, education level and marital status. The figures given for the 2004 member states (2004 MEMBERS) as a whole are weighted on the basis of the 15+ population in each country.

Due to the rounding of figures in certain cases, the total percentage in a table does not always add exactly to 100%, but to a number very close to it (e.g., 99% or 101%). When questions allow for several responses, percentages often add to more than 100%. Percentages shown in the graphics may display a difference of 1 percentage point in comparison to the tables because of the way previously rounded percentages are added.

Types of surveys in the Eurobarometer series

The European Commission (Directorate-General Press and Communication) organizes general public opinion, specific target group, as well as qualitative (group discussion, in-depth interview) surveys in all member states and, occasionally, in third countries. There are four different types of polls available:

- Traditional standard Eurobarometer surveys with reports published twice a year
- Telephone Flash EB, also used for special target group surveys (e.g., Top Decision Makers)
- Qualitative research ("focus groups"; in-depth interviews)
- Candidate Countries Eurobarometer

The face-to-face general public standard Eurobarometer surveys and the EB Applicant Countries surveys, the telephone Flash EB polls and qualitative research serve primarily to carry out surveys for the different Directorates General and comparable special services of the Commission on their behalf and on their account.

The Eurobarometer Web site address is:
http://europa.eu.int/comm/public_opinion

[1] Eurobarometer 58.0 Autumn 2002. The results are available on the website of the Directorate-general health & consumer protection of the European Commission at http://europa.eu.int/comm/consumers/cons_int/serv_gen/cons_satisf/index_en.htm

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Introduction

In this report we describe the consumer satisfaction with services of general interest in the candidate countries that will join the European Union in May 2004. In this report, these countries, when considered as a whole, will be named "acceding countries". The Member States of the European Union at the time of redaction of this report (December 2003), when considered as whole will be named "EU-15 countries". We will focus on eight services of general interest:

- *mobile telephone services / providers*
- *fixed telephone services / providers*
- *electricity supply services / providers*
- *gas supply services / providers*
- *water supply services / providers*
- *postal services / providers*
- *providers of transport services within towns-cities*
- *providers of rail services between towns-cities*

We were specifically interested in the following aspects of these services and service providers:

- *whether access to services is easy or difficult*
- *whether pricing for services is fair, unfair or excessive*
- *how is perceived the quality of services*
- *how is perceived the clarity of information (bills, contracts, advertising, tickets, leaflets, etc.) received from service providers*
- *whether the conditions of the contracts with service providers are fair or unfair*
- *whether any complaint was made to any complaint-handling body or to any service provider in the last 12 months*
- *whether this complaint was dealt with very well, fairly well, fairly badly or very badly*
- *how is perceived the quality of customer service from the service providers*

We will analyse these questions one by one in each of the service areas later in the report, but first we introduce some "rules" or patterns that appeared in our data. It seems that individual respondents' assessments of the various services are highly interdependent. It is rather interesting to see that within each topic, the "answers" regarding the different services or service providers are positively associated[2]:

Quality of access is similar across different services.

Those who say a certain service is easy to access have a higher probability of saying the same for other services. Those who say a service is difficult to access show a higher probability of saying the same for other services as well (the lowest correlation is measured between accessibility of *mobile telephone services* and *rail services* -- 0.131**; and the highest one is between accessibility of *electricity supply services* and *water supply services* -- 0.584**).

[2] We measured the association with Pearson correlations; all correlations are significant at the 0.01 (**) or 0.05 (*) levels. All but three questions/variables are nominal variables, and in most of the cases we find associations among all of them -- certainly, after we recode all variables in the "same direction." This is almost completely true, if we split our analysis by the countries: the same associations exist within individual countries as well.

Price assessment is rather a function of the individual's purchasing power and therefore not very differentiated for the different services

Those who consider the price they pay for a service to be fair are more likely to consider the prices paid for all other services fair, and vice versa: those who consider a service price to be unfair have a higher probability of considering other service prices to be unfair as well (the lowest correlation is measured between fairness/unfairness of prices paid for *mobile telephone services* and *water supply services* -- 0.272**; and the highest between fairness/unfairness of prices paid for *electricity supply services* and *gas supply services* -- 0.639**).

There seems to be a sense of general service quality that affects perceptions of the individual services and providers

Those who consider the quality of a certain service to be very good or fairly good are more likely to consider the quality of all other services to be very good or fairly good, and by the same token, those who say the quality of a service is very bad or bad say the quality of all other services is bad or very bad (the lowest correlation is measured between quality of *mobile telephone services* and *transport services within towns* -- 0.271**; and the highest between quality of *electricity supply services* and *gas supply services* -- 0.788**).

Satisfaction with service-related information seems to relate to respondents' background rather than specific service providers.

If the respondent finds the information received from a service provider to be clear, it is more likely that he or she will find the bills received from all other providers to be clear. If the respondent finds the information received from a provider to be unclear, he or she will find all others' information to be unclear, too (the lowest correlation is measured between clarity of information received from *mobile telephone service* and *postal service* providers -- 0.315**; or between *fixed telephone service* and *urban transport service providers* -- 0.315**; and the highest between the clarity of information received from *urban transport services* and *inter-city rail services* providers -- 0.725**).

Fairness of contract conditions with service providers do not vary by services

Those who consider fair the conditions of their contract with a service provider, are more likely to consider the conditions of contracts with all other providers, and vice versa, those who consider unfair their contract with a certain provider, is more likely to consider unfair all other contracts (the lowest correlation is measured between fairness/unfairness of contracts with *mobile telephone service* and *transport services providers* 0.304**, and the highest between the *electricity supply service* and *gas supply service providers* 0.784**)

Certain people are more likely to complain about services

Respondents who personally made a complaint -- either to any complaint-handling body or to the service provider -- about any aspect of a certain service are more likely to make complaints about any aspect of all other services. Those who didn't make complaints regarding any aspect of a certain service are unlikely to do so regarding all other services (the lowest correlation is measured between *mobile telephone service* and *electricity supply* services -- 0.159**; and the highest between *transport services* and *rail services* -- 0.382**).

Individual service quality evaluations are at least partly derivatives of general service quality perceptions of individuals

Looking at the quality of customer service, we can say that respondents who consider a given entity to offer a very good or fairly good customer service are more likely to consider the other service providers to be very or fairly good, too, as regard customer service. On the other hand, respondents who say the customer service of a certain provider is very bad or fairly bad are more likely to say so in relation to all other service providers (the lowest correlation is measured between the quality of

customer services from *mobile telephone service* and *inter-city rail services* providers -- 0.271**; and the highest between *electricity supply* and *gas supply* services -- 0.814**).

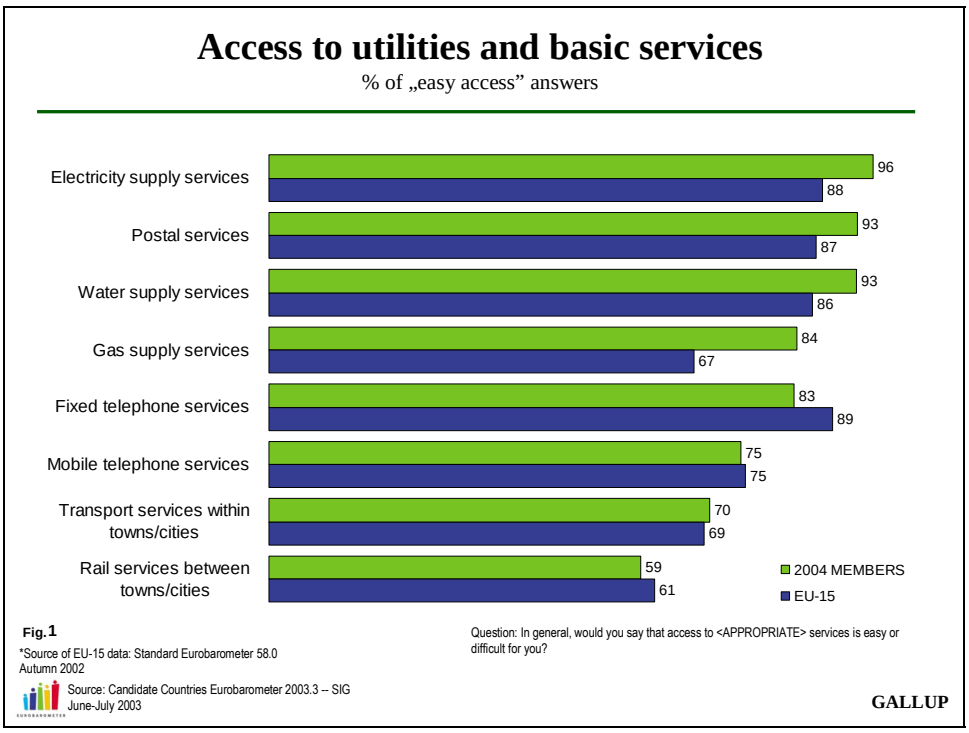
We were also interested in the *attributes* that drive the perception of quality of services. Using linear regression analysis, we find the following results:

- The quality of *mobile telephone services* is driven by the general quality of the customer service at the provider (standardized beta coefficient – that shows the strength of the casual relationship between the dependent variable, "quality", and those attributes that drive it lo a lesser or a greater extent – equals 0.506), by the fairness of contract (β=0.228) and by the fairness of prices (β=0.169).
- The quality of *fixed telephone services* is "determined" only by the quality of the customer service of the provider (standardized beta coefficient =0.306).
- The perception of *electricity supply services* as being high quality is a result of a positive evaluation of the general quality of the provider (standardized beta coefficient =0.414), by its easy accessibility (β=0.209) and fair prices (β=0.194).
- The quality of *gas supply services* is driven purely by the fairness of its prices (β=0.389).
- The quality of *water supply services* is the best – customers are satisfied with the service provided in general (standardized beta coefficient = 0.409) and with its easy accessibility (β=0.218).
- The quality of *postal services* is driven by the quality of customer service provided (standardized beta coefficient = 0.373), by the fairness of the terms and conditions (β=0.222) and by the fairness of prices (β=0.162).
- The quality of *transport services within towns/cities* is not significantly determined by any of the attributes analyzed here.
- The quality of rail services between towns/cities is mostly driven by the general quality of customer service provided (standardized beta coefficient = 0.340), by the clarity of information received from the service providers (β=0.309), by the respondent's attitude about how the complaint-handling body or the service provider handled his or her complaint (β=0.302) and by the fairness of its prices (β=0.222).

And now let us take a look at the different service attributes, one by one.

1. Access to services

In this chapter, we take a very detailed look at the access to mobile telephone, fixed telephone, electricity supply, gas supply, water supply, postal, transport and rail services. For a quick introduction, *FIGURE 1* presents the rank order of the services in terms of the ease of their access in the acceding countries an in the EU-15. (see also *ANNEX TABLE 1.1a*).



Electricity is the most widespread utility with virtually full penetration in the acceding countries (96%), followed by postal services and water (93% both). The most accessible utility in the EU is the fixed telephone (with 89% of current EU consumers having easy access to it), which ranks only fifth in the acceding countries with somewhat less people claiming easy access (83%). We find a big difference in terms of household gas service. This utility is easily accessible for 84% in the acceding countries, but only for two thirds (67%) in the EU-15.

Exactly the same proportion, three quarters (75%) in the EU-15 and in the acceding countries have easy access to mobile telephone service.

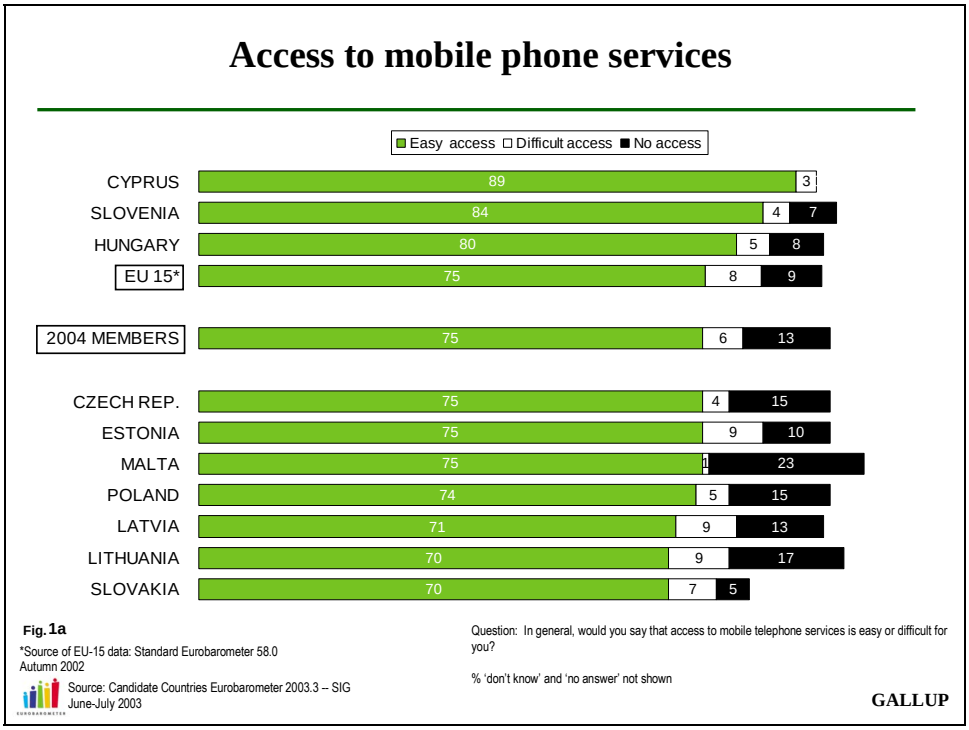
Relatively few, only about six in ten consumers in both parts of Europe have easy access to rail service (59% in the 2004 members and 61% in the current member states). As one would expect, about the same percentage, seven out of ten consumers have easy access to public transport — the rest lives in rural areas where public transport does not operate at all.

Access to mobile telephone services

Three-quarters of the acceding countries (75%) say, in general, they have easy access to mobile telephone services. There are only 6% who say the opposite, and 13% have no access to this kind of service. There are no differences regarding accessibility of mobile telephone services in the EU, but 8% say it is difficult to access and 9% say there is no access to mobile telephone services.

As *FIGURE 1a* shows below, Cypriots (89%), Slovenians (84%) and Hungarians (80%) are the likeliest to say they have easy access, and Slovakians, Lithuanians (70% each) and Latvians (71%) are the least likely to agree.

The Maltese are the most likely to say they have no access to mobile telephone services (23%).



Looking at the demographic variables, managers (94%), students (92%) and 15- to 24-year-olds (91%) have the highest percentages who say that access to mobile telephones is easy, and those who left school at 15 (44%) have the lowest percentages.

Those who finished school at 15, those being 55 and older and the retired (27% each) are the least likely to say they have access to mobile telephone services. (*ANNEX TABLE 1.1b*)

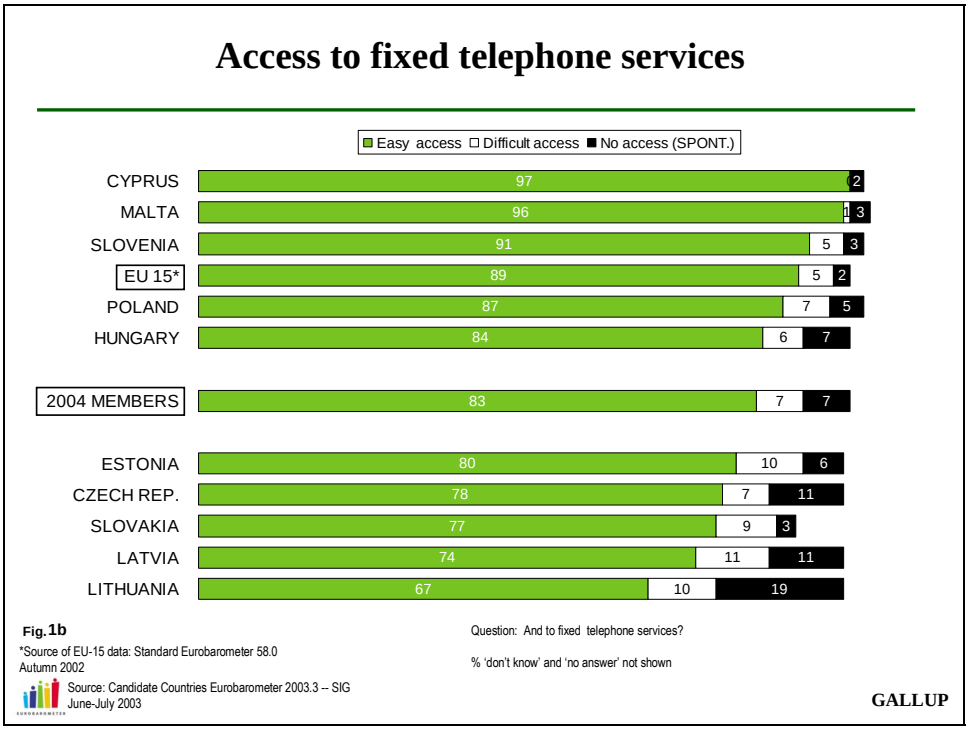
Access to fixed telephone services

Eighty-three percent in the acceding countries say they have easy access to fixed telephone services, and only 7% each say their access is difficult, or is impossible, to obtain.

More people in the EU-15 than in the acceding countries think fixed telephone services are easy to access, and fewer think they are difficult (5%) or impossible (2%) to access.

It is easy to obtain access to fixed telephone services for the vast majority of respondents in Cyprus (97%), Malta (96%) and Slovenia (91%), but easy access is not as widespread in Lithuania (67%) and Latvia (74%). These last two countries, along with Estonia (10%), have the highest percentages of those who say access to fixed telephone services is difficult to get (10% and 11%, respectively).

Lithuania has the highest percentage of people saying they have no access to fixed telephone services (19%).



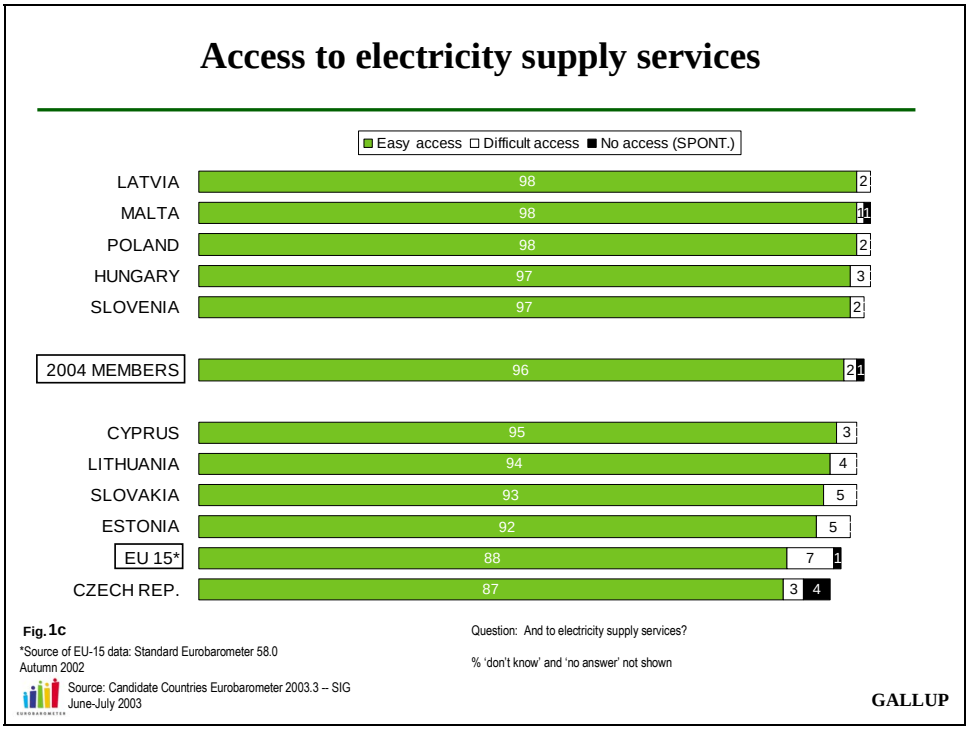
As was the case for mobile telephone services, managers (92%), those who finished their education at their 20 or older (90%) and the self-employed (90%) are likeliest to say fixed telephone services are easy to access. Those who finished their education at or before the age of 15 (72%) and the unemployed (78%) are the least likely to say access is easy to get, and they have the highest percentages of respondents saying they have no access at all to fixed telephone services (13% and 12%, respectively). For more detailed information, refer to *ANNEX TABLE 1.2a.*

Access to electricity supply services

Access to electricity is more universal in the acceding countries than in the current member states. Almost everybody from these countries says electricity supply services are easy to access (96%). Only 2% of respondents say it is difficult to access these services, and 1% says they have no access at all.

Regarding the easy accessibility of electricity supply services, the numbers from the EU-15 (88%) are lower than in acceding countries (96%). Seven percent in the EU say these services are difficult to access, and 1% says they have no access at all. (See *ANNEX TABLE 1.3a*)

As can be seen from *FIGURE 1c*, electricity supply services are easy to access in every country, especially among the Latvians, Poles and Maltese (98% each). Czechs have the least access (87% easy access and as many as 4% claiming they have no access at all).



There is a very low variation among demographic segments: access to electricity is universal. Again, managers (98%), those who left school at 20 or older (97%), the self-employed (97%) and 25- to 39-year-olds (97%) are more likely to say it is easy to access electricity supply services. Those aged 15-24 and house persons are least likely to give this answer (93% for each).

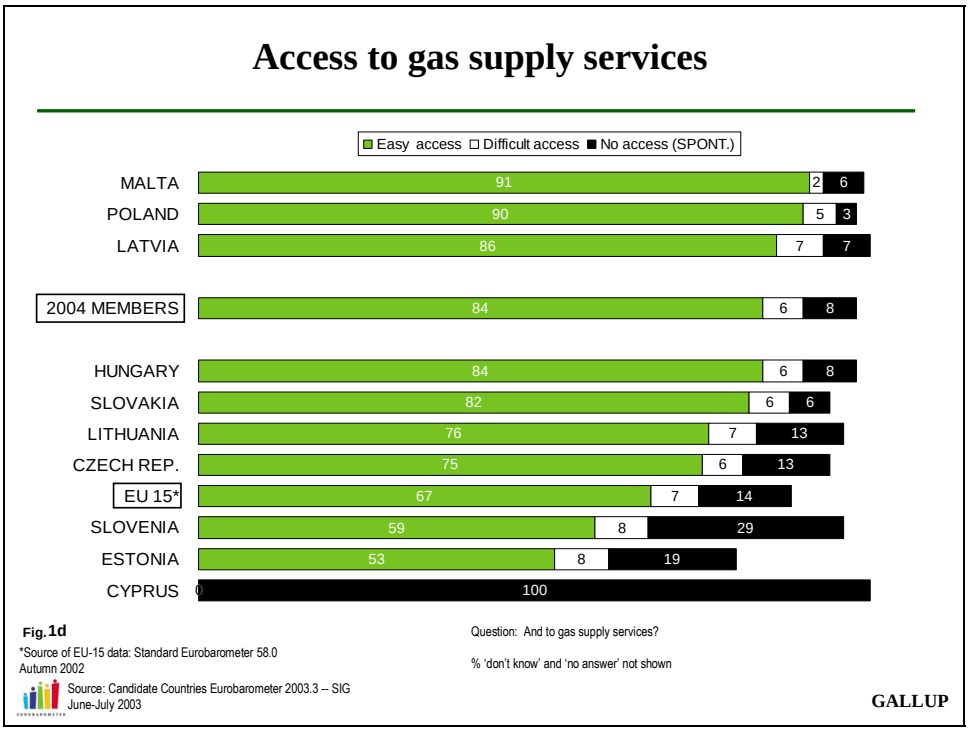
There are few mentions by various demographic groups of "difficult to access" (1%-5%) or "no access" answers (0%-2%) regarding electricity supply services. For more detailed data, see *ANNEX TABLE 1.3b.*

Access to gas supply services

In Cyprus, there are no public gas supply services; Cypriots use different energy sources for heating / cooling and other household energy usage.

Eighty-four percent in the acceding countries say it is easy to access gas supply services; 6% think it is difficult; and 8% say there is no access at all. In the EU, only 67% have easy access to gas supply services, 7% of them say access is difficult to get, and 14% say there is no access.

Access to gas supply services is easy for most of the Maltese (91%) and the Polish (90%), but is easy for far fewer Estonians (53%) or Slovenians (59%). Not considering the Cypriots, the Slovenians (29%) and Estonians (19%) have the most people with no access at all to gas supply services.



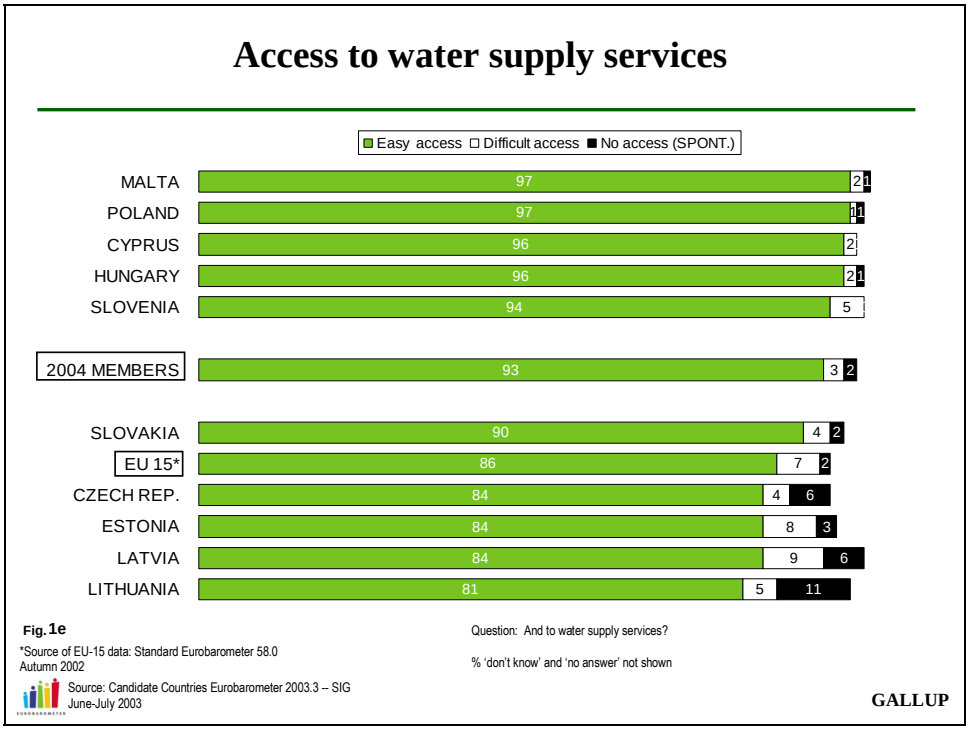
Those who finished their education at 20 or older (90%), managers (89%) and those in large towns (89%) are the groups with the highest percentages who say it is easy to access gas supply services. The lowest levels of agreement are found in rural areas or villages (76%), and among those who finished their education at 15 or younger (76%). Access is difficult for house persons (10%) to obtain, and there is no access at all for 13% of people in rural areas and villages and among those who left school at or before the age of 15 (13%). For more detailed data, see *ANNEX TABLES 1.4a-1.4b.*

Access to water supply services

The majority of acceding countries has easy access to water supply services. Almost everybody, 93% of the population, says the accessibility of water supply services is easy, 3% say it is difficult, and only 2% indicate they have no access to it at all.

Only 86% of the EU-15 countries' population say access to water supply services is easy to get. It is difficult for 7% of the population and 2% say there is no access to this kind of service.

On the country level, as can be seen in *FIGURE 1e*, access is easy for almost everyone in Malta and Poland (97% each), but easy access is not as widespread in Lithuania (81%); more than anyone else, Lithuanians (11%) say they have no access at all to water supply services.

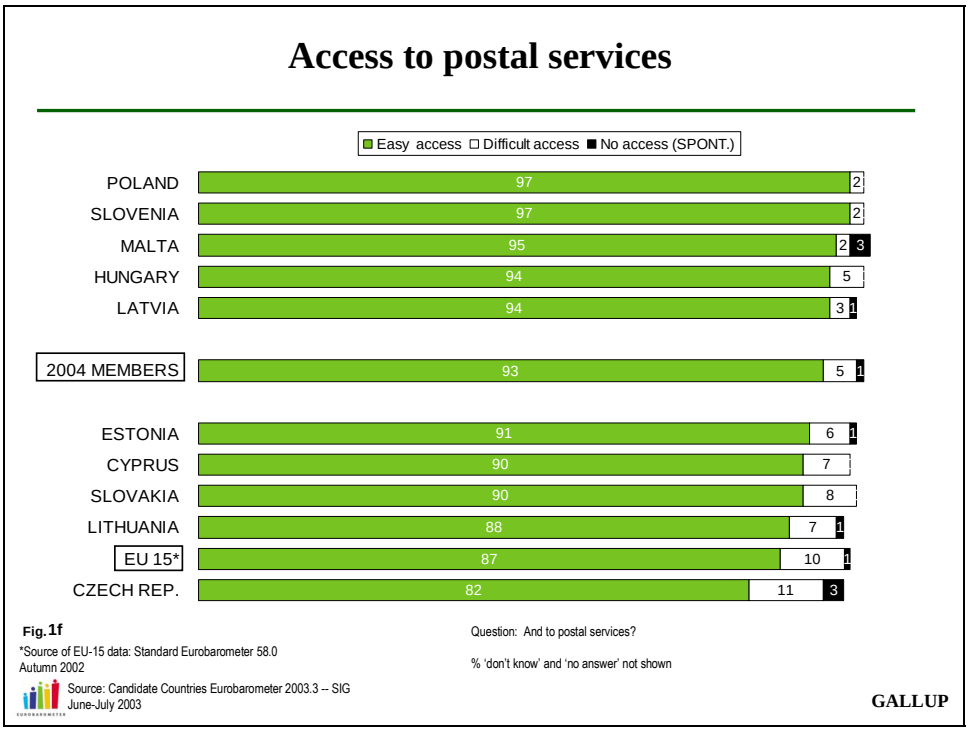


Water supply services are easiest to get in large towns (96%), and among managers (96%) and those who finished their education at 20 or older (95%). In rural areas or villages, the lowest percentages of respondents agree (90%) that access to water supply services is easy. There are only a few demographic groups who mention that access is difficult or that there is no access at all to water supply services (0%-4%). For more detailed data, see *ANNEX TABLES 1.5a-1.5b.*

Access to postal services

93% of the acceding countries' population says the accessibility of the postal services is easy, 5% say access is difficult, and 1% indicates they have no access to postal services. In the EU-15 countries, only 87% say it is easy to access postal services, 10% say it is difficult and 1% says there is no access.

The countries with the highest percentages of easy postal access, 97%, are found in Poland and Slovenia. The lowest number, 82%, is in the Czech Republic. The Czech population also mentions in the highest numbers that the access is difficult to postal services (11%).



Postal services are easy to access for managers (95%), the unemployed (95%) and 25- to 39-year-olds (95%), but only 91% of house persons agree -- and 8% say such services are difficult to get. There are few mentions by demographic groups of "no access" answers (0%-2%). For more information, see also *ANNEX TABLES 1.6a-1.6b.*

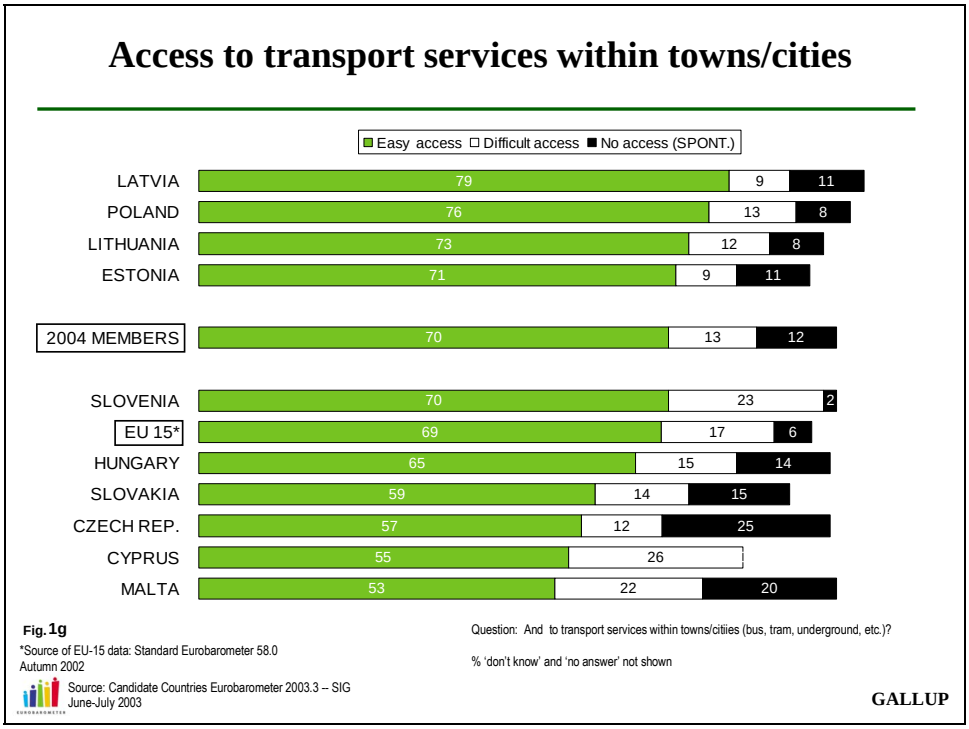
Access to transport services within towns/cities

In the acceding countries, fewer people have easy access to transport services within towns or cities than they do to the other mentioned services. Seventy percent of the population say they have easy access, as do 69% in the EU-15.

Transport services within towns or cities are difficult to access for 13% of the acceding countries and for 17% in the EU-15 countries. Twelve percent in the acceding countries and only 6% in the EU-15, say there is no access to transport services within towns or cities.

The Latvians (79%), Polish (76%) and Lithuanians (73%) are likeliest to claim easy-to-access transport services within towns or cities, and the Maltese (53%), Cypriots (55%) and Czechs (57%) are the least likely.

Twenty-six percent of Cypriots, 23% of Slovenians and 22% of Maltese say it is difficult for them to access these services. Czechs (25%) and the Maltese (21%) are the most likely to say they have no access at all to transport services.



It is easy to access the transport services in large towns (89%), but obviously, only the half of the rural area population (52%) agrees. More than anyone else, the rural population and house persons (19% each) say it is difficult for them to access transport services. Also, the rural population (23%) and those who left school at 15 or before (20%) mention most frequently that they have no access at all to transport services. For more, see *ANNEX TABLES 1.7a-1.7b.*

Access to rail services between towns/cities

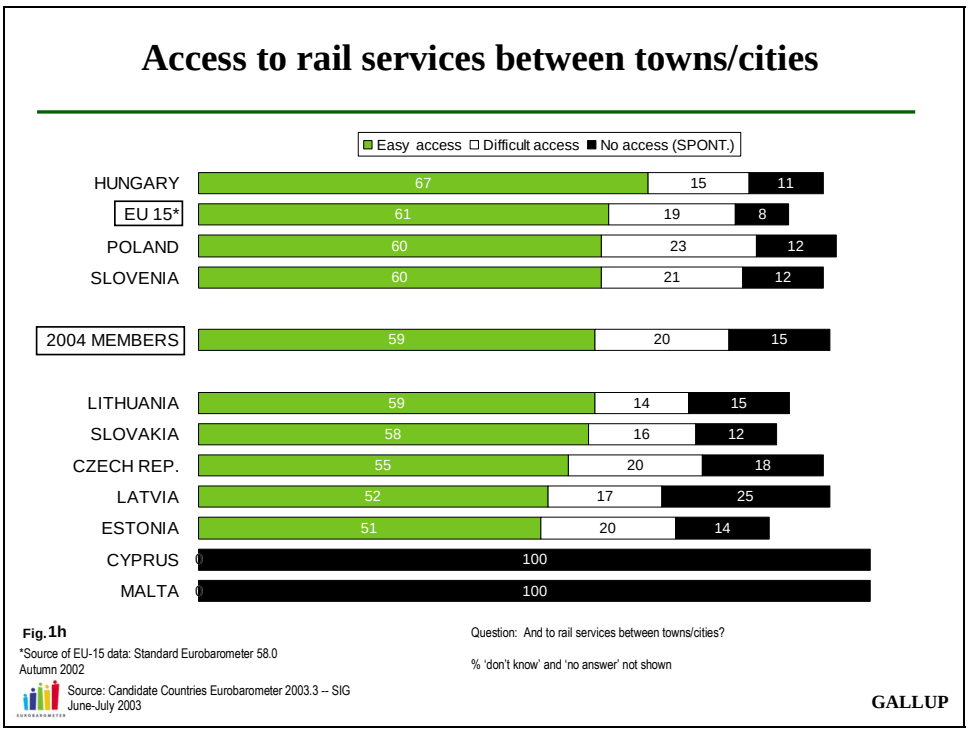
Fewer people say access to rail services between towns/cities is easy compared to transport services within towns/cities. Compared to what respondents say about other services, very few -- only 59% -- from the acceding countries say access to rail services between towns or cities is easy. In Cyprus and Malta, there is no access to rail services between towns or cities.

One in five (20%) in the acceding countries say it is difficult to get rail services between towns/cities, and 15% say there is no access at all.

Besides telephone service, the only other service that is easier to access in the EU than in the acceding countries is rail service. Sixty-one percent of the EU-15[3] population says it is easy to access the rail services between towns or cities; 19% say it is difficult; and 8% say there is no access.

A larger percentage of Hungarians (67%) than of people from the other acceding countries say it is easy to access rail services between towns; Estonians (51%), Latvians (52%) and Czechs (55%) agree least frequently. Twenty-three percent of Poles and 21% of Slovenians say it is difficult to access the rail services.

Not taking into account the Maltese and Cypriots, the highest percentage of people who say they have no access at all to rail services between towns or cities in their country is from Latvia (25%).



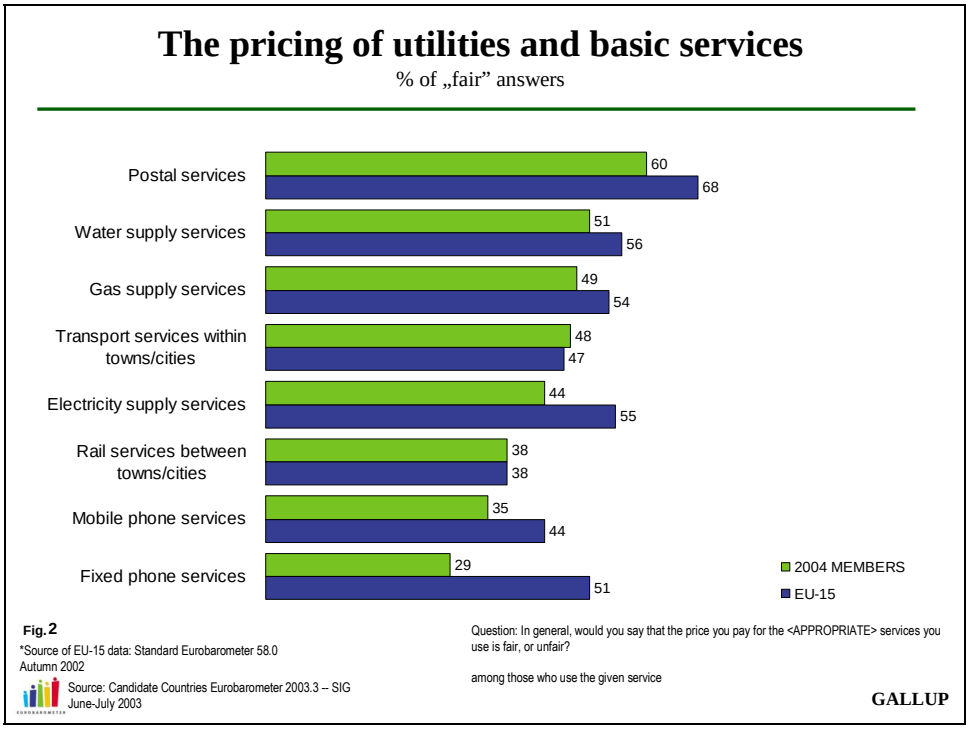
Those in large towns have the highest percentages of respondents with easy access (79%) to rail services between towns/cities; high percentages of students have easy access as well (72%). Those from the rural population are the least likely to say they have easy access (39%).

The rural population has the highest percentage of those with difficult access, 28%. Twenty-six percent of rural respondents, and one-quarter of house persons (25%), mention that there is no access at all to rail services between towns or cities -- the highest percentages for any demographic group. For more detailed data, see *ANNEX TABLES 1.8a-1.8b.*

[3] Standard Eurobarometer 58.0 Autumn 2002

2. Price of services

In this chapter, we look at whether the acceding countries consider fair, unfair or excessive (spontaneous answer) the price they have to pay for the eight services taken into consideration: mobile and fixed telephone services, electricity, gas and water supply services, postal services, and transport and rail services (see also *ANNEX TABLES 2.1-2.8*). First, on *FIGURE 2*, let us take a look how these services compare to each other.



Generally consumers in the EU-15 are more satisfied with the price level of the services of general interest and utilities, in six out of the eight services they express higher satisfaction levels compared to the respondents from the acceding countries.

Consumers in the EU-15 and in the acceding countries are equally most satisfied with how much value they get for their money in the case of postal services, with people in the EU-15 being more satisfied (68%) than those in the acceding countries (60%). Price satisfaction with water supply services comes in second, 51% in the 2004 member states and 56% in the current member states are satisfied with the price they need to pay for running water.

With half of the respondents (49%) claiming it fair, the price of gas service is the third best in the acceding countries, but lags behind compared to the EU-15, where 54% evaluate it positively. The prices of public transportation are evaluated similarly in the 2004 member states and in the current member states — in both regions about half of those who use them have a favourable view about the prices (CC: 48%, EU: 47%).

Electricity supply services are considered to be much better priced in the EU-15 (55% think the price they pay is fair) than in those countries that will join in 2004 (44%). Railway prices have exactly the same assessment in the acceding countries and in the EU-15 (38%), and as these numbers suggest, satisfaction is quite low in both regions. The same is true for mobile telephone services in the future member states; in that case however, the satisfaction is considerably higher in the current member states (44%) than in the future ones (35%).

The most dramatic difference is in the case of fixed telephony. Half of EU-15 consumers (51%) think their landline phones are priced fairly. In the candidate region (as we will see below in almost all countries) fixed telephone is considered to be the worst priced utility service, with only 29% (on average) agreeing that the money they spend for it is in balance with the service they receive.

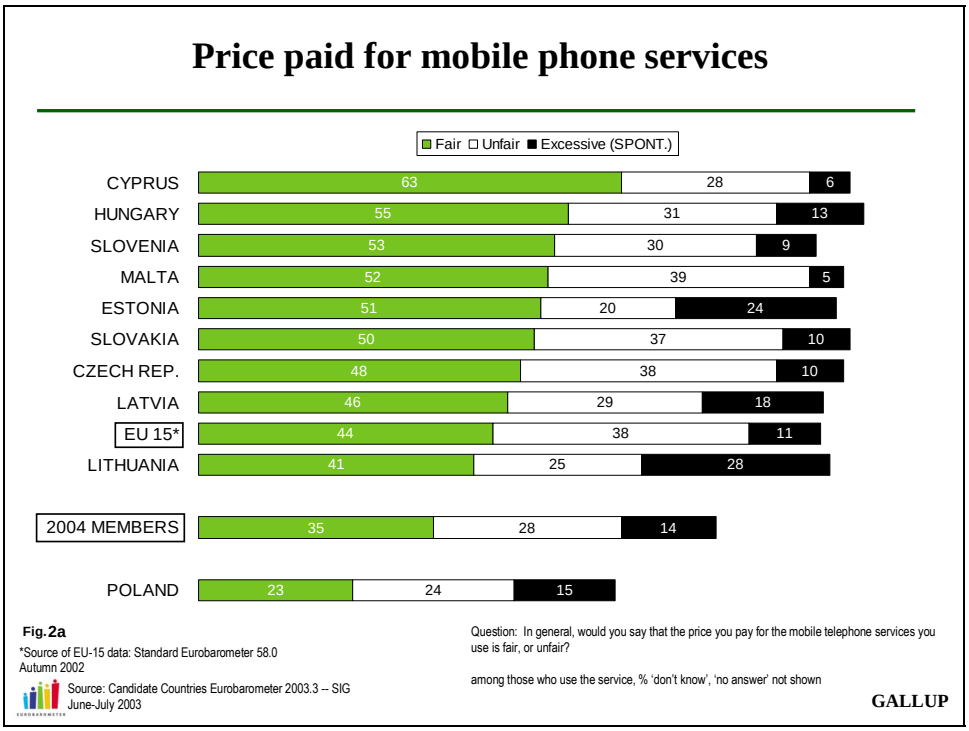
The price paid for mobile telephone services

Only slightly more than one-third (35%) of the acceding countries' population say the price they pay for mobile telephone services is fair, and little more than one-quartered in five consider it unfair (28%). Every seventh person says the prices charged for this service are excessive (14%).

We can see a rather different picture if we look at the numbers from EU-15 countries. Forty-four percent of the population finds the prices they pay for mobile telephone services to be fair, but the percentage of those who say the prices are unfair is higher, too (38%), than the percentage for 2004 members. Eleven percent of the EU-15 population considers the prices excessive.

As *FIGURE 2a* shows below, Cypriots (63%), Hungarians (55%), Slovenians people (53%) and are the likeliest to say the prices paid for mobile telephone services are fair, and the Polish say so the least frequently (23%).

The Maltese (39%), Czechs (38%), and Slovakians (37%) say that the prices are unfair – the highest percentages giving this answer. Estonians have the lowest rate of agreement (20%). But, after Poland, Estonia also has the highest percentage of people saying the prices for mobile telephone services are excessive (24% and 20%, respectively). (see *ANNEX TABLE 2.1a.*)



Since as many as 31% among the Polish respondents refuse to answer this question (saying they "don't know"), we computed the distributions of the meaningful responses only (so that all 'fair, 'unfair, and spontaneous 'excessive' responses constitute the 100%), *TABLE 2a* shows the results.

Table 2a. Mobile telephone price satisfaction, proportion of meaningful responses only

	fair	unfair + excessive
CYPRUS	65	35
SLOVENIA	58	42
HUNGARY	56	44
MALTA	54	46
ESTONIA	53	47
SLOVAKIA	52	48
CZECH REPUBLIC	50	50
LATVIA	50	50
MS-2004	46	54
LITHUANIA	44	56
POLAND	37	63

Looking at the table above, it is probably clearer that there are two countries where more people are dissatisfied than satisfied with mobile telephone prices: Lithuania and Poland, while satisfaction and dissatisfaction is balanced in the Czech Republic and Latvia as well as in Slovakia, where a little more people are satisfied than dissatisfied. In the remaining countries a slight majority is satisfied with mobile telephone prices.

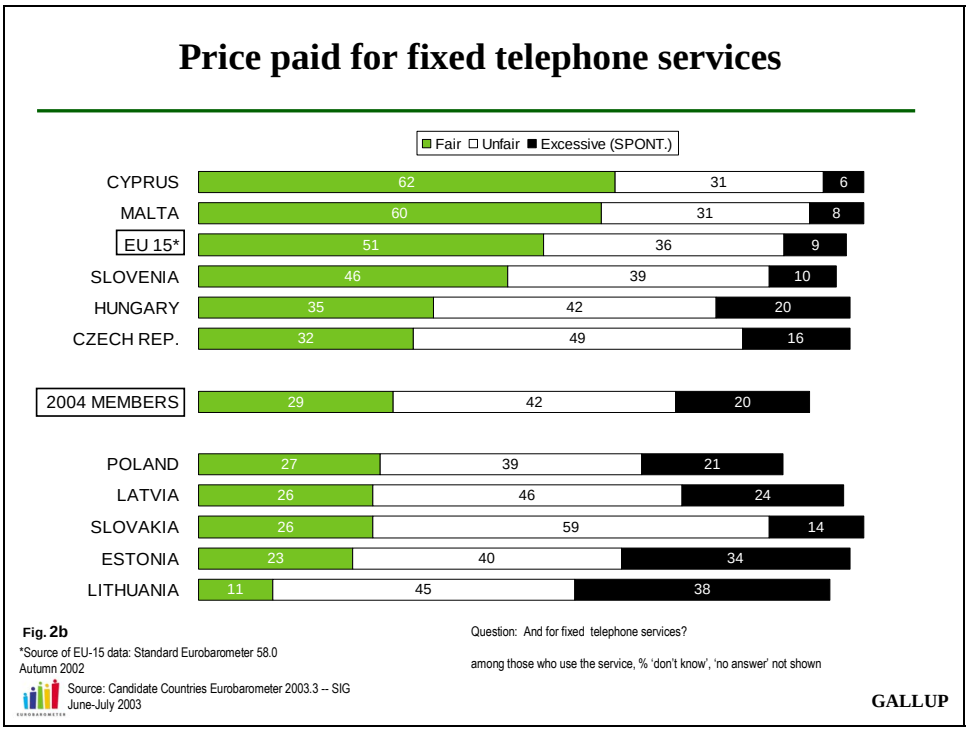
The 15- to 24-year-olds (44%), students (44%) and managers (43%) say in the highest proportions that the prices they pay for mobile telephone services are **fair**, while the retired (20%) and people 55 and older (21%) say so in the lowest proportions. Students (39%), white-collar workers (36%) and 15-to 24-year-olds (35%) have the highest proportions who consider the prices unfair. On the other hand, only 17% of those who left school at or before the age of 15, and 19% of the retired and of the older group, say mobile telephone services are priced **unfairly**. With almost a quarter being outraged, managers are the most likely to voluntarily characterize mobile telephone prices as "excessive" (23%). (*ANNEX TABLE 2.1b*)

The price for fixed telephone services

Consumers in the acceding countries are clearly heavily dissatisfied with fixed telephone prices with only 29 percent of the people saying that prices for these services are fair (which is the lowest rate among all other questions of this kind), 42% say they are unfair and 20% say they are excessive.

Half of the EU population says fixed telephone services' prices are fair (51%). Thirty-six percent say the prices are unfair and only 9% consider them excessive.

A lot of differences can be emphasized among the acceding countries. While 62% of Cypriots and 60% of the Maltese say the prices are fair, only 11% of the Lithuanians consider them so. Looking at those who consider the prices unfair, the Slovakians are in first place (59%), followed by the Czechs (49%) and the Latvians (46%). The Cypriots (31%) and Maltese (31%) say the least frequently that prices are unfair. Estonians (34%) and Lithuanians (38%) answer most often that prices are excessive.



Given that the proportion of those who were not willing to share their opinion, we again computed the proportions of the meaningful responses for a more accurate analysis. Looking at *TABLE 2b*, it very apparent that in all post-socialist countries the majority is dissatisfied with fixed telephone prices. In Estonia and Lithuania there are significantly more consumers who find fixed telephone prices excessive than those who find them fair.

Table 2b. Fixed telephone price satisfaction, proportion of meaningful responses only

	fair	unfair + excessive
CYPRUS	62	38
MALTA	61	39
SLOVENIA	48	52
HUNGARY	36	64
CZECH REP.	33	67
MS-2004	32	68
POLAND	31	69
LATVIA	27	73
SLOVAKIA	27	73
ESTONIA	24	76
LITHUANIA	12	88

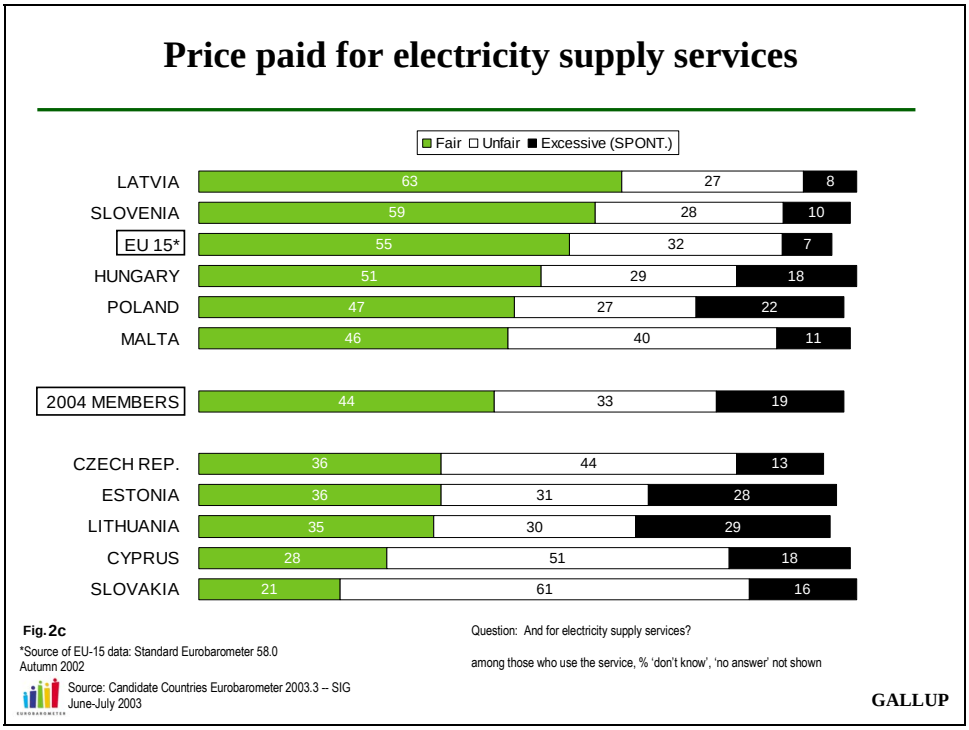
Finally, we take a look how different segments of the society evaluate fixed telephone prices in the acceding countries. Students and young people are most likely to say the prices of fixed telephone services are fair (38%) and the unemployed are the least likely (21%). Almost half (49%) of other white-collar workers say fixed telephone service prices are unfair, which makes them the group with the largest percentage who have this opinion, and the smallest group is those who left school at 15 or younger (36%). The large towns' population has the highest rate of reporting the prices to be excessive (26%), and students have the lowest rate (9%). For more detailed data, see *ANNEX TABLES 2.2a-2.2b.*

The price paid for electricity supply services

Less than half (44%) of the population in the acceding countries say the prices they pay for electricity supply services are fair, almost one-third (33%) say they are unfair and one in five say they are excessive (19%).

The percentage of people in the EU-15 who say the prices of electricity services are fair, 55%, is not much greater than that for the acceding countries, and 32% (the same percentage as in the acceding countries) say prices are unfair. Seven percent answered the prices for electricity supply services are excessive.

As *FIGURE 2c* below shows, Latvians (63%) and Slovenians (59%) are likeliest to say the prices are fair, and the Slovakians (21%) and Cypriots (28%) are the least likely. Slovakians are also likeliest to say electricity supply prices are unfair (with as many as 61%), followed by Cypriots (51%) and Czechs (44%). Lithuanians (29%) and Estonians (28%) are the most likely to consider the prices excessive.



Managers (54%) and students (50%) are the most likely to say the prices of electricity supply services are fair, and the unemployed are the least likely (33%). Manual workers, more than any other demographic group, say the prices are unfair (39%) and people from large towns are the likeliest to say prices are excessive (24%). For more, see *ANNEX TABLES 2.3a -2.3b.*

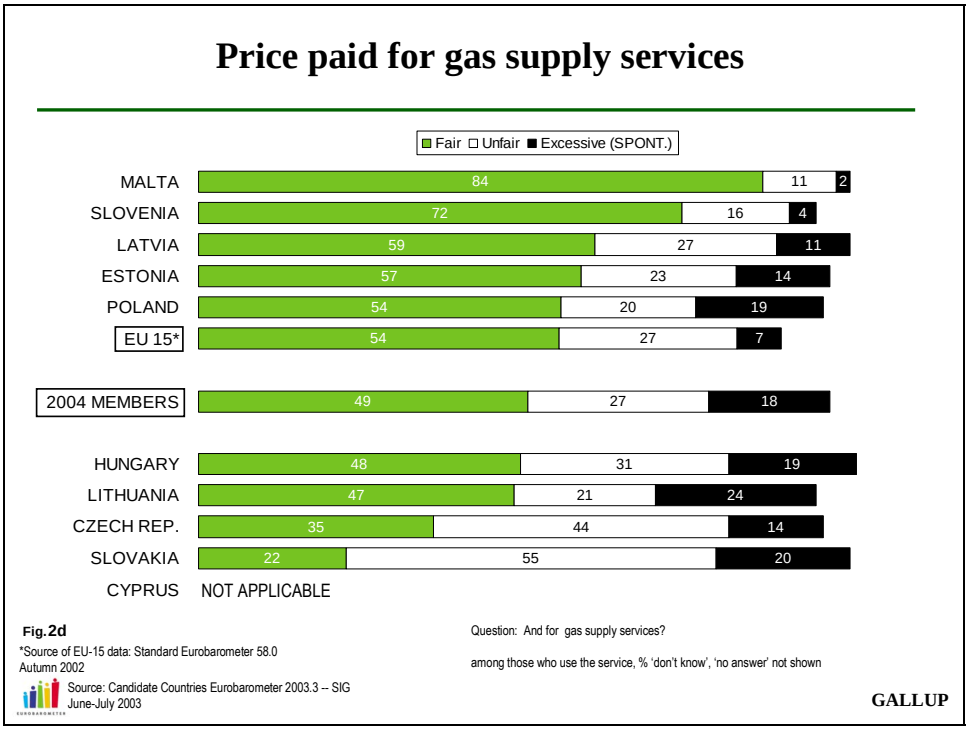
The price paid for gas supply services

Less than half of the other acceding countries' population, 49%, say the prices they pay for gas supply services are fair, a quarter of them consider the prices unfair (27%) and 18% say the prices are excessive. (As we explained above, this question is not applicable to Cypriots who have no public gas service.)

In EU-15 countries, 54% say the prices are fair, 27% say they are unfair and only 7% say the prices are excessive.

Looking at the individual countries, the Maltese (84%) most often say the prices are fair, followed by, at a much lower percentage, the Slovenians (72%) and Latvians (59%). The Slovakians are least likely to say (22%) that the prices are fair. More than half of the Slovakians consider the prices unfair (55%), as do 44% of Czechs. Maltese (11%), Slovenians (16%), and Lithuanians (21%) are least likely to say the prices are unfair.

Twenty-four percent of Lithuanians and 20% of Slovaks say the prices for gas supply services are excessive. The Maltese and Slovenians think so least (2% and 4%, respectively).



Managers and those whose education ended at the age of 20 or older report most often that prices for gas supply services are fair (58% and 56%, respectively), and the other white collars and manual workers are at the bottom of the scale (45% and 44%).

Manual workers are high on the list of those who consider the prices unfair (33%), managers and students are least likely to consider them unfair (21% each).

The retired, and the older generation say the prices they pay are excessive in the greatest numbers (22% for all), and students say the same in the lowest numbers (9%). For more detailed numbers, see *ANNEX TABLES 2.4a-2.4b.*

The price paid for water supply services

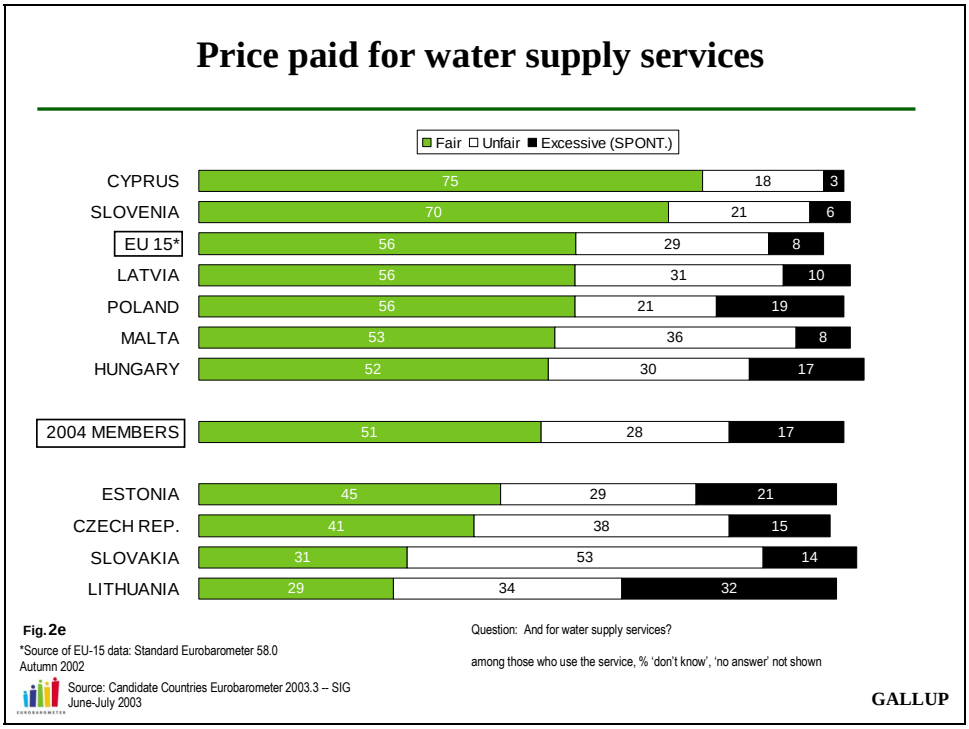
Most people, half the population of the acceding countries say the prices they pay for water supply services are fair (51%), a quarter say prices are unfair (28%), and a minority, 17%, say prices are excessive.

EU-15 consumers are a bit more likely than the acceding countries' population to find water service prices fair (56%), about as many find them unfair (29%), and fewer say they are excessive (8%).

In the acceding countries, more Cypriots (75%) and Slovenians (70%) than any other nationality say the prices are fair, and Lithuanians (29%) and Slovakians (31%) say so less than any other nationality.

Slovakians (53%), Czechs (38%) and Maltese (36%) say the prices of water supply services are unfair in the greatest numbers, and the Cypriots have the same opinion in lowest numbers (18%).

A very high proportion of Lithuanians (32%) voluntarily say the prices for running water are excessive in their country.



Managers are most likely to answer that the prices they pay for water services are fair (58%), followed by students, house persons and village people15- to 24-year-olds (57% for all). The unemployed, the people from large towns and those 55 or older are least likely to say the prices are fair.

The unemployed and manual workers (32% each are more likely than others to say the prices they pay are unfair, but students are least likely to agree (20%).

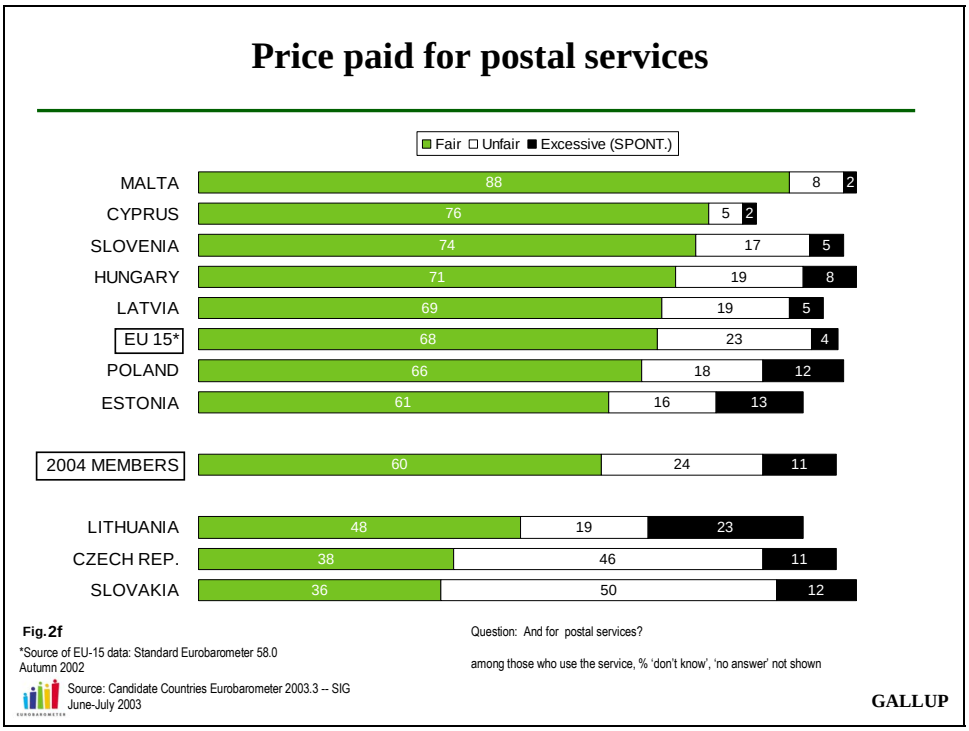
Twenty-two percent in large towns say the prices are excessive -- but this is not the prevailing opinion of students (9%). For more detailed data, see *ANNEX TABLES 2.5a-2.5b.*

The price paid for postal services

Sixty percent of the acceding countries' respondents say postal services' prices are fair. A quarter of them say the prices are unfair (24%) and 11% say they are excessive. Sixty-eight percent in the EU say the prices are fair, 23% say the prices are unfair and only 4% consider them excessive.

Malta (88%), Cyprus (76%) and Slovenia (74%) are the countries in which the highest percentages of respondents consider postal services' prices fair, and the Czech Republic and Slovakia (38% and 36% respectively) are the countries in which the lowest percentages consider them unfair.

Slovakians (50%) and Czechs (46%) are most likely to consider prices unfair, followed by Latvians, Lithuanians and Hungarians (19% each), though not closely. Lithuanians are the most likely to consider postal services' prices excessive (23%).



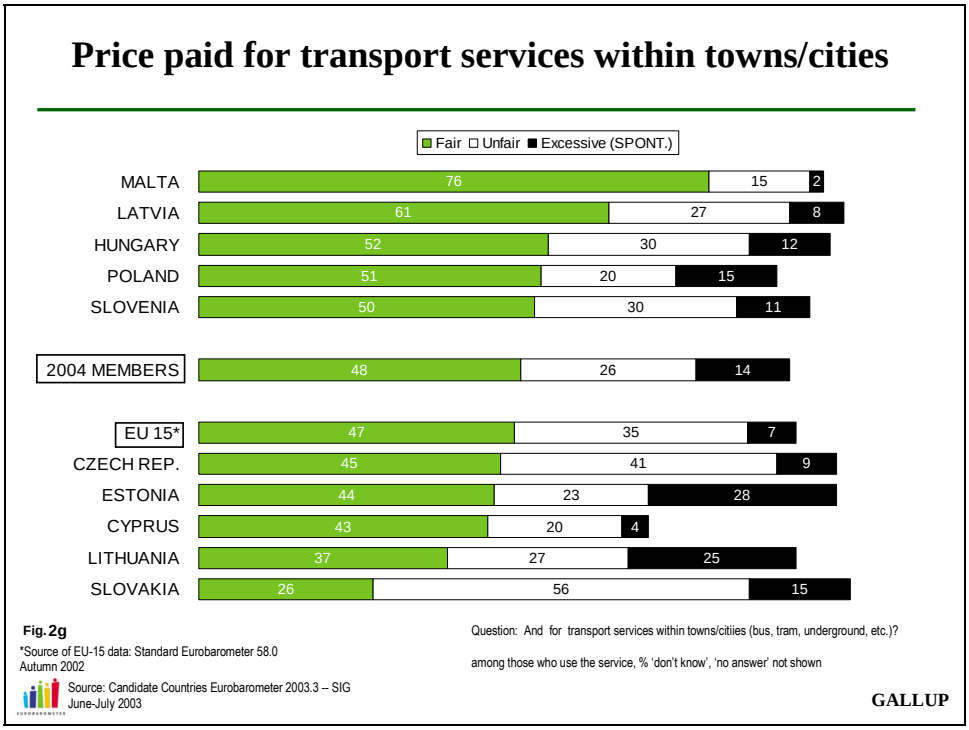
House persons and 15- to 24-year-olds are likeliest to consider postal services fairly priced (68% each); people from large towns and white-collar workers are the least likely to agree (54% each).

White-collar workers most often find the prices unfair (32%), while students (18%) and 15- to 24-year-olds and house persons say so least often (19% each). The likeliest to say postal service prices are excessive live in large towns and retired (15% each). For more detailed data, see *ANNEX TABLES 2.6a-2.6b.*

The price paid for transport services within towns/cities

Forty-eight percent of the acceding countries' respondents and 47% of those from the EU-15 say the prices of transport services in town are fair. Twenty-six percent of acceding countries' population, but 35% of the EU-15, consider the price they have to pay for in-towns tickets to be unfair. Fourteen percent of the 2004 countries and 7% in the EU-15 countries spontaneously answered that the prices for public transportation are excessive.

The Maltese (76%) and Latvians (61%) are likeliest to say the prices are fair. Slovakians are the least likely to find transport service prices fair (26%), and most likely to find them unfair (56%), followed by Czechs (41%). The Maltese have the lowest percentage of people saying the prices are unfair (15%). The Lithuanians, again, have the highest percentage of people saying the prices are excessive (25%).



Again, many people were reluctant to form an opinion, or share it with us: in *TABLE 2c* we filter out these non-responses and we focus on meaningful responses only (in Cyprus there is no reliable public transportation, people rather use taxis, therefore we have a high proportion of uncertain respondents in this question). From the table on the next page we see that the majority of those who have an opinion in Malta, Cyprus, Latvia, Poland, Hungary, and Slovenia are rather satisfied with public transport prices, while the opposite is the case in the Czech Republic, Estonia, Lithuania and Slovakia.

Table 2c Urban transport price satisfaction, proportion of meaningful responses only

	fair	unfair + excessive
MALTA	82	18
CYPRUS	64	36
LATVIA	64	36
POLAND	60	40
HUNGARY	55	45
SLOVENIA	55	45
MS-2004	55	45
CZECH REP.	47	53
ESTONIA	46	54
LITHUANIA	42	58
SLOVAKIA	27	73

Demographic analyses reveal that students are very likely to say transport prices are fair (57%) and the rural areas' or villages' populations are very unlikely to agree (43%). The "other" white-collar workers say, in the highest proportions, that the prices they have to pay for transport are unfair (35%), and house persons have the lowest rate of agreement (17%).

Twenty percent in large towns spontaneously say that urban transport prices are excessive (20%), but students (9%) and the younger (10%) are not likely to agree. For more detailed data, see *ANNEX TABLES 2.7a-2.7b.*

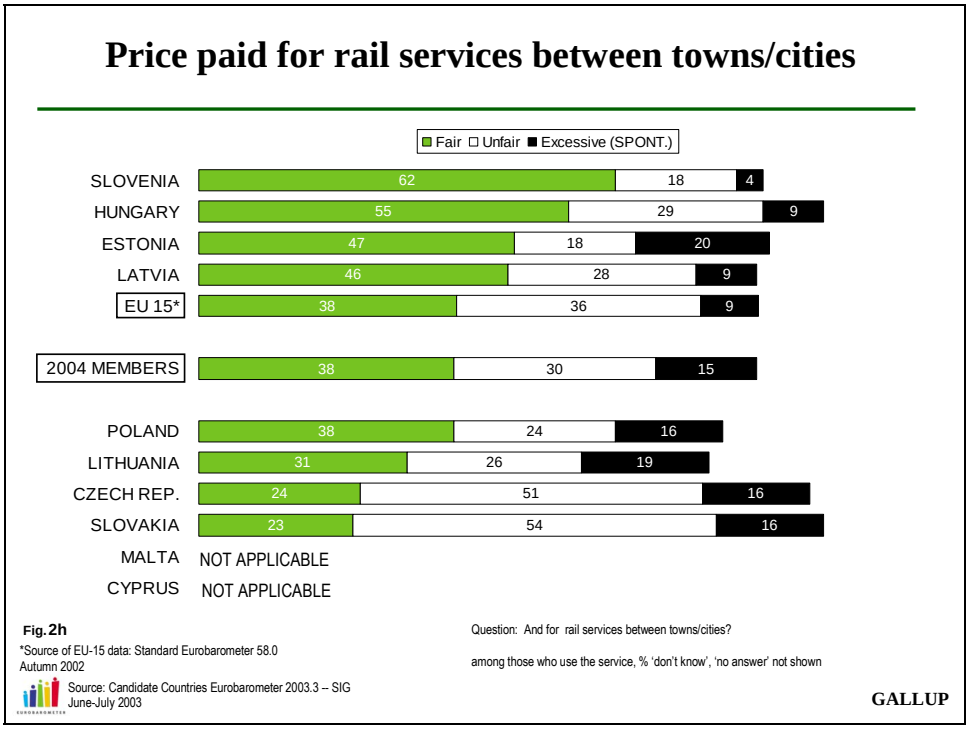
The price paid for rail services between towns/cities

Rail service in Europe is among the expensive ones, at least as people compare the value they get with the price they need to pay for it. More than one-third of the acceding countries' population considers the prices paid for rail services between towns or cities to be fair (38%). Nearly one-third of them say the prices are unfair (30%), and 15% consider the prices to be excessive. This question does not apply in Malta and Cyprus where there is no railway service.

In the EU-15[4], about the same percentages consider the inter-city rail prices to be fair and unfair -- 38% say the prices are fair, and 36% say they are unfair. Only 9% say the prices are excessive.

The acceding countries, examined one by one, show a rather varied picture. Slovenians (62%) and Hungarians (55%) are likeliest to say inter-city rail services prices are fair. Slovakians (23%) and Czechs (24%) say they are fair least often and are most likely to say they are unfair (51% in the Czech Republic and 54% in Slovakia). Of all accessing nationalities, Estonians and Slovenians are the least apt to say inter-town rail prices are unfair (both 18%).

Those from Estonia and Lithuania had the highest rate of saying prices are excessive (20% and 19% respectively).



Again, since many people were reluctant to share or form an opinion: in *TABLE 2d* we present the distribution of the meaningful responses only. We find that the majority of those who have an opinion in Slovenia, Hungary, Latvia, and Estonia evaluate railway prices as fair, while the opposite is true in Lithuania, the Czech Republic, and Slovakia. In Poland — if we analyze meaningful opinions only — neither those who are satisfied nor those unsatisfied can outweigh each other: although the group of those who believe the prices of inter-city rail services are unfair is marginally more important than the other one.

[4] Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

Table 2d. Railway price satisfaction, proportion of meaningful responses only

	fair	unfair + excessive
SLOVENIA	73	27
HUNGARY	59	41
LATVIA	56	44
ESTONIA	55	45
POLAND	48	52
MS-2004	46	54
LITHUANIA	41	59
CZECH REP.	26	74
SLOVAKIA	25	75
CYPRUS	..	..
MALTA	..	..

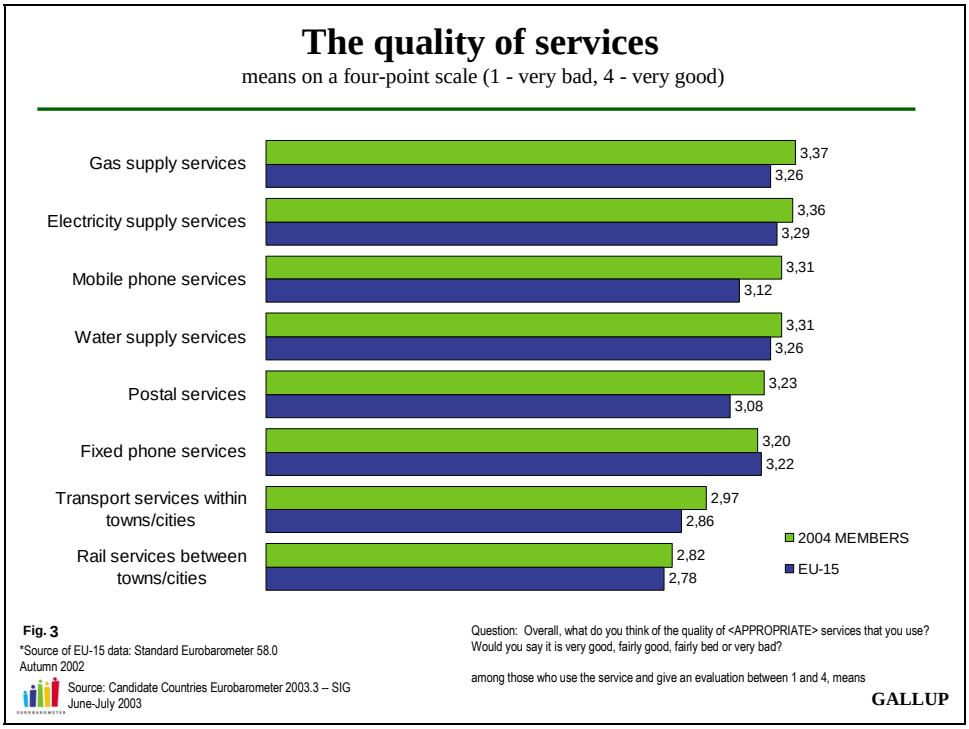
Demographic analyses reveal that students — utilizing considerable discounts — are very likely to say rail prices are fair (48%), and house persons and retired have the lowest rate of agreement (34% for all).

"Other" white collar workers are likeliest to say that the prices they have to pay for rail services between towns or cities are unfair (40%), and the retired, the older generation and those who left school at 15 are least likely to say the prices are unfair (25% all).

The large towns' populations are most likely to find the prices excessive (24%), and the rural areas' population and the self-employed are least likely (9 %and 10% respectively). For more detailed data, see *ANNEX TABLES 2.8a-2.8b*.

3. Quality of services

In this chapter, we discuss opinions -- very good (4), fairly good (3), fairly bad (2) or very bad (1) -- of the quality of mobile and fixed telephone services, electricity, gas and water supply services, postal services and transport and rail services (see also *ANNEX TABLES 3.1-3.8*). Again, we start with a quick check how the overall picture looks like in the EU-15 and in the acceding countries.



As *FIGURE 3* above shows gas and electricity are the utilities that gain the highest satisfaction score in the future and in the current member states as well. Satisfaction levels are generally similar in the two parts of Europe, with the future consumers being slightly more satisfied with the utility and other services of general interest in general. There are two services where future EU citizens and consumers are clearly more satisfied than current Europeans: with the quality of postal services and with the quality of mobile telephone services. In the case of the other services we see a very similar level of satisfaction in old and new Europe.

Satisfaction levels are generally high — somewhere between 3 and 4, between 'fairly good' and 'very good' — in most of the cases. The average scores fall below this range in the case of urban transport and inter-cityrail services; Europeans are the least satisfied with these services among the listed ones.

This table summarizes the mean satisfaction scores country-by-country, we will refer back to these data later in this subchapter.

Table 3. Mean satisfaction with the quality of services
(1=very bad, 2=fairly bad, 3=fairly good, 4=very good)
(means, by country)

	Mobile telephone services	Fixed telephone services	Electricity supply services	Gas supply services	Water supply services	Postal services	Transport services within towns/cities	Rail services between towns/cities
2004 MEMBERS	3.31	3.20	3.36	3.37	3.31	3.23	2.97	2.82
CYPRUS	3.56	3.65	3.54	N/A	3.56	3.58	3.10	N/A
CZECH REP.	3.40	3.20	3.36	3.34	3.30	2.95	2.82	2.52
ESTONIA	3.20	3.06	3.14	3.17	2.97	3.16	2.91	2.90
HUNGARY	3.37	3.25	3.43	3.35	3.42	3.33	2.82	2.93
LATVIA	3.14	3.00	3.36	3.35	2.95	3.21	3.06	3.02
LITHUANIA	3.26	3.06	3.27	3.29	3.01	3.15	2.93	2.98
MALTA	3.51	3.56	3.51	3.57	3.43	3.61	2.86	N/A
POLAND	3.28	3.21	3.37	3.39	3.34	3.31	3.10	2.89
SLOVAKIA	3.32	3.03	3.29	3.36	3.25	2.91	2.43	2.50
SLOVENIA	3.30	3.30	3.40	3.38	3.34	3.39	2.93	3.01
EU-15[5]	3.12	3.22	3.29	3.26	3.26	3.08	2.86	2.78

[5] Source of EU-15 data: Standard Eurobarometer 58.0 Autumn 2002

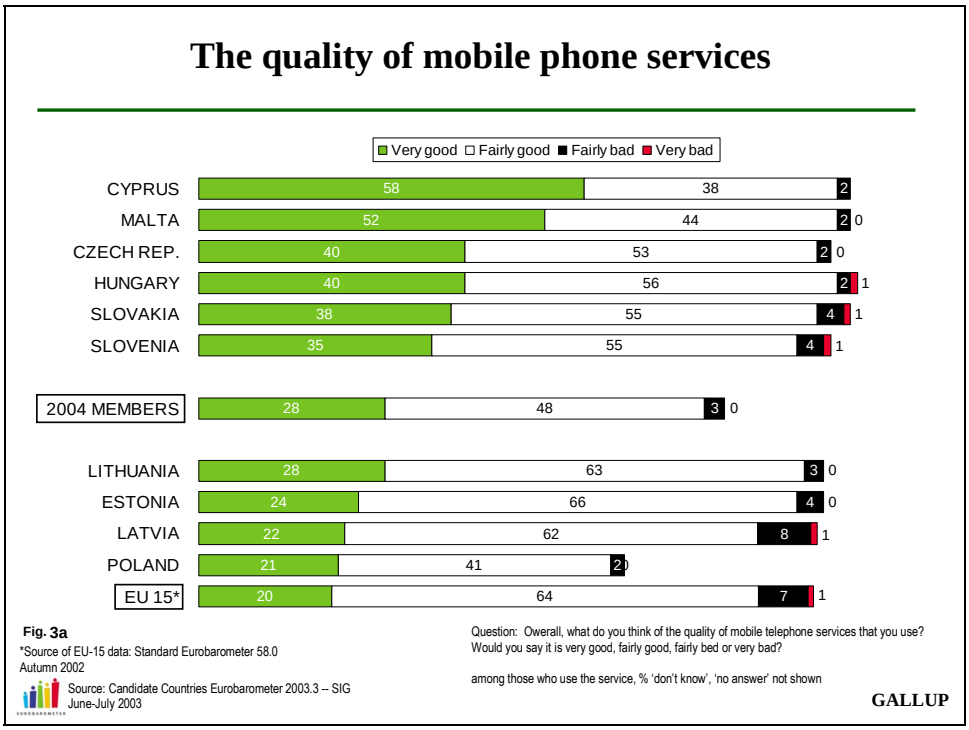
The quality of mobile telephone services

The majority of the acceding countries consider the quality of mobile telephone services to be either very good or fairly good (76%), and only 3% say the quality is fairly bad. Almost no one says the quality is very bad – and 28% say the quality is very good.

EU-15 population has a rather different opinion on this question: While only 20% say the quality is very good, two-third of people call it fairly good (64%). Seven percent and 1%, respectively, say it is fairly bad or very bad.

FIGURE 3a below shows that the Cypriots (58%) and Maltese (52%) are the most apt to say the mobile telephone services are very good, and the Poles are the least likely (20%). Hungarian, Maltese, and Cypriots (each 96%) are likeliest to say the quality of mobile telephone services is either very good or fairly good; the Polish say have the lowest numbers of people saying the quality of mobile telephone services are very good or fairly good (62%). A negligible number from only a few countries say the quality of mobile telephone services is very bad (1% each for Slovenia, Hungary, Slovakia, and Latvia), and only 8% of Latvians -- the highest percentage in any 2004 country -- say they are fairly bad.

Looking at *TABLE 3* above, we can summarize that the mean satisfaction scores from all countries are generally above 3 (above 'fairly satisfied' level), with highest mean in Cyprus (3.56) and the lowest in Latvia (3.14). The mean score for acceding countries is 3.31, which is higher than what Eurobarometer measured in the EU-15 in Autumn 2002 (3.12).



Managers are the likeliest to say the quality of mobile telephone services is either very good or fairly good (95%) and they are also the most likely to say that the service is very good.

Those who left school at or before 15 are most apt to say the mobile telephone service is fairly good or very good (46%), but only 2% of them consider it fairly bad and 1% of them say the service is very bad.

In general, we can say a very low number from each demographic group finds the mobile telephone services to be fairly bad or very bad, but students top the ranks of those who do (5%). For more detailed data, see *ANNEX TABLES 3.1a-3.1b.*

The quality of fixed telephone services

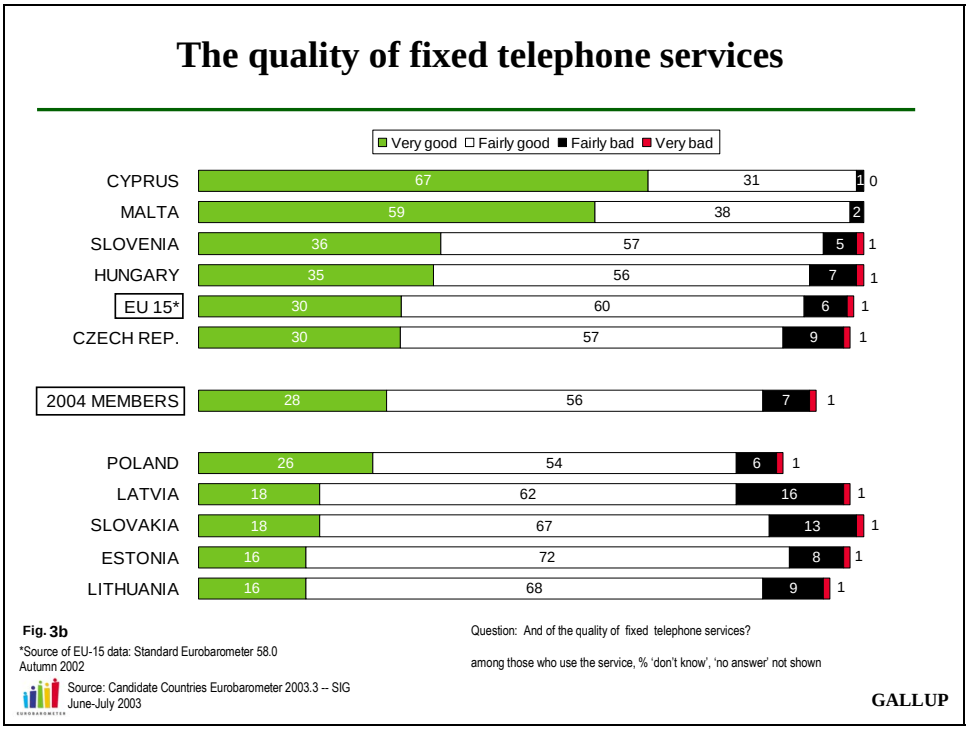
People from the acceding countries generally consider fixed telephone services to be of very good or fairly good quality more often than they say this about mobile telephones. Eighty-four percent of them say fixed telephone quality is very good or fairly good, and only 8% say it is fairly bad or very bad. More precisely, 28% say the fixed telephone service quality is very good, and 1% says it is very bad.

In the EU-15, 30% say the fixed telephone quality is very good, 60% say it is fairly good, 6% say it is fairly bad, and 1% says it is very bad.

Cypriots (67%) and the Maltese (59%) are likeliest to say the fixed telephone services are very good. When the two positive categories are combined, the Cypriots and Maltese again lead the list, with 98% and 97%, respectively. At the bottom of the list are Poles and Latvians; 80% in both countries say the fixed telephone services are very or fairly good.

Sixty percent of Latvians and 13% of Slovakians consider the fixed telephone services' quality fairly bad, but only a negligible proportion in any country thinks the services are very bad (0%-1%).

Looking at the summary table with the satisfaction scores (*TABLE 3*, page 30), we see the acceding countries' mean for fixed telephone services is 3.20, and the EU-15 mean is 3.22. The highest mean, again, is found in Cyprus (3.65) and the lowest is in Latvia (3.00).



Again, managers have the best opinion of fixed telephone services: 89% of them think the quality of services is very good or fairly good. The people with low education agree least often (74%). The inhabitants of large towns have the worst opinion of fixed telephone quality -- 12% say it is very bad or fairly bad. But practically nobody, 0%-3% from each demographic group says the landline phone services are *very* bad. For more, see *ANNEX TABLES 3.2a-3.2b.*

The quality of electricity supply services

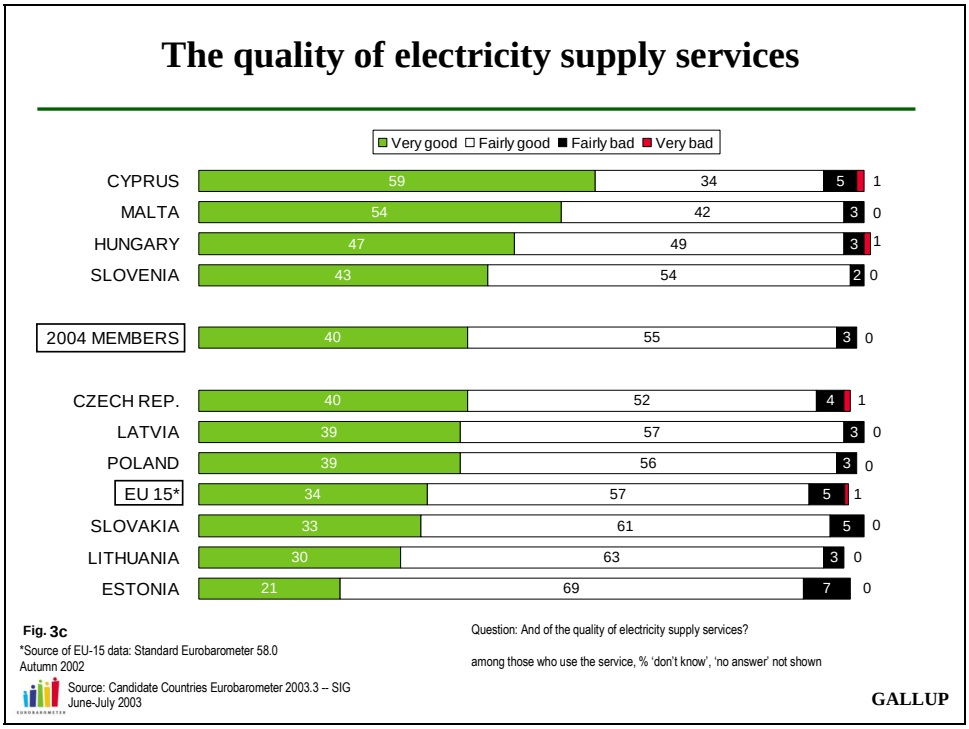
A huge majority says the quality of electricity supply services is very good or fairly good, ranging from 90% in the Estonia to 97% in Slovenia.

Forty percent in the acceding countries say the quality of services is very good, 55% think it is fairly good, and a tiny minority, 3%, say the service quality is fairly bad. Almost no one considers the quality of electricity supply services to be very bad.

In the EU-15 countries, 34% of the population says the quality of service is very good, and 57% consider it fairly good. There are only a few people, 5%, who think the service quality is fairly bad, and only 1% say it is very bad.

Similar to results for the previous questions from this subchapter, the Cypriots (59%) and the Maltese (54%), followed by Hungarians (47%), are likeliest to say the quality of electricity supply services is very good. The Estonians and Lithuanians are least likely to agree (21% and 30%, respectively).

Only 7% of Estonians and 6% of Cypriots, think the quality of electricity supply services is fairly bad or very bad, and of these, only Czech, Hungarian and Cypriots respondents (1%) think the services are very bad.



Almost 9 out of 10 persons from all demographic groups think the quality of electricity supply services is very good or fairly good. Managers and those in small or medium-sized towns have the highest opinions -- 44% of each think the quality is very or fairly good. The rural area's population and unemployed are the least likely to say the quality of the services is very good, but students are least apt to say the quality is very or fairly good (90%).

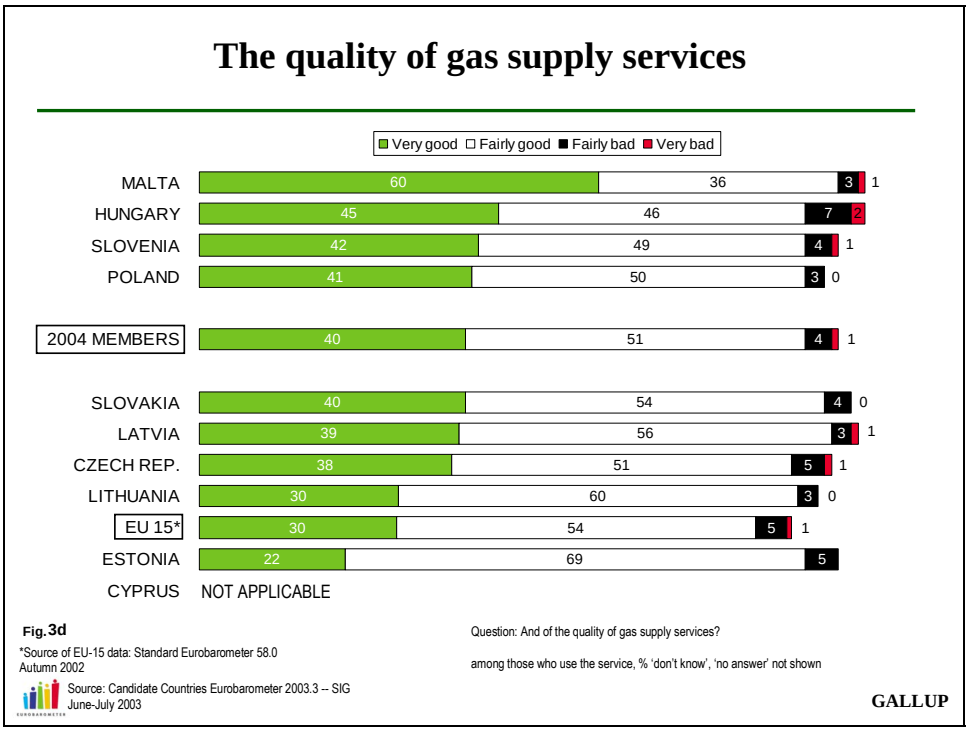
The quality of electricity supply services is considered very or fairly bad most frequently (6%) in large towns, but only 1% say it is very bad (as do 1% of other white-collar workers). For more detailed data, see *ANNEX TABLES 3.3a-3.3b*.

The quality of gas supply services

Forty percent in the acceding countries -- and only 30% in the EU -- consider the quality of gas supply services to be very good, and 51% say the quality is fairly good. In the EU, 54% say it is fairly good. As we explained earlier, this question is not applicable in Cyprus.

Only 5% in the 2004 member countries and 6% in the EU think the services are very or fairly bad (1% in each say the services are very bad).

Individual countries have rather different opinions of the quality of gas services than the quality of electricity services. Sixty percent of Maltese, 45% of Hungarians and 42% of Slovenians think gas supply service quality is very good, and 36%, 46% and 49%, respectively, say it is fairly good.



Unemployed are most likely to think the quality of gas supply services is very or fairly good (95%). Managers are most apt to say the quality is very good (49%), followed by those who finished their education at 20 or older and people from small or middle-sized towns (46%). The population in rural areas is least likely to have a high opinion of the quality of gas supply services: 86% say it is very or fairly good (very good – only 32 %).

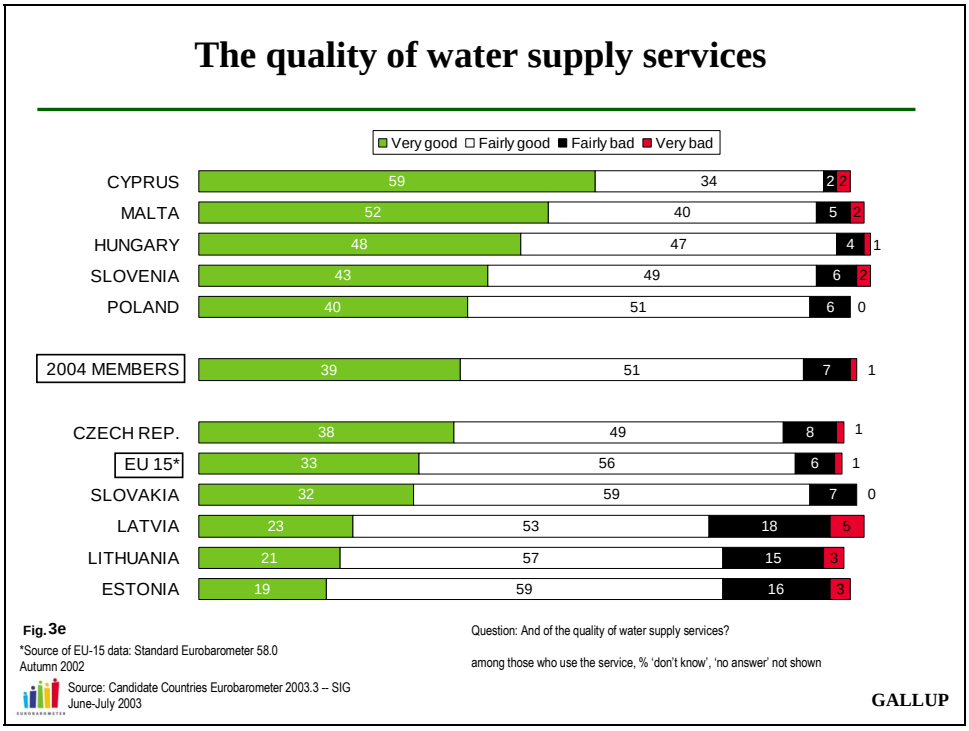
Looking at the negative attitudes, house persons are most likely to say the quality of the services is very or fairly bad (7%). Only 0%-2% of the demographic groups consider the gas supply services' quality to be very bad. For more detailed data, see *ANNEX TABLES 3.4a-3.4b.*

The quality of water supply services

Ninety percent in the acceding countries think the quality of water supply services is very or fairly good, with 39% saying the quality is very good. Only 8% of the population considers the water supply service quality to be very or fairly bad.

We find slightly different figures in EU-15 countries. Thirty-three percent say the quality of services is very good, 56% say it is fairly good, 6% say it is fairly bad and only 1% say it is very bad.

Comparing individual countries, Cypriots (59%), Maltese (52%) and Hungarians (48%) are likeliest to say that the water supply services' quality is very good, and these countries' populations are also likeliest to think these services are very or fairly good (93%, 92% and 95%, respectively). Seventy-eight percent of Lithuanians and Estonians think the services' quality is very or fairly good, making them least apt of all countries to have a high opinion. The Baltic countries are likeliest to say the quality of water supply services is fairly or very bad (Latvia 23%, Estonia 19% and Lithuania 18%), and they are most likely to say the quality is very bad as well (Latvia 5%, Estonia and Lithuania both 3%).



House persons have the highest rate of considering the quality of water supply services to be very or fairly good (94%), and the students has the lowest rate of thinking so (86%). Managers are likeliest to say the quality of services is very good (46%), but the unemployed are the least likely (34% each).

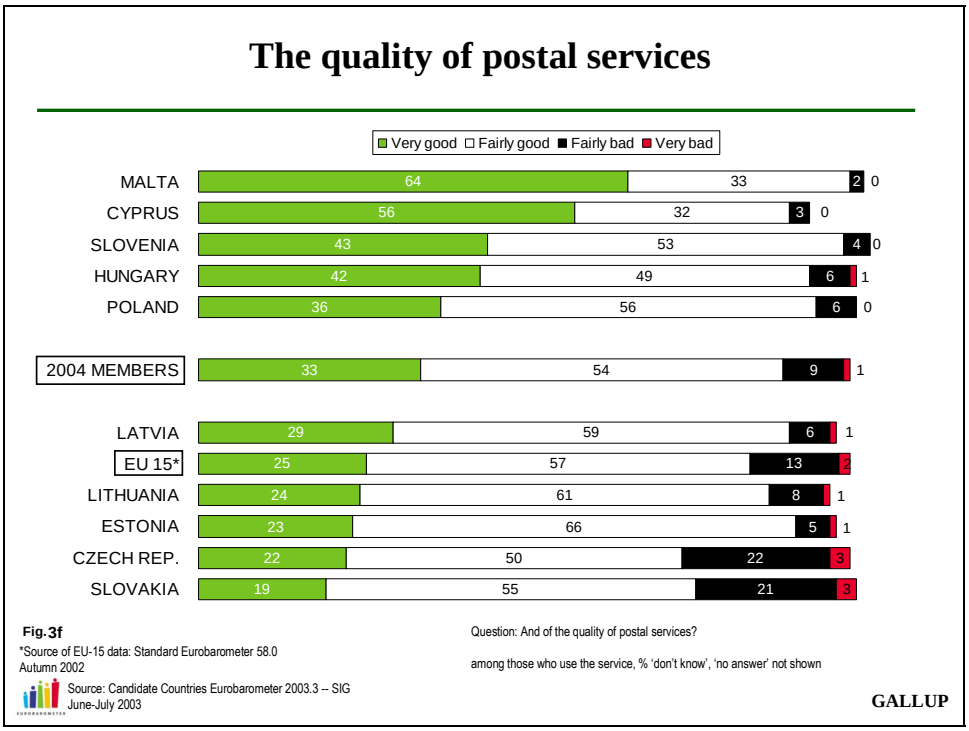
Twelve percent of the large towns' population and of the unemployed say the quality of water supply services is very or fairly bad. For more detailed data, see *ANNEX TABLES 3.5a-3.5b.*

The quality of postal services

One-third of the population in the acceding countries think the quality of postal services is very good (33%), more than half say the quality is fairly good (54%), and only 9% and 1%, respectively, think the quality is fairly or very bad.

In the EU-15, 25% say the quality of postal services is very good, 57% say it is fairly good, 13% think it is fairly bad, and finally, a very small minority says the quality is very bad (2%).

Among the individual countries, Malta (64%) and Cyprus (56%) are most apt to say the quality of postal services is very good. When the two positive answers are grouped together, Slovenians (96%), the Maltese (97%) and Poles (92%) are likeliest to say the quality of postal services is very or fairly good. About one in five of Slovakians (21%) and Czechs (22%) think postal services' quality is fairly or very bad (3% say it is very bad).



House persons and the unemployed generally think the most highly of the quality of postal services -- 93% and 92%, respectively, say it is very or fairly good, and house persons and the retired have the very highest opinions – 39% and 37%, respectively, say the quality is very good. Only 29% of the self-employed think the quality of postal services is very good.

White-collar workers, not including managers, are likeliest to say the quality of postal services is fairly or very bad (16%). Only a small minority from each demographic group considers the quality of postal services to be very bad (0%-2%). For more detailed data, see *ANNEX TABLES 3.6a-3.6b.*

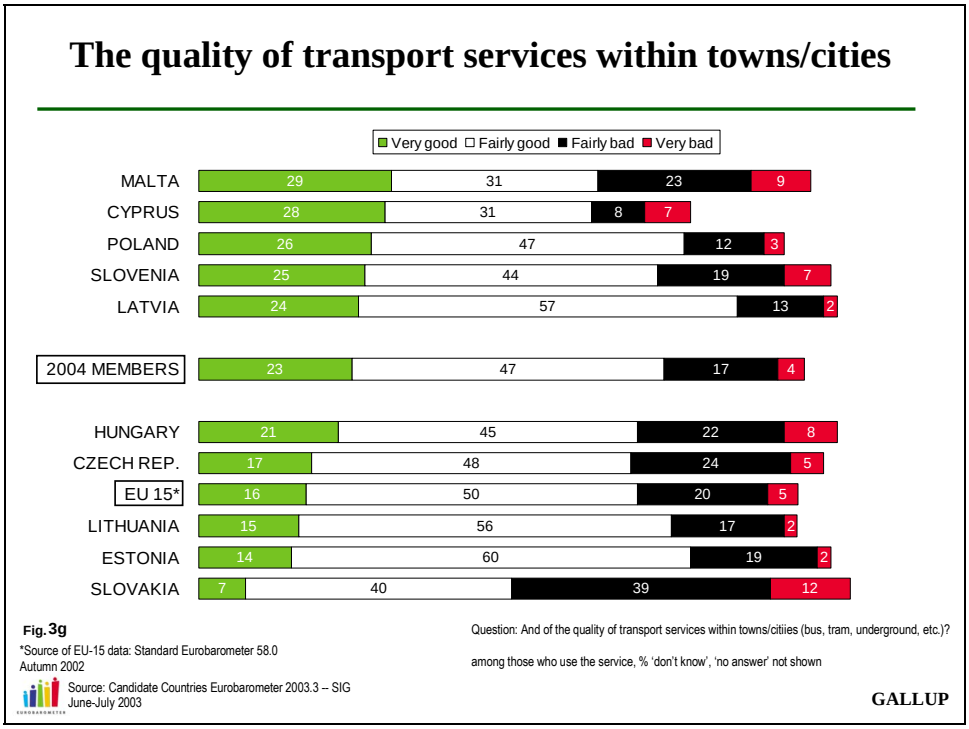
The quality of transport services within towns/cities

On average, nearly one in four in the acceding countries think the quality of urban transport services is very good (23%) and nearly half of respondents consider it fairly good (47%), 17% call it fairly bad, and finally, 4% say it is very bad.

In the EU-15 countries, only 16% say urban transport service quality is very good, but 50% call it fairly good. Twenty percent of EU-15 population think urban transport services' quality is fairly bad and 5% think it is very bad.

Eighty-one percent in Latvia, 74% in Estonia and 73% in Poland think that the quality of urban transport services is very or fairly good, but only 24% in Latvia, and 26% in Poland and 25% in Slovenia, say the quality is very good. In Malta, 29% say the quality of this service is very good, but so do only 7% in Slovakia. Slovakians have the lowest opinion -- 47% say the quality of urban transport services is very or fairly bad.

As the summary table above shows (*TABLE 3*, page 30), the means are relatively low: in the acceding countries, the mean of the quality of transport services is 2.97; in the EU-15, this figure is 2.86. Inside the acceding countries, the highest means we measured are in Cyprus and Poland (both 3.10), and the lowest is in Slovakia (2.43).



Inhabitants of small and middle-sized towns and retired people are the groups having the highest proportion saying the quality of transport services within towns or cities is very good (27%) and rural areas have the lowest proportion (18%). Summarizing the data for the two positive answers, we conclude that the unemployed (75%) retired and elderly people (both 72%) are most apt to be positive, and young people (67%) are least apt to think urban transport services' quality is very or fairly good.

In the greatest proportion managers (28%) -- and in the lowest proportion, those unemployed (17%) -- think the quality of urban transport services is very or fairly bad. Eight percent of other white-collar workers say transport quality is very bad, as do 7% of managers. For more detailed data, see *ANNEX TABLES 3.7a-3.7b.*

The quality of rail services between towns/cities

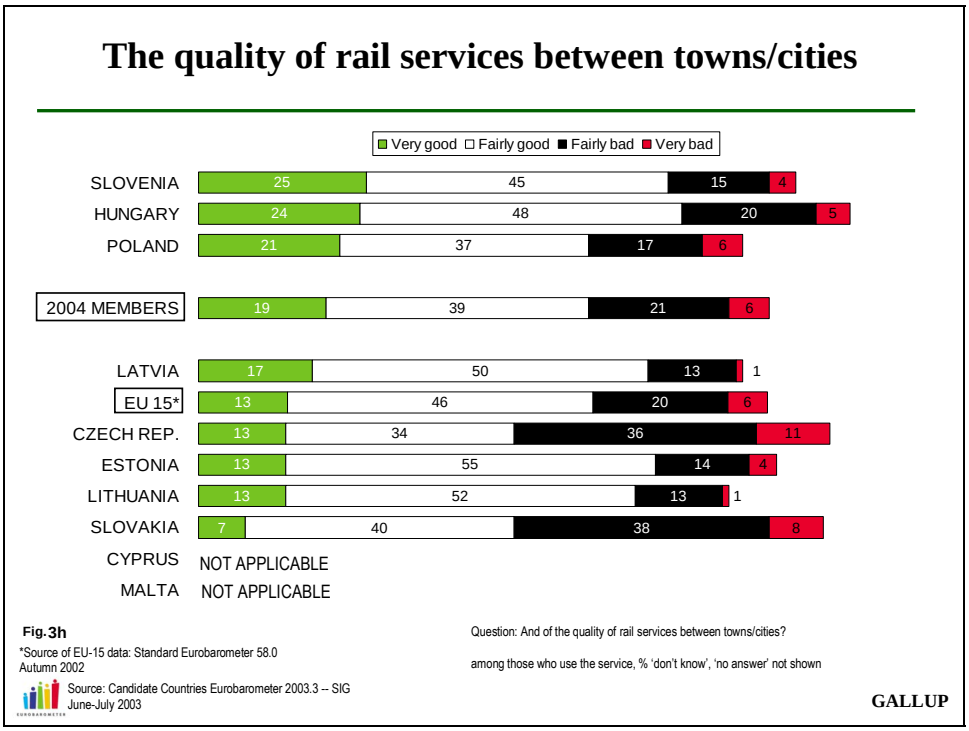
Responses to the question about quality of rail services between towns or cities are less positive than they have been for other questions. Nineteen percent in the acceding countries say the quality of rail services is very good, 39% say this quality is fairly good, as many as 21% think that the inter-city rail service quality is fairly bad, and 6% call it very bad. In Cyprus and Malta, there is no rail service available.

In the EU-15 countries, 13% of the population thinks the inter-city rail services' quality is very good, 46% say it is fairly good, 20% say it is fairly bad, and finally, 6% say it is very bad.

Slovenians are likeliest to say the quality of inter-city rail services is very good (25%), and Slovakians are least likely (7%). Combining the "very" and "fairly good" answers, the highest figure is in Hungary (72%), and the lowest one is in Slovakia and Czech Republic (47%).

Thirty-eight percent of the Slovakians and 36% of the Czech people consider the quality of inter-city rail services to be fairly bad. Forty-seven percent of Czechs, and 46% of Slovakians, say the quality is fairly or very bad (these are the highest rates).

The mean of quality of service is higher in the acceding countries than in the EU-15 (2.82 vs. 2.78). The rank order changes if we look at means, since this indicator filters out the non-response effect (quite a few people did not have an opinion to share); according to this, Latvians (3.02) and Slovenians (3.01) rate the rail services' quality the highest, while the Czech (2.52) and Slovakians rate it lowest (2.50 – see *TABLE 3*, page 30).

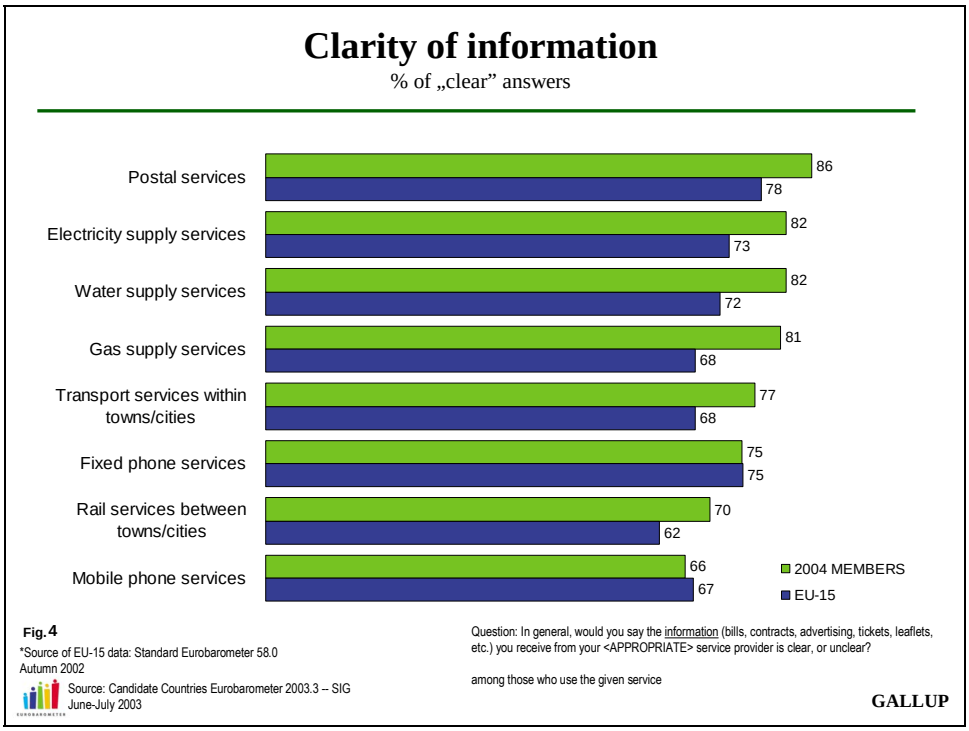


Looking at the answers by demographic groups, the house persons and unemployed say, in the highest proportion, that the inter-city rail service quality is very good (22%). Only 15% of the rural area and students would agree. Unemployed have the best opinion - very or fairly good - of inter-city rail service quality (66%) and managers and people from rural areas think the same, 52%.

Managers and students don't often say rail service quality is very bad (10%); but 33% of managers consider it to be very or fairly bad.

4. Clarity of information

This chapter describes the opinions of consumers in the acceding countries about the clarity of information (bills, contracts, advertising, tickets, leaflets, etc.) they receive from the providers of mobile and fixed telephone service, electricity, gas and water supply service, postal service, public transport and rail service (see also *ANNEX TABLES 4.1a-4.1b*). *FIGURE 4* shows that acceding countries consumers are generally more satisfied with the quality of information they receive than their fellows already in the EU-15.



The best information people feel to receive comes from postal services, with 86% in the future member states and 78% in the EU-15 evaluating its information as "clear", postal service is Europe's best from this perspective (and among the listed services, of course). Information from electricity, water, and gas providers are almost as good as the one people receive from the post — at least in the future member states; current EU consumers are much less satisfied with the clarity of the information they receive from electricity, water, and gas providers.

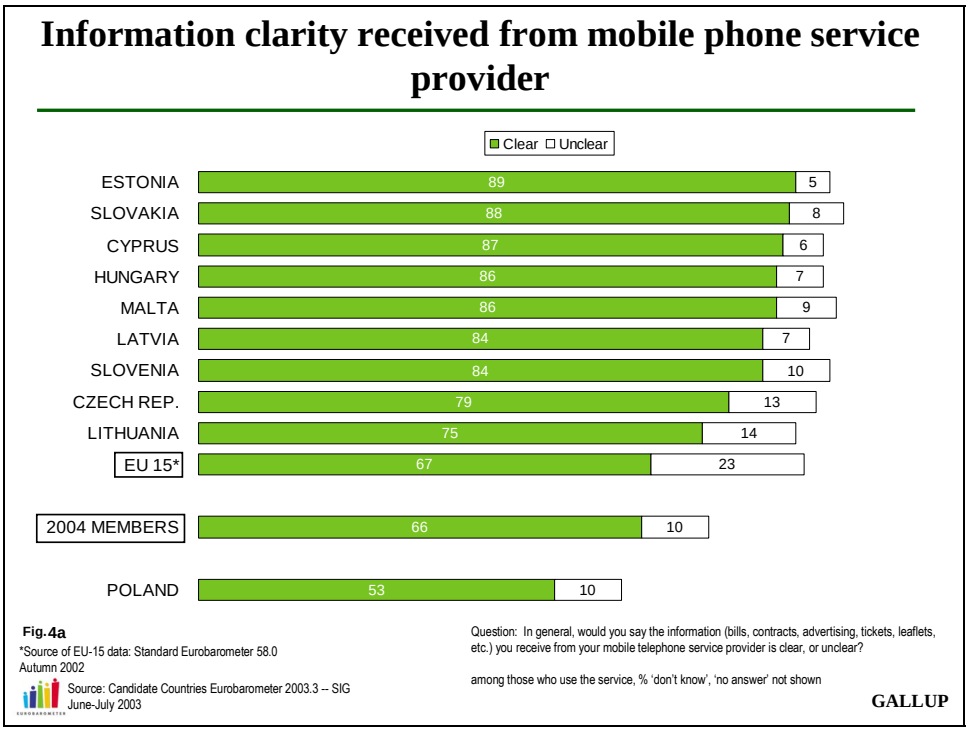
Seventy-seven percent in the acceding countries and 68% in the EU-15 are satisfied with the clarity of information they receive from the urban transport services. We find a similar difference with inter-city rail services at slight lower level: 70% in the acceding countries and 62% in the EU-15 find the information they receive from their railway companies clear.

Equally three quarters in both the acceding and in EU-15 countries believe that the information they receive from the fixed telephone provider is clear, this 75% figure puts fixed telephone to the second place in the Union, but is enough only for the sixth place in the acceding countries. Interestingly, in both parts of Europe, quality of information is the worst in the case of mobile telephone providers: only two thirds find the information they receive from mobile telephone providers clear (CC: 66%, EU: 67%).

Clarity of information received from mobile telephone service providers

As we just noted, only two-third of the acceding countries' population says the information received from mobile telephone service providers is clear, and only 10% consider it unclear. The figures in the EU-15 countries are 67% and 23%, respectively.

As *FIGURE 4a* shows below, there are rather large differences among individual countries regarding the clarity of information (ranging from 53% in Poland to 89% in Estonia), but also regarding the lack of clarity (those finding the information unclear range from 5% in Estonia and Cyprus to 14% in Lithuania). In Poland those proportion who do not even know or do not answer is very high (37%), in the other countries this range is only 4% to 11%.

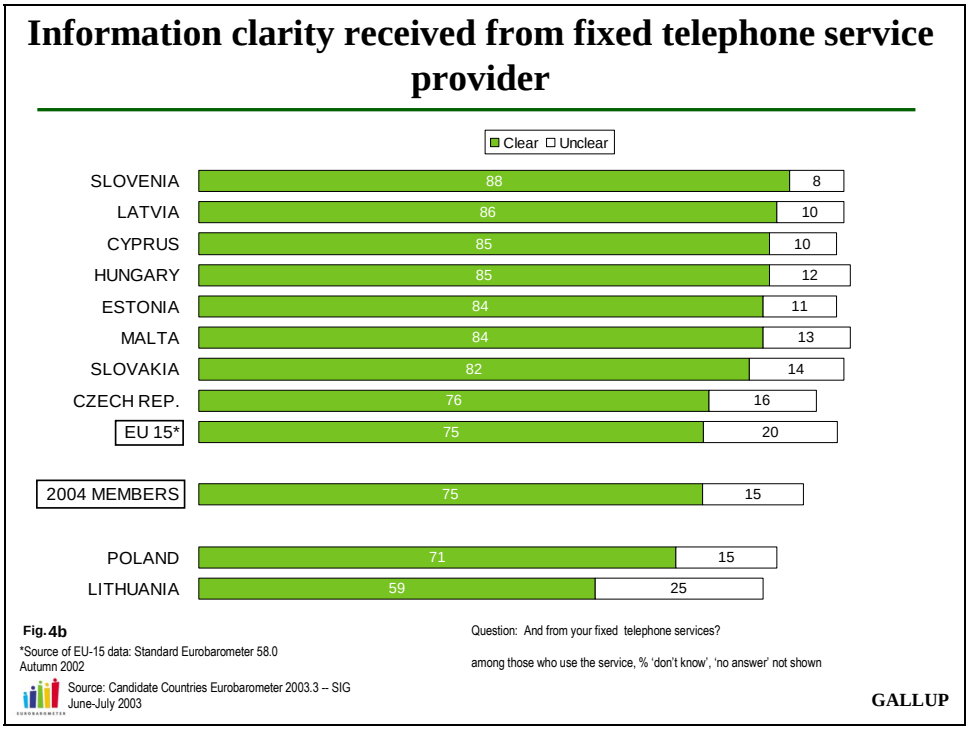


Analyzing the results by demographic groups, we find that managers are most likely to find the information received from their mobile telephone service providers to be clear (81%), followed by students (80%) and 15- to 24-year-olds (78%). Those who finished their education at 20 years or above and people from large town, and managers are most likely to find this information unclear (13%). It is surprising, but it is possible, if we examine the proportions of the "don't know" responses that go up as high as to 56% at low qualified people, 32% among villagers, or 28% among house persons. In that sense the "don't know" response seems to be a probably even stronger substitute for the "unclear" option (see *ANNEX TABLE 4.1a-4.1b.*).

Clarity of information received from fixed telephone service providers

Three-quarter of those from the acceding countries say the information from fixed telephone service providers is clear (75%), and nearly every sixth people say it is unclear for them (15%). A higher percentage in the EU than in the acceding countries says the information is clear (75%), and a higher percentage considers it unclear, too (20%) which again indicates that more people are unable to form an opinion in the future member states in this question.

Comparing the individual countries' data, Slovenians (88%) and Latvians (86%) lead the list of those who find the information they receive from their fixed telephone providers clear, and Lithuanians are at the bottom of this ranking (59%). Lithuanians also have the highest percentage saying the information is unclear (25%), followed by the Czechs (16%), and the Polish consumers (15%).



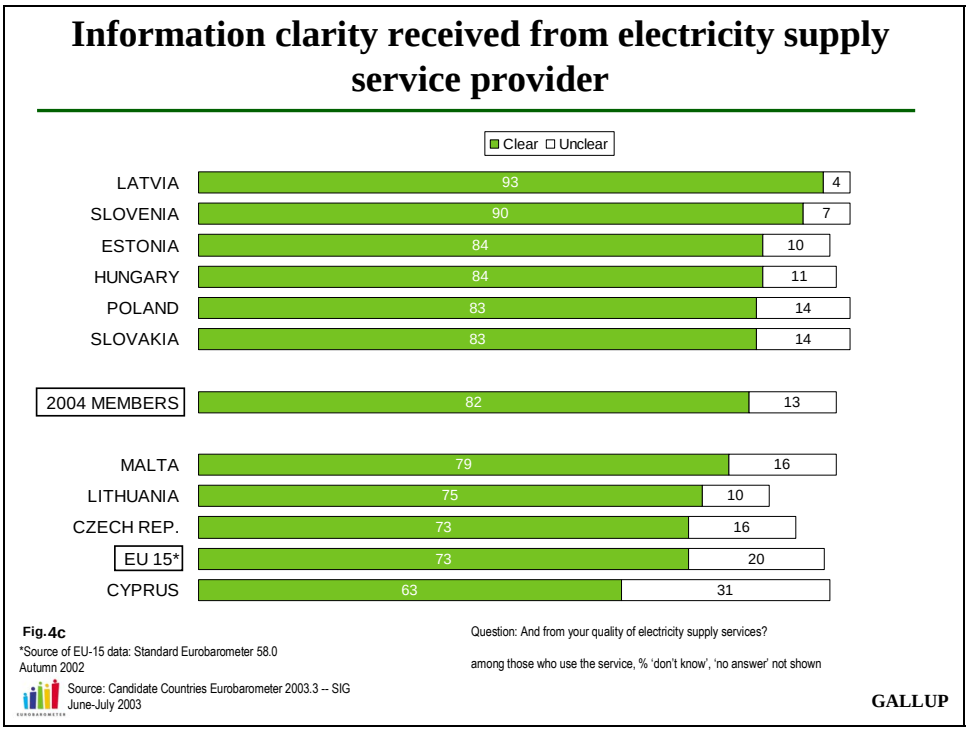
Looking at the satisfaction levels according to the socio-demographic status of the respondents, we find that managers (82%), other white-collar workers (80%) and those who left school at 20 or older (79%) and are likeliest to say fixed telephone service providers give clear information, and those who left school at or before 15 years are least likely to say this (64%).

Looking at the other side, the populations from large towns (20%), those who left school at 20 years or older (18%) and unemployed (16%) are likeliest to find the information unclear. For more detailed data, see *ANNEX TABLES 4.2a-4.2b.*

Clarity of information received from electricity supply service providers

A large majority in every country considers the information received from electricity supply service providers to be clear, including 82% in the acceding countries. Thirteen percent say the information is unclear. Fewer in the EU-15 say that the information they get from the electricity provider is clear for them (73%), and a higher proportion says it is unclear (20%).

At the country level, the percentages saying the information is clear range from 63% in Cyprus and 73% in the Czech Republic to 93% in Latvia. The proportion saying it is unclear ranges from 4% in Latvia to 31% in Cyprus.



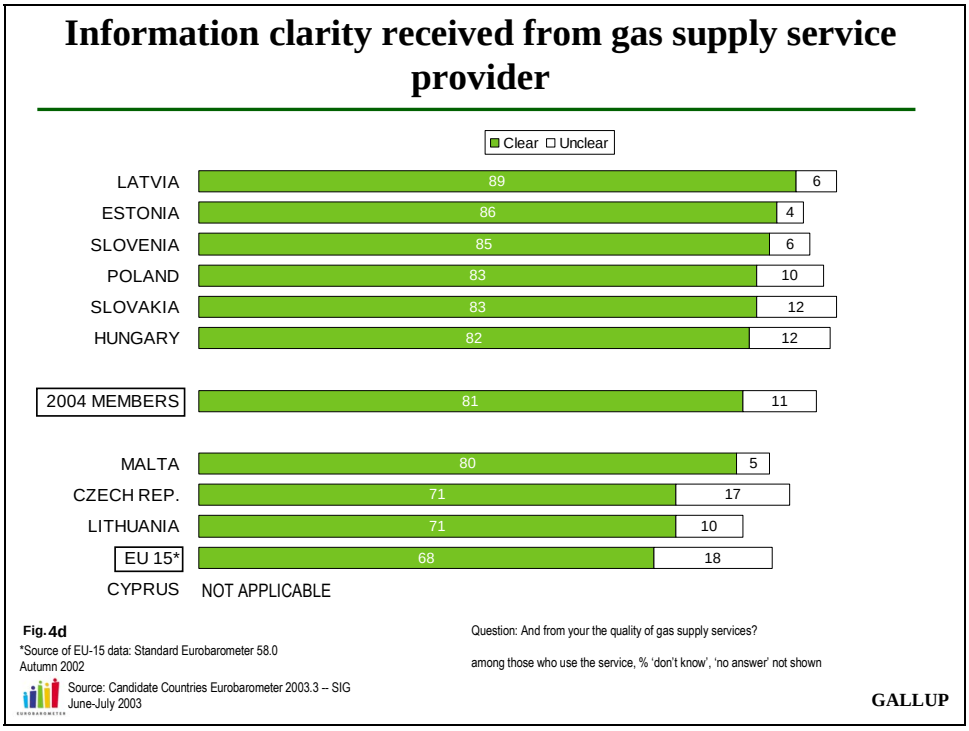
At the demographic level, house persons are most apt (89%) and students are least apt (70%) to say the information received from electricity supply service providers is clear. Other white-collar workers are most likely to find the information unclear (18%), followed by the unemployed (17%). For more details, refer to *ANNEX TABLES 4.3a-4.3b.*

Clarity of information received from gas supply service providers

On average, 81% of the acceding countries' population finds the information they get from gas supply service providers on bills, leaflets, contracts, tickets, etc. to be clear, and 11% find it unclear. Significantly less, only 68% in the EU say the information received from gas supply service providers is clear, and 18% say they find it unclear.

Especially the people find the information from gas supply service providers to be clear in Latvia (89%), Estonia (86%) and Slovenia (85%), and on the other side, only 71% in Lithuania think so, too.

Looking only at those who find gas supply providers' information unclear, Czechs lead the list (17%), followed by Slovakians and Hungarians (12% for both). Only 4% of Estonians find this information unclear.



The self-employed and managers are the most likely to admit that the gas supply service providers' information is clear (87% and 85%, respectively), and students and young people have the lowest rate of agreement (70% and 74%, respectively).

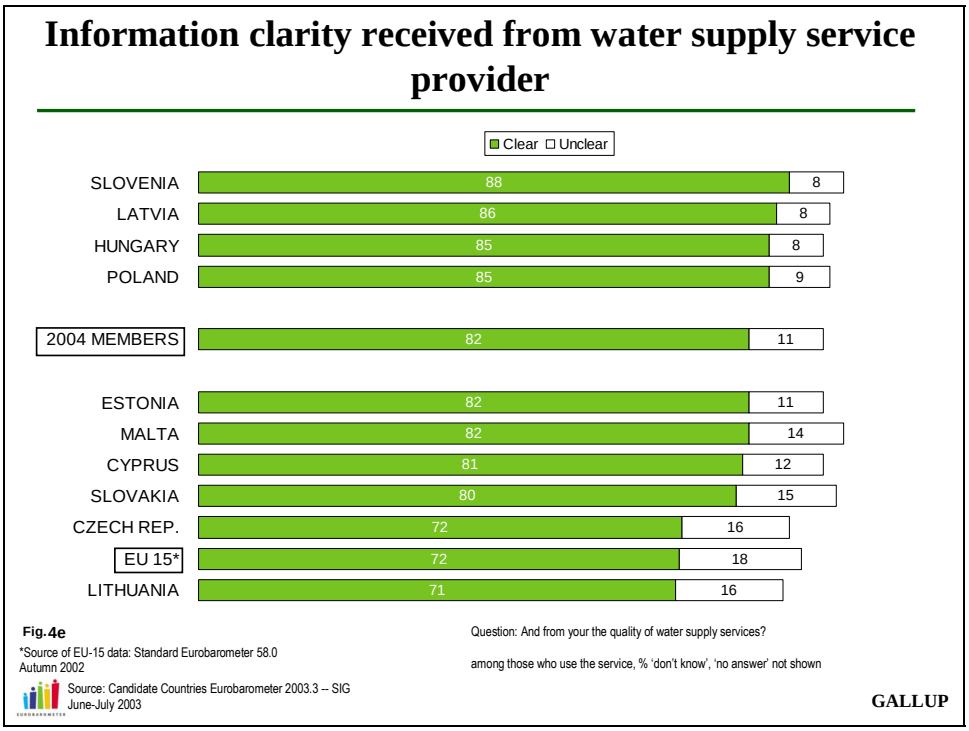
Those who left school at 20 or older, people from large towns and other white-collar workers are likeliest to say gas supply service providers send unclear information (14%), but ratio of those people who don't know or don't answer is very high at group of students (22%) and young people (17% — see also *ANNEX TABLES 4.4a-4.4b.*).

Clarity of information received from water supply service providers

A very high percentage, 82%, of the acceding countries say the various information from their water supply providers are clear, and only 11% find them unclear. As with other public utilities, the picture is less bright in the EU-15, where 72% say the information received from water supply service providers is clear, and 18% say it is unclear.

As *FIGURE 4e* shows below, Slovenians are most apt to find this information clear (88%), followed by Latvians (86%), Hungarians and Poles (85%). Lithuanians (71%) and Czechs (72%) are at the bottom of the list.

Czechs and Lithuanians, more than any other, say the information from water supply providers is unclear (both 16%), followed by the Slovakians (15%) and Maltese (14%).



House persons are likeliest (89%) to say water supply information is clear, and students (71%) are least likely.

Looking at those who say the information from water supply service providers is unclear, the list is led by those in large towns (16%), who are followed by other white-collar workers, high qualified people and the unemployed (each 14%).

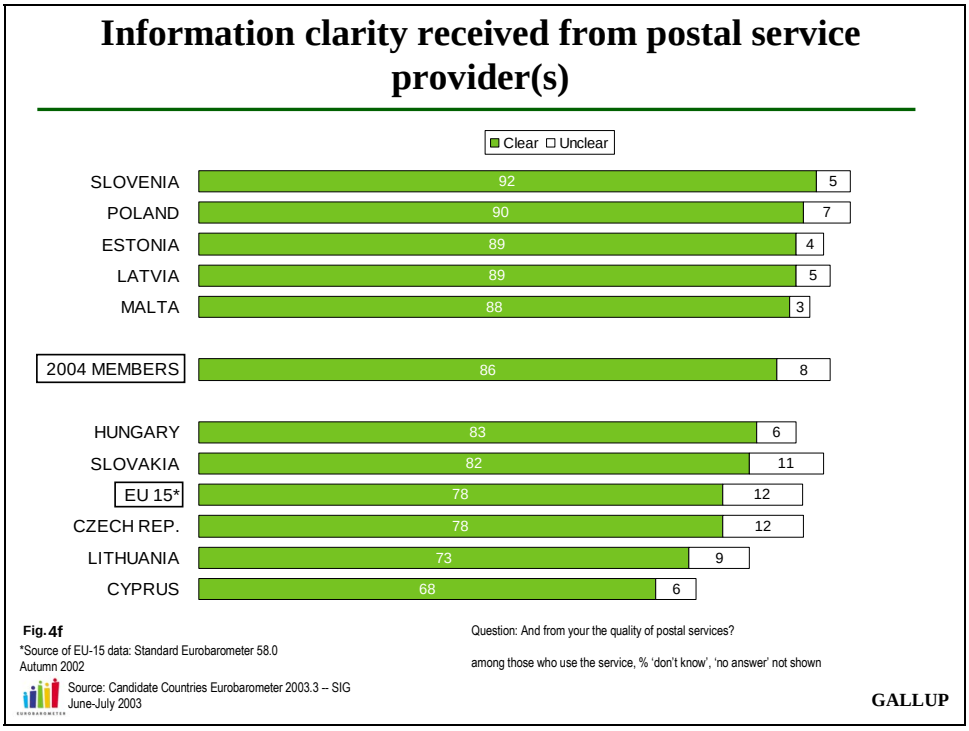
Students and the youngest age group are those who can't formulate an opinion in this question in the greatest proportions (22% and 17% respectively). (see *ANNEX TABLES 4.5a-4.5b.*)

Clarity of information received from postal services providers

The large majority in the acceding countries say the information they receive from postal services providers is clear for them (86%) and only a minority (8%) says the contrary. In the EU-15, these figures are 78% and 12%, respectively. In fact, as we have noted above, postal service is considered to be the best from the information perspective in both parts of Europe.

Slovenians have the highest rate of saying postal services information is clear (92%), followed by the Polish (90%), Estonians and Latvians (both 89%). Only 68% of Cypriots and 73% of Lithuanians agree with the clear information of postal services.

More people in the Czech Republic than anywhere else the information from postal services providers is unclear (12%), followed by Slovakians (11%), and Lithuanians (9%).



House persons are most apt to find the information from postal services providers to be clear (92%), and those in large towns and students say so the least frequently (82%).

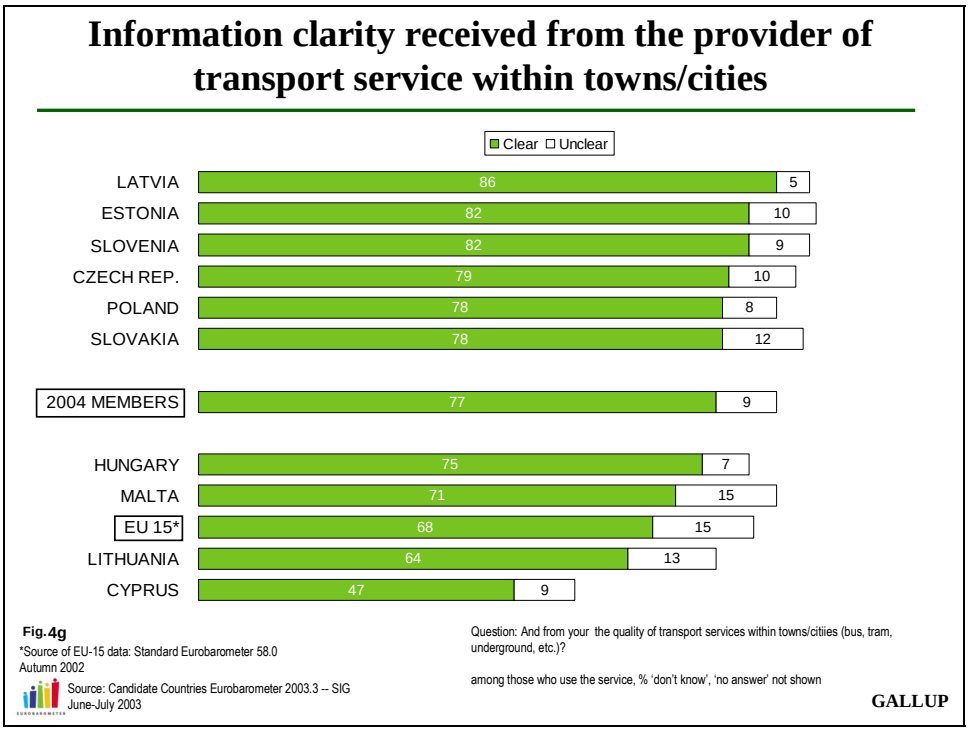
Also, 11% of the large towns' populations, 10% of those who left school at 20 or older, managers and other white collars find the information postal service providers send to be unclear. (see *ANNEX TABLES 4.6a-4.6b.*)

Clarity of information received from the providers of transport services within towns/cities

Seventy-seven percent of the acceding countries' population says the information they receive from the providers of urban transport services is clear, and only 9% say the information is unclear. A lower percentage of people in the EU say the information is clear (68%), and higher percentage say it is unclear (15%).

Latvians are most likely to find the information clear (86%), followed by Estonians and Slovenians (both 82%). The least likely to agree are in Cyprus (47% — let us remind the reader that Cyprus has a very limited formal transport system, therefore many people had no opinion in this question), Lithuania (64%) and Malta (71%).

Maltese (15%), Lithuanians (13%) and Slovakians (12%) are most likely to say the information received from providers of urban transport services is unclear.



Comparing demographic groups, other white collars are likeliest (83%), and people in rural areas are least likely (73%), to say the information they receive from providers of urban transport services is clear.

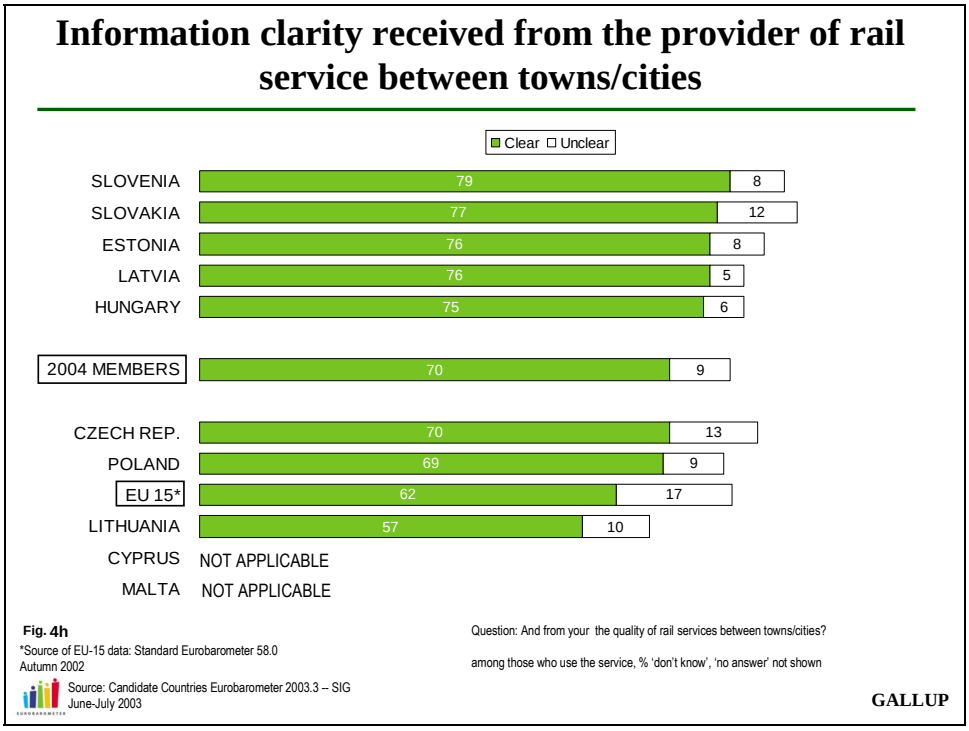
The same percentage of managers and students, 12%, say the information from transport service providers is unclear. For more information on this item, refer to *ANNEX TABLES 4.7a-4.7b.*

Clarity of information received from the provider of rail service between towns/cities

More than two thirds (70%) of the acceding countries' population find the information from inter-city rail services' providers to be clear and 9% find it unclear. (In the islands of Cyprus and Malta, there is no railway system). In comparison, people in the EU are a little less likely (62%) to judge the information provided by inter-city rail services providers to be clear, and twice as likely to judge it unclear (17%).

Slovenians (79%) and Slovak consumers (77%) most frequently say the information received from inter-city rail service providers is clear for them. Lithuanians agree the least (57%).

Czechs are most likely to say the information from inter-city rail service providers is unclear (13%), followed by the Slovaks (12%). In Lithuania the proportion of those without an opinion is the highest (33%).



Other white collar workers indicate that they find inter-city rail service providers' information to be most clear (80%), followed by self-employed (79%). But those who finished their education at or before the age of 15 are often unsatisfied (60%).

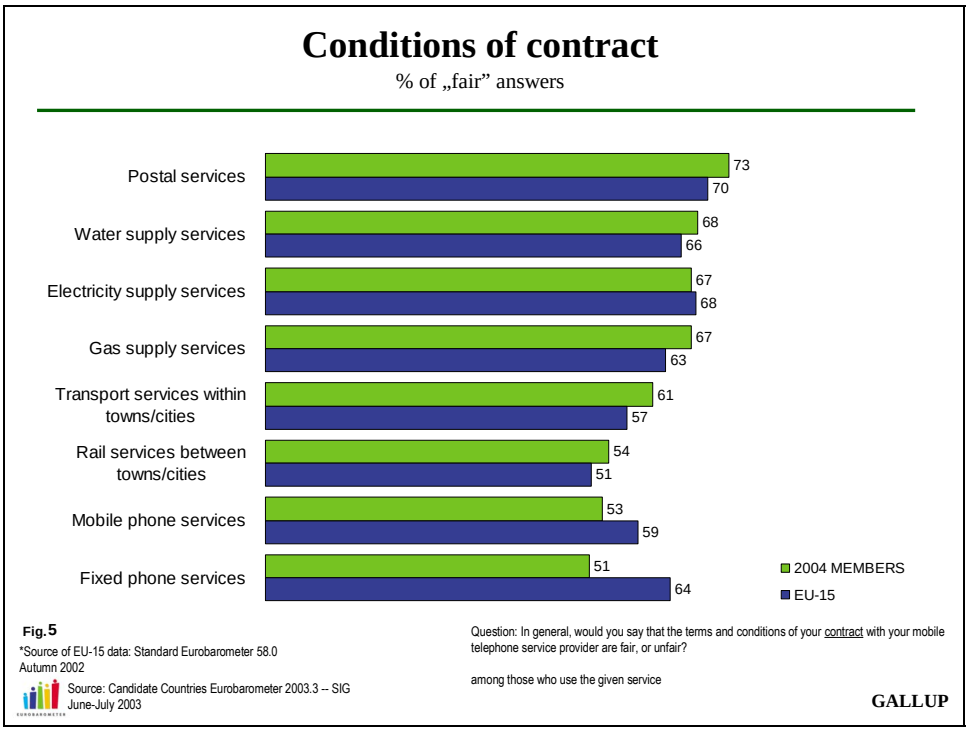
Looking at the demographic groups who find this information unclear, the list is led by people in large towns, other white-collar workers, those who finished school at 20 or older, managers, the unemployed, and 40- to 54-year-olds (11% each). Thirty-one percent of the low qualified people are non-respondents, it is the highest proportion of all. For more detailed data, see *ANNEX TABLES 4.8a-4.8b.*

5. Terms and conditions of contract

In this chapter, we present data on the opinions about the perceived fairness of contract conditions with providers of mobile and fixed telephone services, electricity, gas and water supply services, postal services, urban transport and inter-city rail services (see also *ANNEX TABLES 5.1-5.8*).

On *FIGURE 5* below we find postal services again topping the list of services of general interest with regard to the fairness of the terms and conditions postal providers offer to their services: almost three quarters in the acceding countries (73%) and seven out of ten respondents in the EU-15 (70%) believe that these conditions are fair. As we have seen in the previous chapter in connection with the clarity of information; water (68%), electricity (67%) and gas (67%) service providers follow postal services in how much consumers are satisfied with the terms and conditions of their contract with these service providers. Satisfaction with terms of service is somewhat lower if it comes to transportation (urban transport services: 61%, inter-city rail services: 54%).

Satisfaction levels are very similar in the EU-15 and the acceding countries, with the exception of the telecommunication services. Respondents in the acceding countries are less satisfied with the terms and conditions of their contract with the mobile telephone providers (53% vs. 59% in the EU-15) and much less satisfied with the fixed telephone providers in this respect (as well). For the latter, in the future member states, just above half of the users believe that the contract terms are fair (51%) while almost two thirds (64%) in the EU-15 are satisfied with the terms and conditions of the contract they have with their fixed telephone providers.

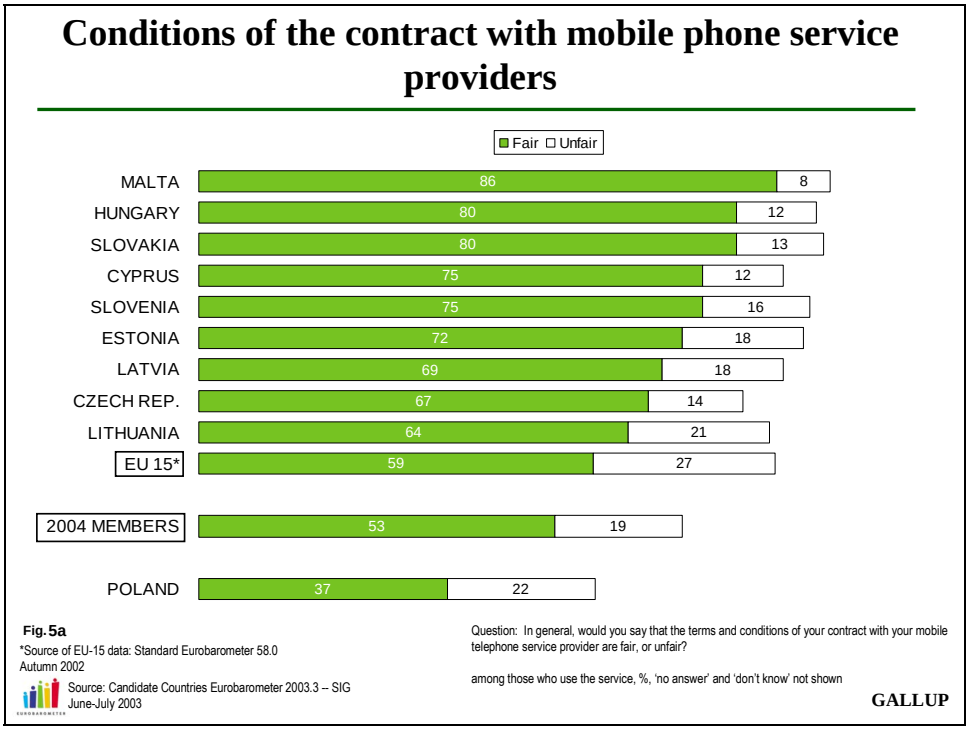


Contract conditions with mobile telephone service providers

Just a bit more than half, 53% of consumers in the acceding countries consider the conditions of their contracts with mobile telephone service providers to be fair, and 19% judge them unfair, and 28% cannot answer the question about contracts. Proportionally more people in the EU (59%) consider mobile telephone contracts to be fair, but more people consider them to be unfair as well (27%). Evidently, the proportion of those who have no opinion about the terms of their contract is lower than in the candidate region (14%).

As *FIGURE 5a* shows below, the Maltese (86%), Hungarians and Slovakians (both 80 %) are the likeliest to say contract conditions with mobile telephone services are fair, and the Polish agree the least frequently (37%) — in that country a unusually high proportion of people could not formulate an opinion in this question (41%).

Looking at those who say the contract conditions are unfair, highest numbers are present in Poland (22 %), Lithuania (21%), Latvia and Estonia (both 18%).



As demographic breakdowns show, managers find contract conditions to be fair most often (67%), and the retired would agree least often (30 %). However, high-qualified people and 15 to 24 year-old people also have the highest rate of saying contract conditions with their mobile telephone service providers are unfair (24%), followed by managers (23%). More than half of the low qualified people cannot evaluate the terms of their contract with mobile telephone provider (55%). (see *ANNEX TABLES 5.1a-5.1b.*)

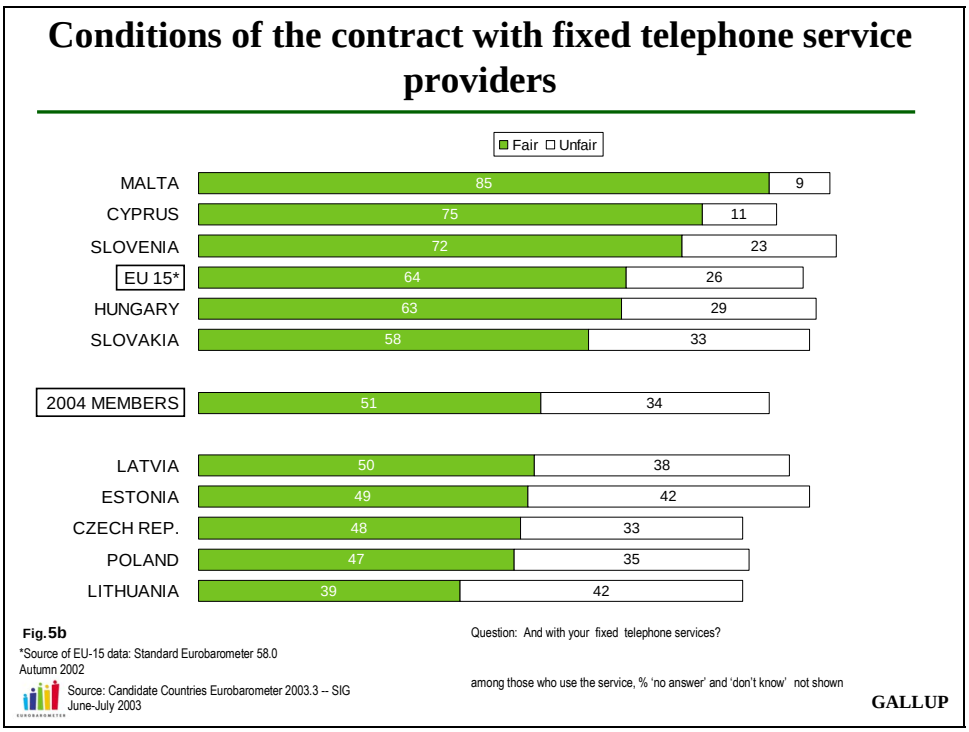
Contract conditions with fixed telephone service providers

The data show that people consider fixed telephone contracts to be unfair more often than mobile telephone — or any other — services' contract conditions. On average, 51% of the 2004 member states' population say their fixed telephone contracts are fair, and 34% call them unfair, while 15% do not know.

EU-15 respondents are more likely (64%) than those from the acceding countries to judge their fixed telephone contract conditions fair – and fewer people judge them unfair (26%), and only 10% cannot tell what they think.

There are great differences among individual countries. Taking first place, 85% of the Maltese say the contract conditions with the fixed telephone service providers are fair, followed in second place by Cypriots (75%), and by Slovenians in third place (72%). On the other hand, only 39% of Lithuanians judge fixed telephone contract conditions unfair.

Looking at the other side, one-third of Lithuanians and Latvians (42% and 38%, respectively) say the conditions are unfair, and there are rather a lot of people with the same opinion in Poland (35%), Slovakia and the Czech Republic (both 33%). The Maltese are least likely to say contract conditions are unfair (9%).



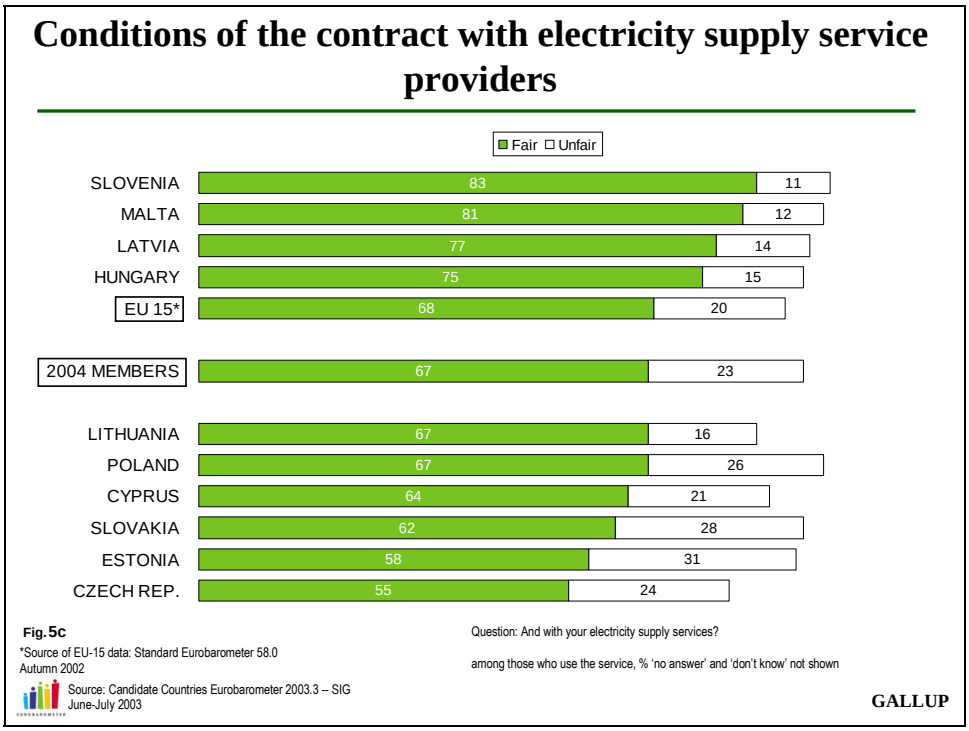
Among the socio-demographic groups, house persons are most apt to say fixed telephone contract conditions are fair (67 %). The unemployed agree in lowest numbers (46%). "Other" white-collar workers are most likely to call contract conditions unfair (41 %), followed by people in large towns (39%). For more information, see *ANNEX TABLES 5.2a-5.2b.*

Contract conditions with electricity supply service providers

Two-thirds (67%) of consumers in the acceding countries consider the conditions of contracts with their electricity providers to be fair, and less than one-quarter of them say the contrary, namely, that the conditions are unfair (23%). There is not a big difference between the percentages of "fair" answers from EU-15 countries (68%) and that for 2004 member countries regarding contract conditions with electricity supply service providers, but fewer in the EU say the conditions are unfair (20%).

In individual countries, Slovenians (83%), Maltese (81%) and Latvians (77 %) are most likely to say the contract conditions are fair, and Czechs are least likely to agree (55%).

Nearly one-third of Estonians (31%) think the contract conditions are unfair, followed by Slovakians (28%) and Poles (26%). Slovenians have the same opinion in the lowest percentage (11%).



House persons are most likely to call the contract conditions with electricity supply service providers fair (79%), and students are least likely to agree (63%).

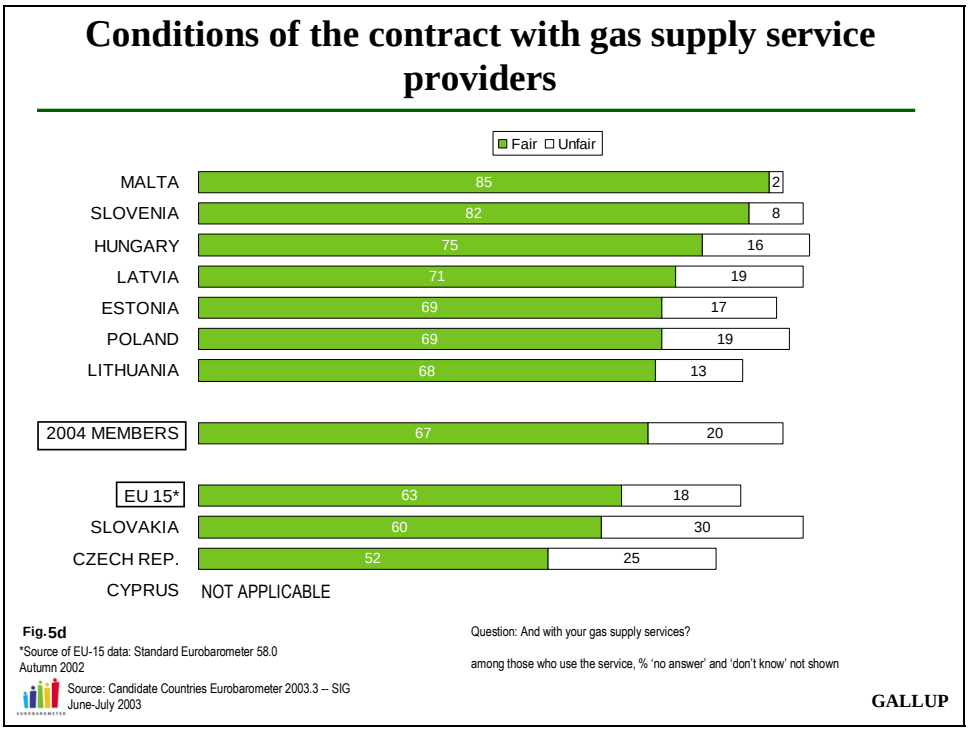
Looking at those who call these contract conditions unfair, other white-collar workers are first in line (28%), followed by a quarter of managers, the unemployed, and 40- to 54-year-olds and people in large town (26% each — see *ANNEX TABLES 5.3a-5.3b*)

Contract conditions with gas supply service providers

In the acceding countries (in those nine countries where gas supply service is available), 67% say the conditions of contract services with their gas supply providers are fair, and 20% of them say these conditions are unfair, and do not know 13% of respondents. In EU-15 countries less, only 63% consider the contract conditions to be fair, and only 18% consider them unfair, the ratio of those who can't judge the conditions is 19%.

Looking at the results country-by-country, the highest rates of people saying the contract conditions are fair are measured in Malta (85%), Slovenia (82%), Hungary (75%), Latvia (71%), Estonia and Poland (both 69%) and Lithuania (68%) -- all of these countries are over the acceding countries' average. Rates lower than the acceding countries' average are to be found in Slovakia (60%), the Czech Republic (52%).

Among those who say the contract conditions are unfair, Slovakians lead the list (30%), followed by Czechs (25%), Poles and Latvia (both 19%). Only 2% in Malta agree.



House persons (76%), young people (15-24 years) and those who left school at 20 (72% for both) are the likeliest to say contract conditions with gas providers are fair. The least likely are students (62%).

Managers (24%) and the other white-collar workers (25%) are most apt to say the contract conditions with the gas providers are unfair.

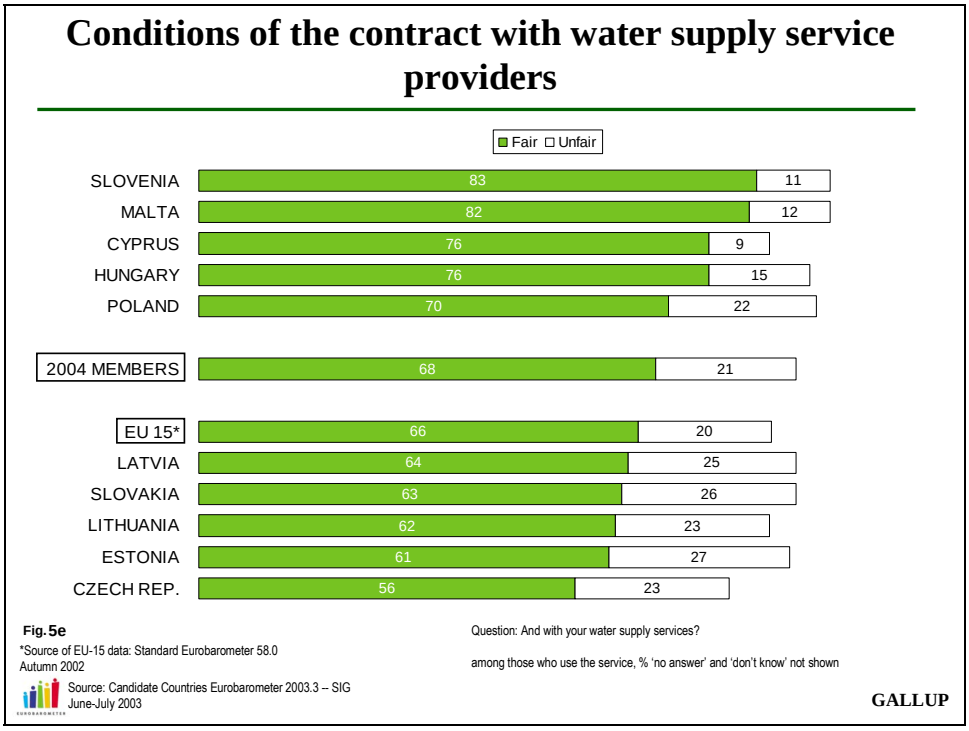
Students (26%) and the youngest people (21%) are the most likely to have no idea about the terms and conditions of the contract with the gas providers, and the same is true for all household-level public utilities, that are taken care of by their parents mostly. For more details, see *ANNEX TABLES 54a-54b.*

Contract conditions with water supply service providers

In the acceding countries, nearly two-thirds (68%) say the conditions of the contract with the water supply service providers are fair, and one in five (21%) say the contract conditions are unfair to them. Every tenth people do not know the contract or refused to answer (11%). The proportions are very similar in the current member states, with a little more people being not knowledgeable about the terms of their contract (15%), and a little less being satisfied (66%) as well as dissatisfied (20%).

As *FIGURE 5e* shows, the lowest percentage of people judging contract conditions fair is found in the Czech Republic (56%). The highest proportions are found among the Slovenians (83%) and Maltese (82%).

Twenty-seven percent of Estonians and 26% of Slovakians say the contrary, namely, that the contract conditions of water supply service providers are unfair, and 25% of the Latvians agree. Only 9% of Cypriots say contract conditions are unfair.



As in the previous questions from this subchapter, house persons are likeliest to say contract conditions with water supply service providers are fair (77%) and students are the least likely (63%). Students are the least familiar with contract of water supply (25%).

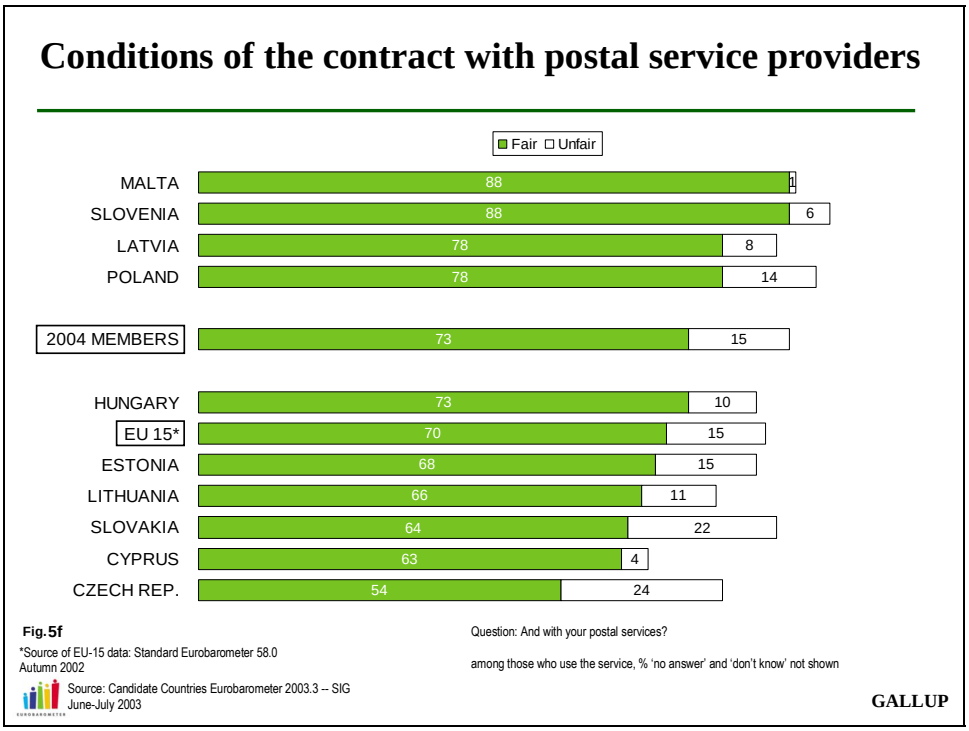
A quarter of people in large towns, unemployed and other white collars say the water-service-provider contract conditions are unfair (each 25%). (see *ANNEX TABLES 5.5a-5.5b.*)

Contract conditions with postal services providers

As we mentioned above, postal services seem to rank first in terms of fairness of contracts. Seventy-three percent in the acceding countries and 70% in EU-15 countries, say postal services provider contracts are fair. Fifteen percent in both the EU and the acceding countries say the contract conditions are unfair. Some are not able to form an opinion: 13% in the acceding countries and 16% in the present members.

As *FIGURE 5f* shows, the Maltese and Slovenians (both 88%), and Latvians and Poles (78%) are the most likely to say contract conditions with postal services are fair, and Czechs agree in the lowest proportion, but that is still more than half of the population (54%).

More than one in five consider the conditions of contracts with providers to be unfair in Slovakia (22%) and the Czech Republic (24%). We found the highest proportion of those who were not able to judge the contract details in Cyprus (32%).



From a socio-demographic perspective, house persons are most apt to say contract conditions with postal service providers are fair (80%), and people in large towns are least likely to think so (68%). Nineteen percent of managers and other white-collar workers, say the contract conditions are unfair — they probably have contact with the post business wise as well, not just as private users. (*ANNEX TABLES 5.6a-5.6b*)

Contract conditions with transport service providers within towns/cities

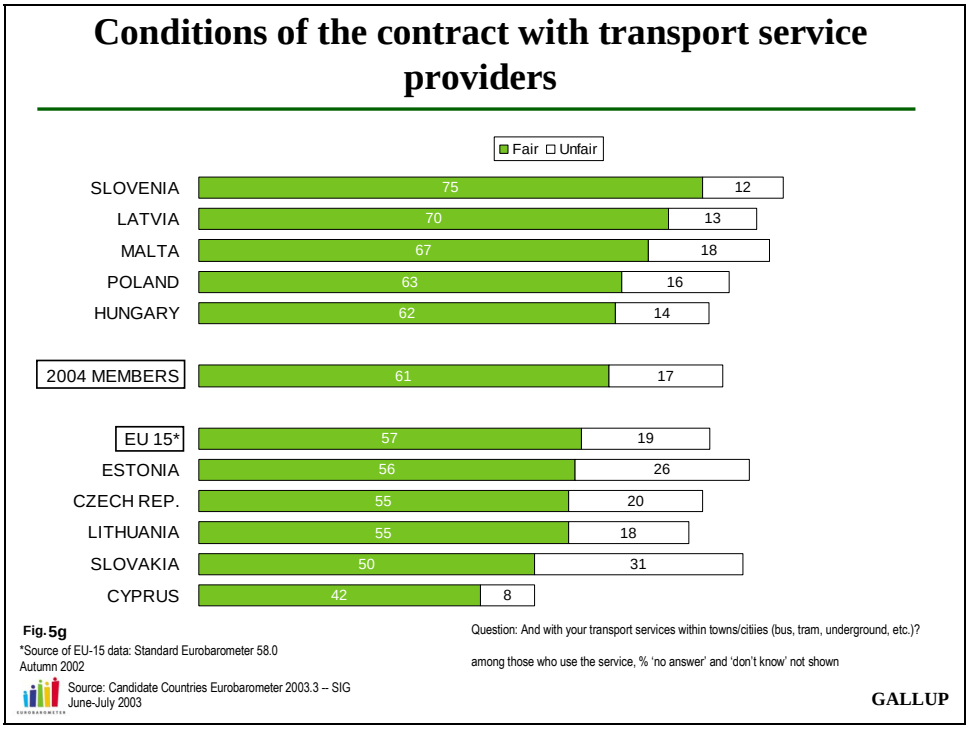
Six in ten among the future consumers of the EU-15 consider the terms of their "contract" with urban transport service providers to be fair (61%) and only 17% of them judge these conditions unfair, 22% of respondent refused or did not know the answer.

From the EU-15 countries, a smaller proportion of the respondents, 57% of the population, think the contract conditions are fair, and slightly more people, 19% of them think the contrary, 24% of them did not express any view.

At the individual country level, Slovenians (75%), and Latvians (70%) say the contract conditions are fair, and Slovakians and the Czech agree in the lowest numbers (50%, 42% respectively).

Slovakians and Estonians are the most likely to call these contract conditions unfair (31% and 26% respectively), and Cypriots are the least likely to do so (8%).

Among the Cypriots is the highest proportion of people who does not know the terms and conditions of contracts from providers of urban transport. In Cyprus, the regular, organised "public" transport opportunities are very limited.



The small or middle-sized towns' population answered more than any other group that the contract conditions with transport service providers are fair (65%), and the self-employed say so with lowest rate (54%). On the other part, again the large towns' population and other white collars think in highest number the contract conditions are unfair (both 23%). For more detailed data, see *ANNEX TABLES 5.7a-5.7b.*

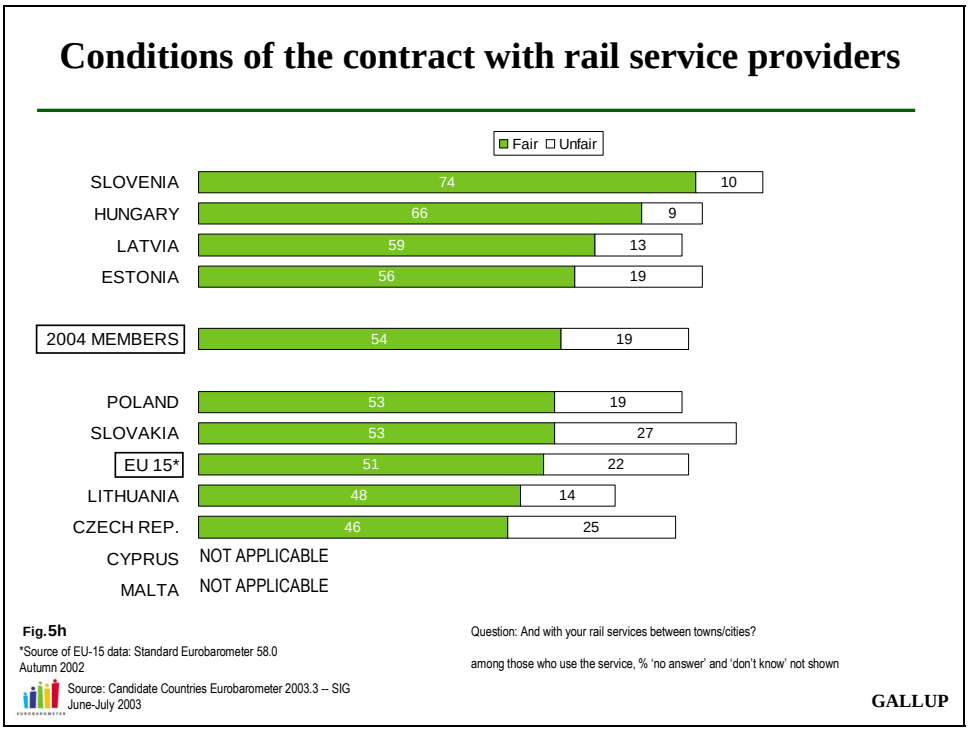
Contract conditions with rail service providers between towns/cities

Inter-city rail service is not among those services that are considered to offer fair terms and conditions for those who use the service. Still, more than half of the acceding countries say contract conditions with rail service providers are fair (54%), and just 19% of them say they are unfair, while as many as 27% do not know if the terms and conditions are fair or not. The question is of course not applicable in Cyprus and Malta -- in these countries there is no rail service at all.

A similar number in the EU-15 say the contract conditions are fair (51%), but a larger percentage than that from the acceding countries say these conditions are unfair (22%), and 27% refuses the answer (as in the acceding countries).

At the individual country level, Slovenians (74%), Hungarians (66%), Latvians (59%) and Estonians (56%) say the contract conditions are fair – all of these are above the group's average -- and Lithuanians (48%) and Czechs (46%) agree in the lowest numbers.

Slovaks are the most likely to judge these contract conditions unfair (27%), and Hungarians are the least likely to do so (9%).In Lithuania, 37% of consumers are unable to formulate an opinion on the terms and conditions of inter-city rail contracts.



More than any other group, people from 25 to 35 years call inter-city rail services providers contract conditions fair (59%), followed by young people and manual workers (58%). People in rural areas are the least likely to call these contracts fair (50%).

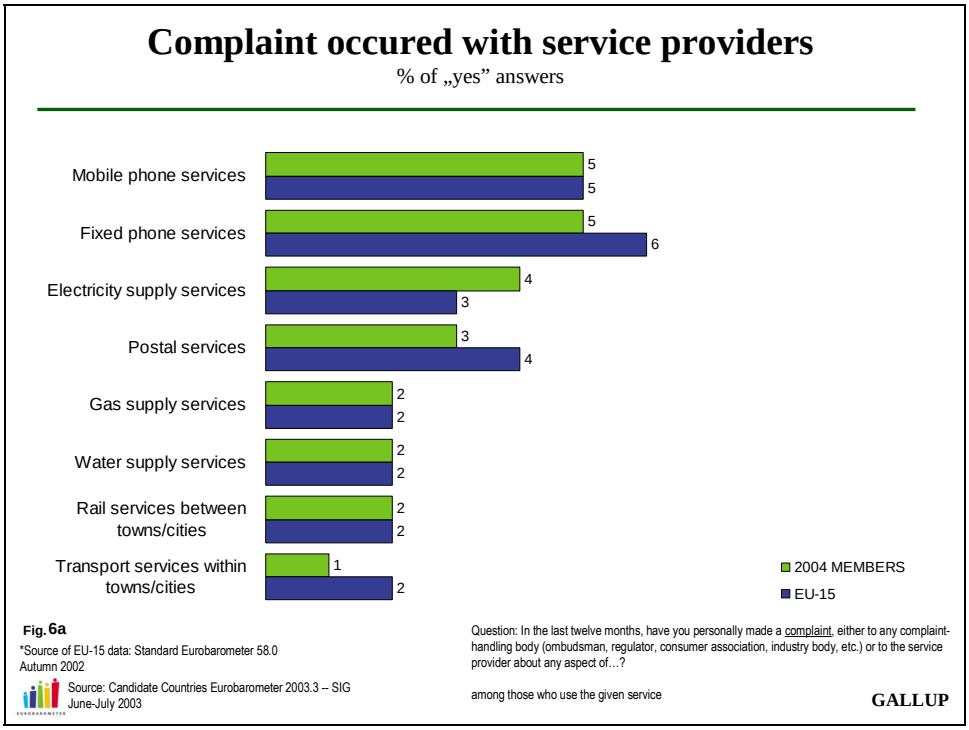
Other white-collar workers have the highest rate of saying these contract conditions are unfair (25%), followed again by people in large towns (24%). For more detailed results, check *ANNEX TABLES 5.8a-5.8b*

6. The handling of complaints

In this chapter, consumer complaints are documented, as are opinions about the success of dealing with these complaints – from the consumer's point of view - on a "very well" to "very badly" scale.

First of all, *FIGURE 6a* shows how many consumers filed a complaint in connection with the services under investigation. In both parts of Europe, telephone service providers are the most likely to be complained about. Over the past twelve months (at the time of the opinion poll), 5% of all Europeans complained about their mobile telephone provider, and the same proportion (a bit more, 6% on EU-15 level) filed a complaint about their fixed telephone providers.

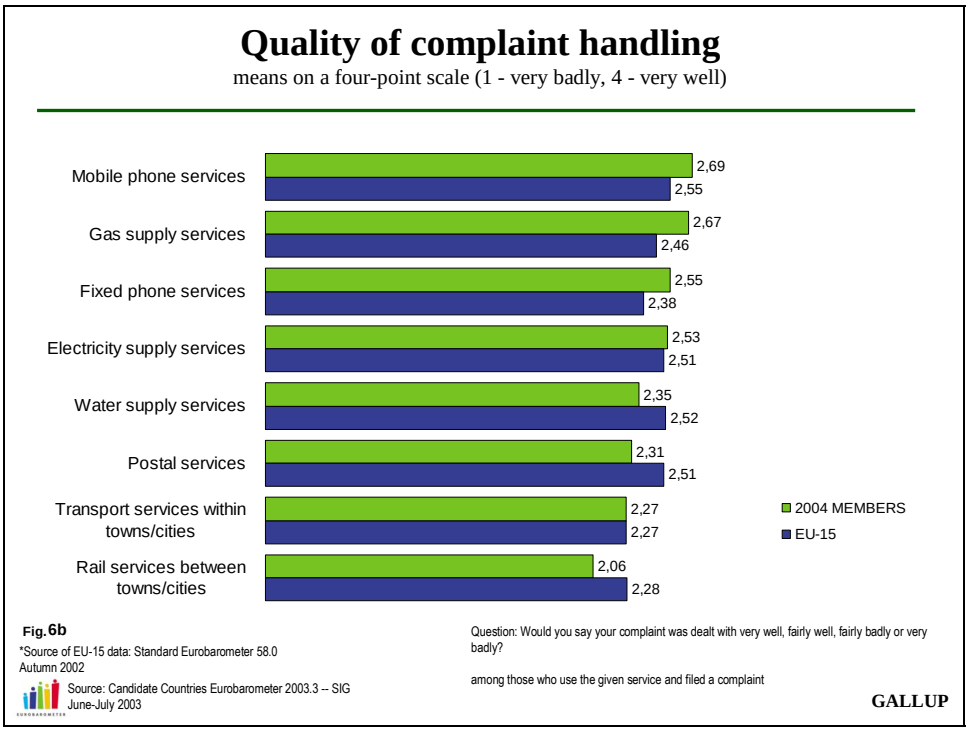
3-4% of the consumers in Europe filed a complaint against their electricity supply service providers and postal services providers. Two percent or less complained about the service they receive from their gas provider, water service provider, inter-city rail services provider, and urban transport provider, either to these providers directly, or to a complaint-handling body. The frequency of complaints is the same in the EU-15 and in the 10 countries who will join the EU in May 2004.



There are more marked differences in how successful people were with the handling of their complaints. We asked those who had filed a complaint against a service provider to evaluate how their complaint was eventually handled. From the chart above we can see that very few respondents filed a complaint during the past 12 months, therefore the sample sizes go quite low in the follow-up question that asks about the satisfaction about the handling of the complaint — especially if we investigate the results it in country, or in demographic breakdowns. Therefore we warn the reader to handle satisfaction levels with complaint handling in this micro level with good care, and we advise to check the actual sizes of the subsamples in the Appendix.

Looking at the regional results, it seems that as far as telephone and gas services are concerned, people are more satisfied in the future member states with the handling of their complaint. There is no difference in electricity supply service, and in urban transport, EU-15 consumers being more satisfied with the outcome of the complaints they filed about water, post, and rail services providers.

The general level of satisfaction with complaint handling is rather mediocre. In the acceding countries consumers' satisfaction with how their complaint was dealt with is slightly in the positive range —that is, above the 2.5 limit — for half of the services: mobile telephone, gas, fixed telephone, and electricity. In the case of the other services of general interest, people think that their complaint was dealt with rather badly than well. In the EU-15 only mobile telephone providers manage to surpass the limit and gain a marginally positive evaluation with 2.55.

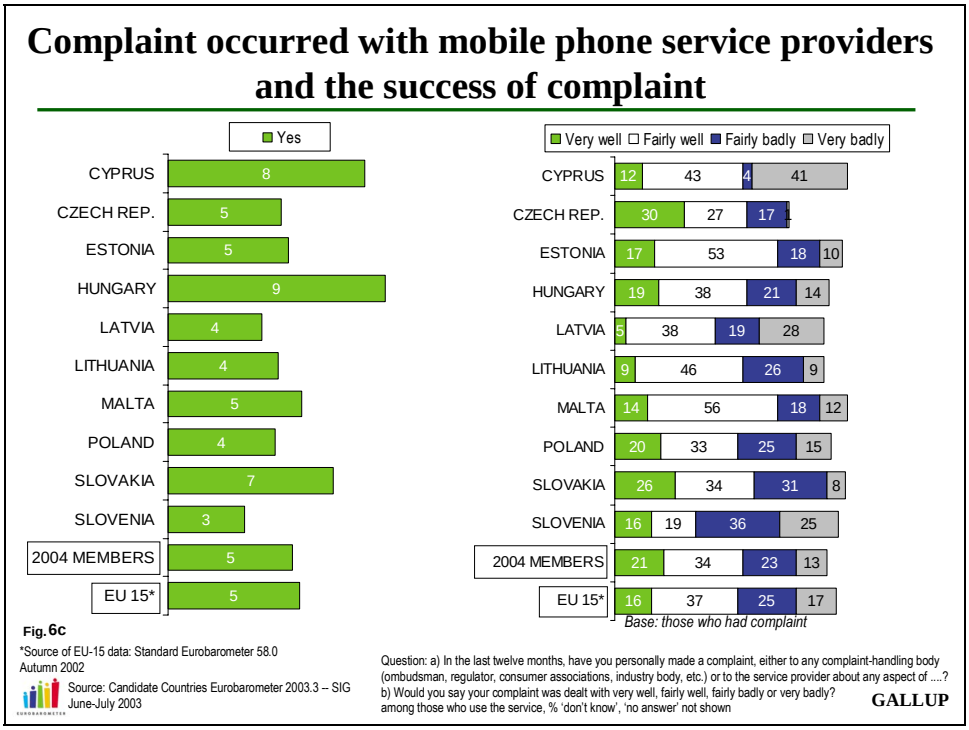


Mobile telephone service providers

First of all, consumers were asked whether they personally had made a complaint regarding mobile telephone service providers in the previous year. Results show an interesting pattern in the different countries surveyed. In comparing rates of complaint for the acceding countries and those for EU-15 countries, we find no significant differences (both rates are 5%). Besides this, in the EU-15 countries much higher proportion of people (95%) indicates that they have not made a complaint to the complaint-handling body or the service provider than say this in the acceding countries (77%).

At the individual-country level, Slovenia and Estonia have the highest percentage of respondents who did not make a complaint in the last year about mobile telephone service providers (both 95%). The proportion is also high in the Czech Republic, Latvia and in Malta (each 94%). In all countries, the rate of complaints made is less than 10%, with the lowest in Slovenia (3%), but rates of complaints are also very law in Latvia, Lithuania and Poland (in each 4%). We find the highest rates of complaints in Cyprus (8%) and in Hungary (9%).

As measured by the percentage of "very well" responses, complaints were dealt with most successfully in Cyprus (41% of respondents there say their complaint was dealt with very well) and in Latvia (28%). The least satisfied are the Czechs; 30% of respondents there feel their complaint was dealt with very badly. High percentages of "very badly" responses are also found in Slovakia (26%) and in Poland (20%).



Taking a look at the age categories, it is apparent that younger people (25-39 years) made complaints in higher proportions (7%) than older ones did (55+ years: 1%). Managers (9%) were much more likely to complain to a complaint-handling body or the service provider than house persons, self employed or retired people were (each 4%).

According to 29% of female respondents, the problem was dealt with very well. Males are less satisfied with the way the complaint was dealt with (15%). As for the age groups, the younger generation was more satisfied with the way the complaint was dealt with (34%: 15-24 years as against 14% by the 55 years and older). There is a huge difference between managers and house persons. Managers are the most satisfied with the way the problem was dealt with (29%), while only 1% of house persons express total satisfaction. As for the locality, 22% of respondents from rural areas or

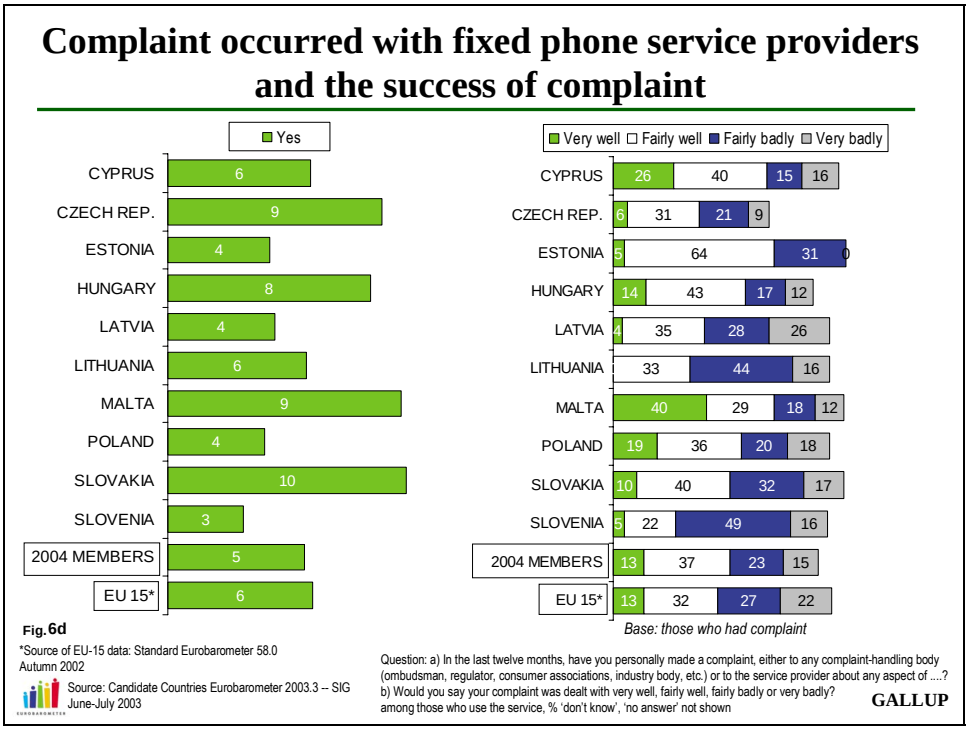
villages say their complaint was handled very well, while the proportion of respondents from large towns saying "very well" is smaller (16%).

Fixed telephone service providers

Regarding complaints to fixed telephone service providers in the last year, at first glance, the Slovakians complained in the highest proportion (10%). The percentage complaining is lower than 10% in all other countries. We find the lowest percentage in Slovenia (3%), but there are also very low figures in the case of Estonia, Latvia and Poland (4% each). Slovenia (96%) has the highest percentage of respondents who indicate they have not complained about fixed telephone service in the last year. As measured by the percentage of "very well" responses, dealing with complaints was done most successfully in Malta, where 40% of respondents state that their complaints were dealt with very well. Latvian (26%) and Polish (18%) respondents are most likely to say their complaints were handled "very badly."

Taking a detailed look at the demographic data, we can see males had a higher proportion of complaints regarding fixed telephone service providers (7%) than did females (4%). Twice as much proportion of 25-39 aged respondents said that they have made complaints than the 15-29 aged people or the 55 years old or older (8% as against 4% for both age groups). There is again a wide difference between responses of managers and those of house persons: 11% of managers had a complaint, while only 5% of house persons turned to a complaint-handling body or the service provider personally in the previous 12 months.

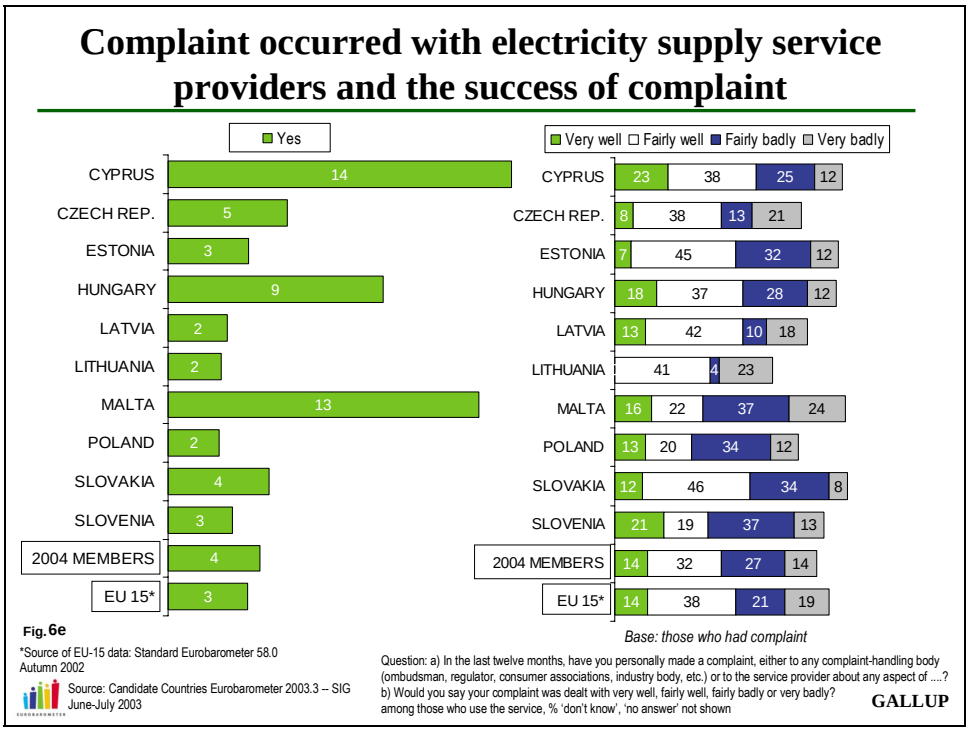
As for the way the complaint was dealt with, 19% of females said it was handled very well, while only 9% of males shared this opinion. Those in the 40-54 years old age group (19%) say their complaints were dealt with very well in a higher proportion than younger respondents do (15-24 years old: 4%). Manual workers are much less satisfied with way their complaints were handled (4% of "very well" answers) than are self-employed respondents (24%).



Electricity supply service

Complaints about the electricity supply vary from the pattern for the previous services. Cypriots (14%) and Maltese (13%) are most likely to have made complaints about electricity service in the previous 12 months, followed by Hungarians (9%). Poles and Slovenians (both 97%) are most likely not to have complained in the previous year. Lithuanians (23%) and Maltese (24%) are most likely to express that the complaint was dealt with very badly. Cypriots are most likely to say the complaint was handled very well (23%), followed by Slovenians (21%).

As for the demographic groups, 15 to 24 year-old respondents complained to a complaint-handling body or the service provider in a relatively small proportion (2%), while this proportion is higher in the 25-39 years-old group (5%). Managers had a much higher percentage of complaints (9%) than did those who are self employed (2%).

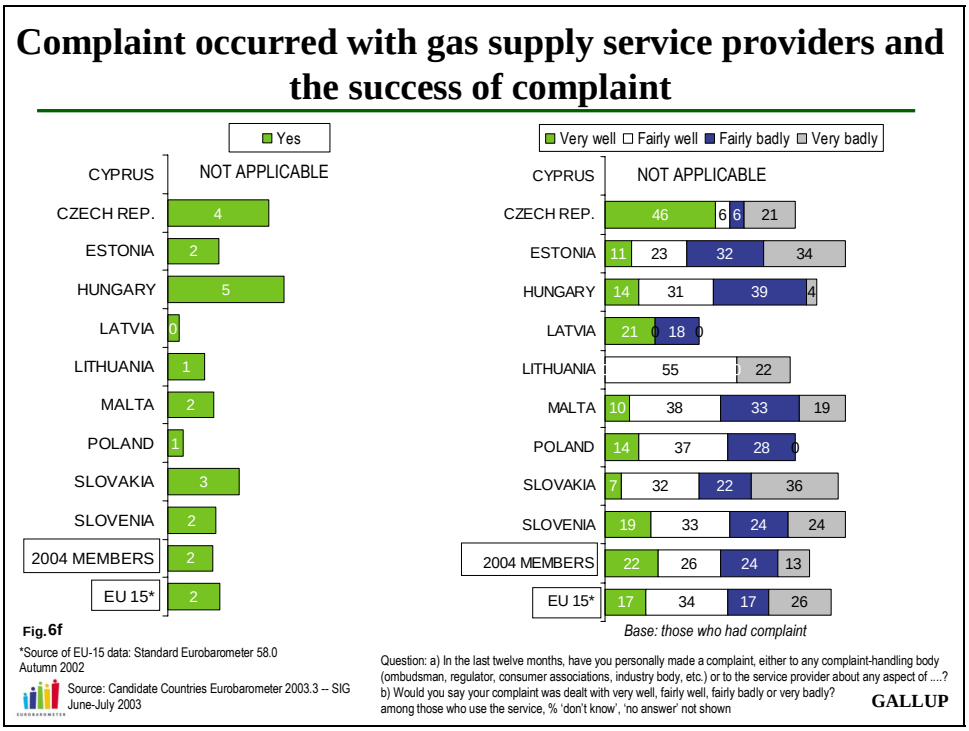


Gas supply service

In the acceding countries, the greatest prevalence of respondents saying they made a complaint about gas supply services in the last 12 months is among Hungarians (5%) and Czechs (4%). Both in EU-15 countries and in the acceding countries overall, only 2% of respondents turned to a complaint-handling body or the service provider during the previous 12 months. Latvians, Poles and Lithuanians were least likely to make a complaint (less than 2%, respectively).

The most satisfied people about the handle of their complaint we find in the Czech Republic, where almost every second respondents (46%) said that was dealt with "very well". About the same percentage of respondents in Latvia (21% of those who had a complaint) and Slovenia (19%) say their problem was dealt with very well. Those least satisfied are the Slovakians (36% say their complaint was handled "very badly") and Estonians (34%).

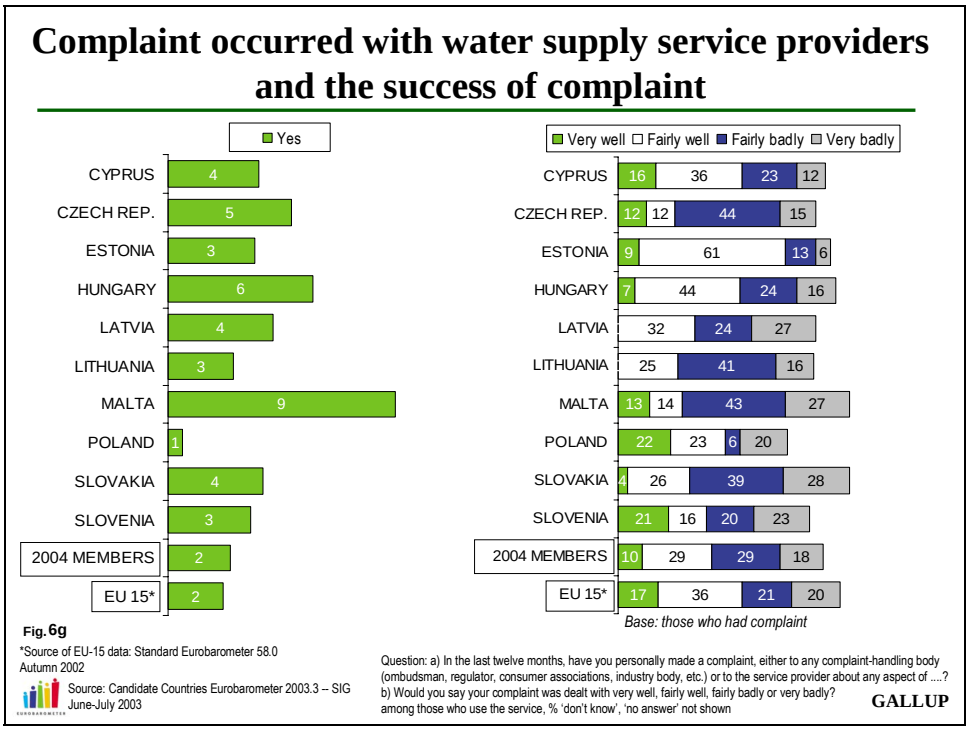
The socio-demographical analysis shows no significant differences between the respondents from the average (2%) about this question by age groups, terminal education level or main economic activities.



Water supply service

In both EU-15 countries and acceding countries, only 2% of respondents made a complaint to a complaint-handling body or their service provider in the previous 12 months. The Maltese are most likely to have made a complaint (9%), followed by Hungarians (6%). Only 1% of Poles made a complaint in the previous 12 months.

As for the process of dealing with complaints, 13% of Maltese and 7% of Hungarians who made a complaint say their complaint was handled very well. Among the Latvians and the Lithuanians there is nobody who thought that their complaints were handled "very well" — but as we warned above, the sample sizes here are very small.



Postal services providers

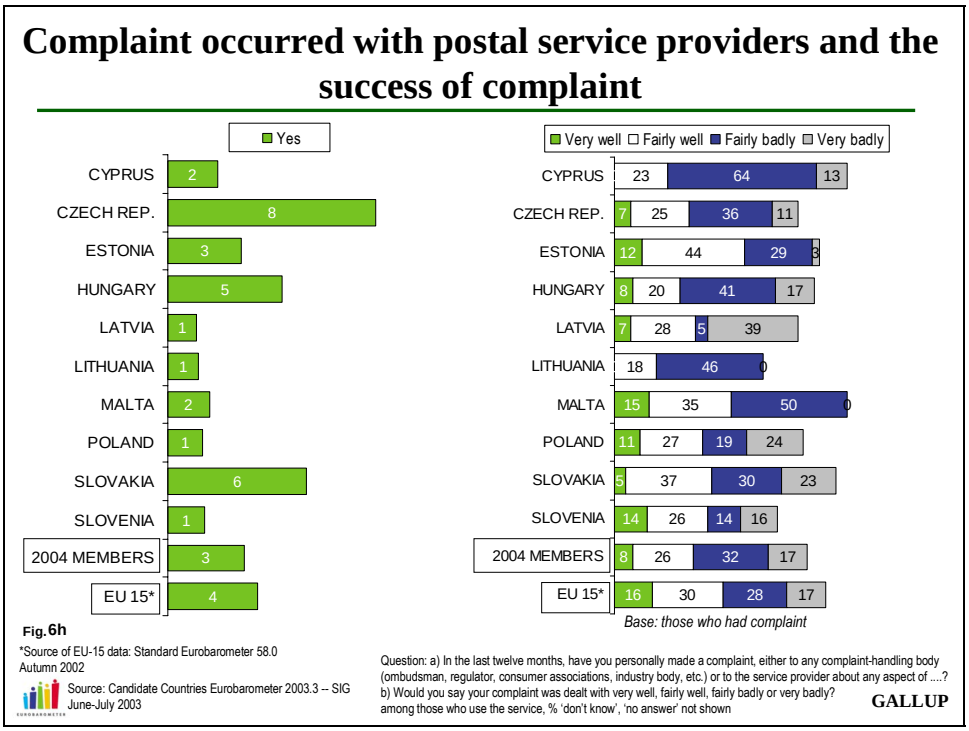
There are no relevant differences between the average of EU-15 and the acceding countries, only 4% on EU-15 level and 3% of the respondents in the 2004 member states turned to a complaint-handling body or their postal services provider to complain. Respondents from the Czech Republic are most likely to have made a complaint about their postal services providers (8%), followed by Slovakians, with 6%. Only 1% of Poles, Latvians, Lithuanians and Slovenians say they made a complaint.

Those who had completed their studies at age 20 or older were more likely to complain (5%) than were those who finished their studies by age 15 (1%).

As for the complaint-handling process, the most satisfied respondents are the Maltese – 15% of them said that their problem were handled very well – followed by Slovenians (14%), Estonians (12%) and the Polish (11%) – above the 2004 members average.

By taking a look at the demographic groups it seems that, females are more satisfied with the complaint-handling process (11% of them express that their complaint was dealt with very well, compared to 5% of males). Satisfaction is higher in the youngest (10%) and in the oldest (11%) age group than by the respondents between 25 and 39 years old. The self-employed respondents are rather satisfied than others – 19% of them mentioned that their complaints were handled very well.

Inhabitants of rural areas or villages express the highest satisfaction (15% of "very well" answers), while respondents from small or middle-sized towns are least satisfied (4%).

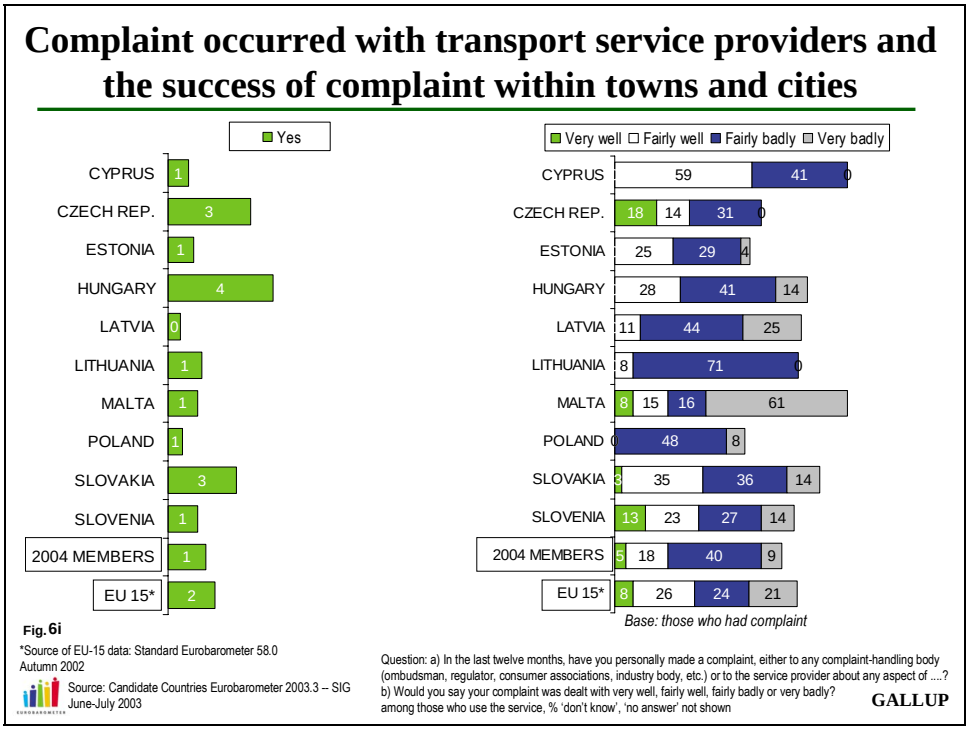


Transport service providers within towns/cities

Fewer respondents made a complaint about urban transport services providers than did so about the service providers previously mentioned. Altogether, 1% of respondents from the acceding countries and 2% of respondents from the EU-15 countries turned to a complaint-handling body or the service provider to complain. As for the individual country results, Hungarians made a complaint in the highest proportion (4%). Those few who complained are quite likely to be dissatisfied with the results.

If we take our number on face value, satisfaction with the process of dealing with complaints is the highest in the Czech Republic (with 18% of those who made a complaint indicating it was handled very well), followed by Slovenia (13%). The least satisfied are the Maltese (61% of them expressed that their complaint was handled very badly). But these differences can easily come from sampling error, since the sample sizes are so minimal.

With the same warning: males seem to be more satisfied with the complaint-handling process (8% of them said that their complaint was handled very well) than are females (2%). Younger people between aged 25 and 39 (11%) are more satisfied than other age groups. There is a large difference between the opinions of the inhabitants of rural areas or villages (25 % say their complaint was dealt with very well) and those of small or middle-sized town (not even 1% of this group says "very well").

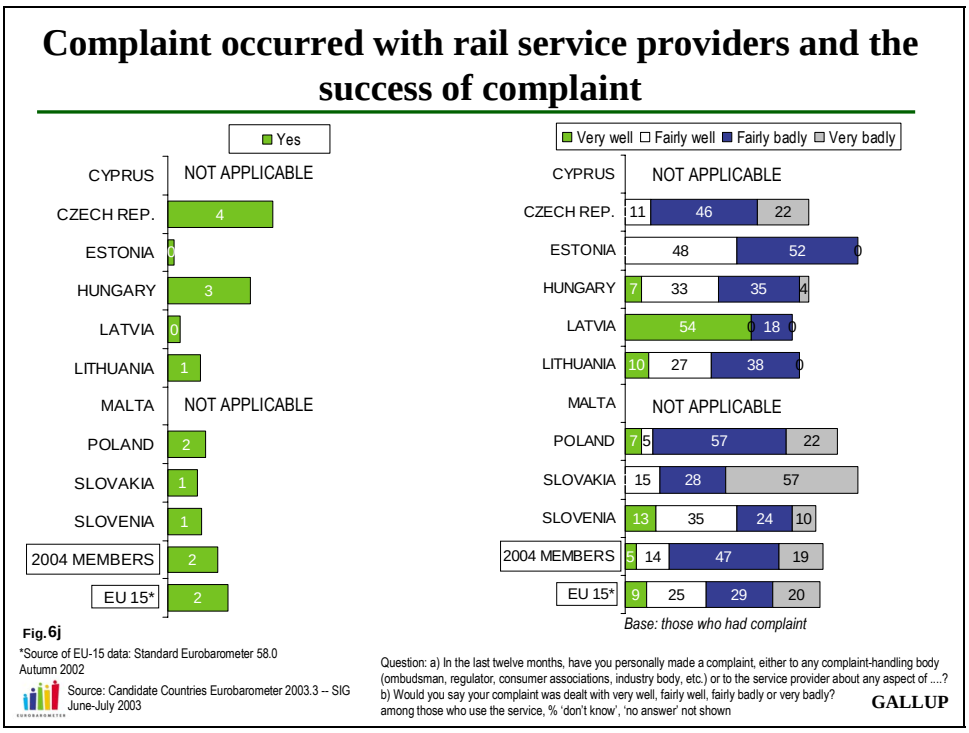


Rail service providers between towns/cities

The proportion of people who made a complaint about inter-city rail services providers is also very low, almost negligible. It does not exceed 4% in any country. The lowest proportion is in Latvia and Estonia (both 0%), while the highest is in the Czech Republic (4%). Taking a closer look at the satisfaction results, Slovenians appear to be the most satisfied with the complaint-handling process (13% say their complaint was dealt with very well). On the other hand, 57% of Slovakians respondents express that their complaint was handled very badly. Czechs and Poles have somewhat high percentages indicating dissatisfaction with complaint handling (in the Czech Republic and in Poland 22% say their complaint was dealt with very badly).

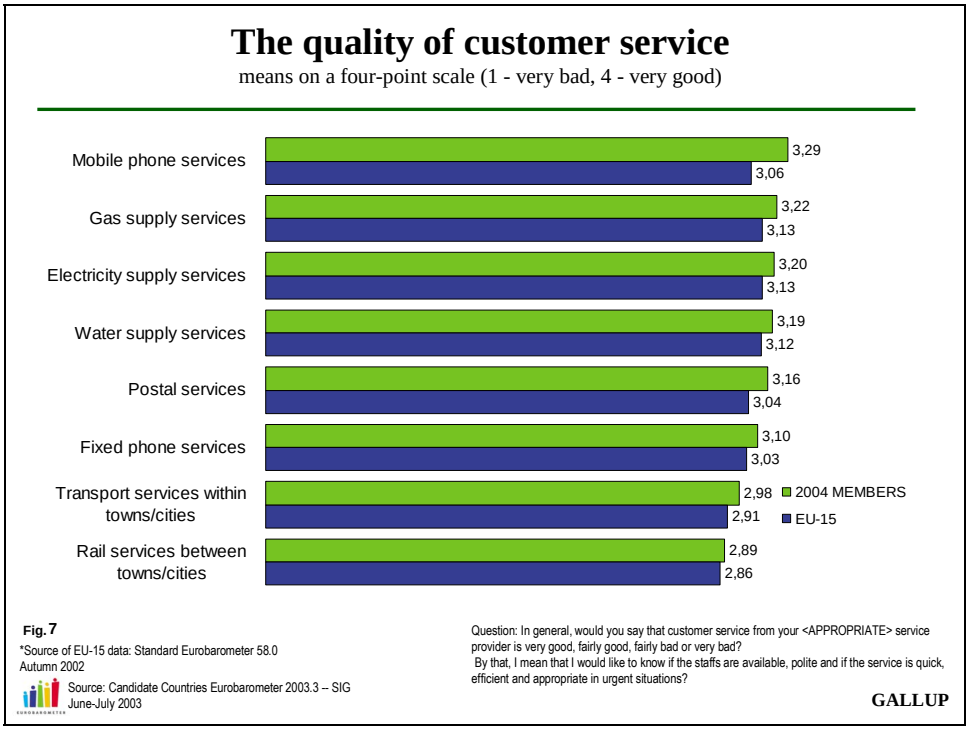
There is not any essential difference among in the likelihood of males and females to have made a complaint in the past 12 months about rail service providers; 3% of males made a complaint, compared to 1% of females. However, when it comes to the satisfaction results, there is a difference in responses by gender. For males, 23% say their complaint was dealt with very badly. Females are more satisfied with the complaint-handling process regarding rail service providers – 10% say their complaint was dealt with "very well", while only 3% of the males express the same opinion.

By age group, older respondents are the most satisfied with the way their complaint was dealt with: 17% of those 55 and older say the complaint-handling process went very well, versus only 1% for 25- to 39-year-old respondents.



7. Customer service

In this chapter, we will take a detailed look at the quality of the different services, as to how satisfied the respondents are with customer service of each of the services of general interest this report covers. Under customer service we meant — as we explained to our respondents as well — the followings: the staffs are available, polite and if the service is quick, efficient and appropriate in urgent situations. We measured overall opinions on a 4-point scale from very good to very bad.



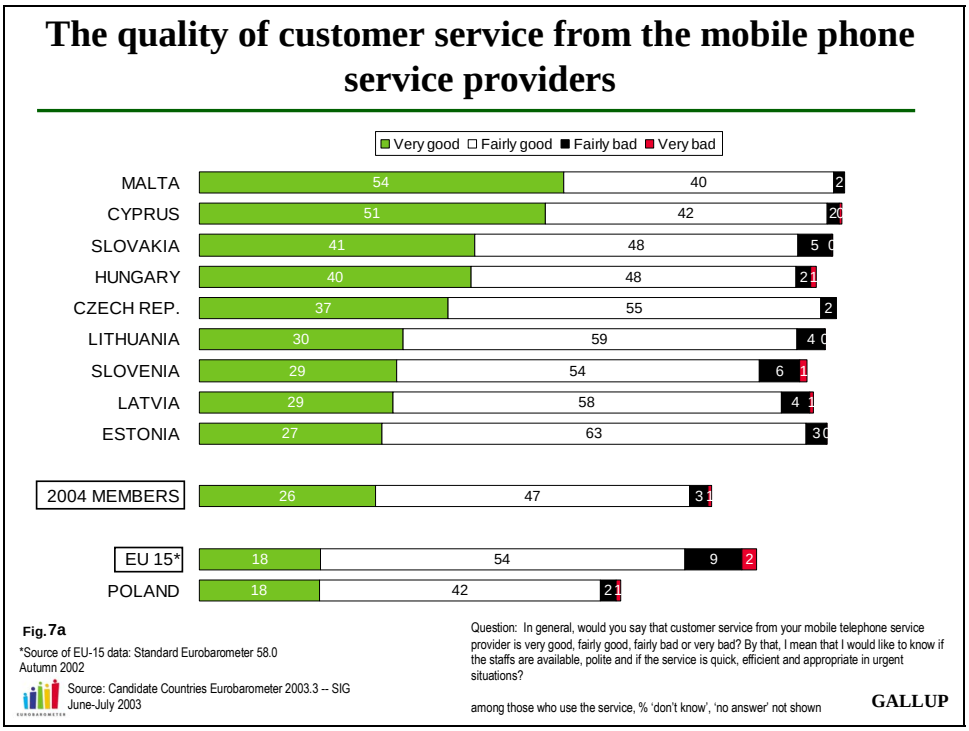
Focusing on the overall picture, we find that in the acceding countries mobile telephone providers treat their customers the best, while in the EU the utility providers (gas, electricity, water) get the best results for customer service. These three service providers follow the mobile telephone providers in the acceding countries as well. Postal services come fifth, fixed telephone providers are the sixth, and across Europe, the two transport services (urban transport and inter-city rail service) are considered to be the worse from the customer service point of view.

The general level of satisfaction remains in the positive range with all services scoring around the 3, 'fairly good' level. In fact, only the customer service of public transport and rails service scores below this level.

Mobile telephone service providers

First of all, respondents were asked about the customer service of the mobile telephone service providers. The Maltese are most likely to say customer service for these providers is "very good"; 54% of them say this. Cypriots (51%), Slovakians (41%) and Hungarians (40%) are next most likely to say "very good." The least likely to say "very good" are the Poles (18%) but a very high proportion of them said they do not know. Eighteen percent of the EU-15 countries say "very good," while 8% more, 26%, say this in the acceding countries.

Looking at the demographic data, 32% of the 15-24 age group say the customer service of the mobile telephone service providers is very good, compared to only 15% of respondents 55 years old and above. Those who are still studying are more favourable toward the customer service of the mobile telephone service providers (55%) than are respondents who finished their studies by age 15 (25%).

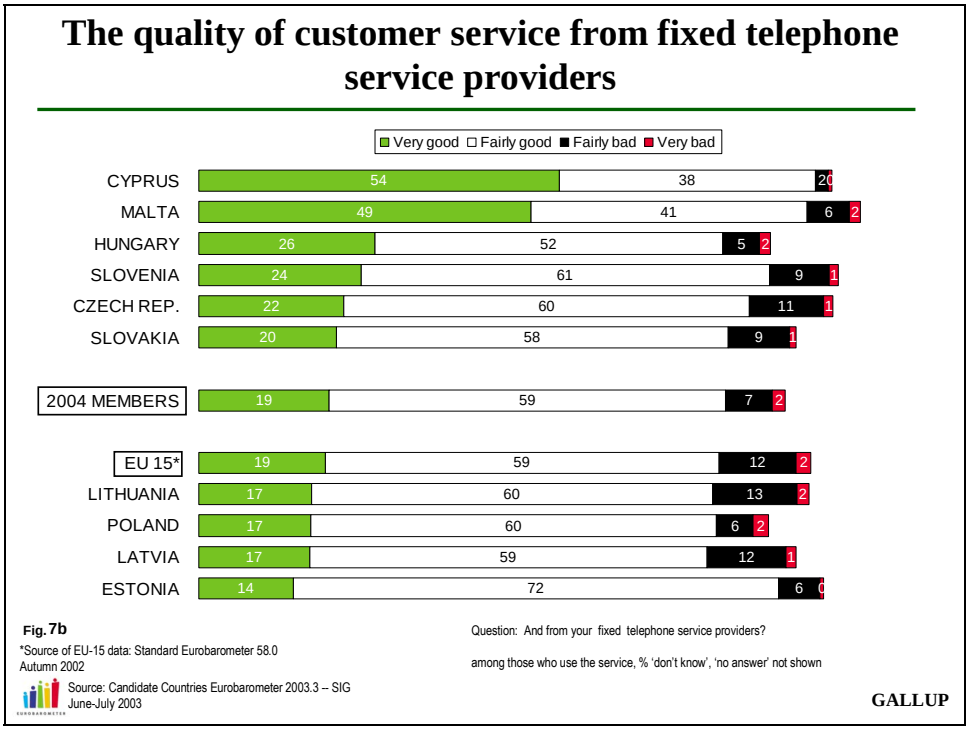


Fixed telephone service providers

Regarding satisfaction with customer service of fixed telephone service providers, Cypriots are most satisfied with the customer service (54% of them express that it is very good). Maltese respondents are next most satisfied, with 49% saying customer service is "very good."

There is no difference between the EU-15 countries and the acceding countries, in terms of the percentage of respondents who say "very good": in both cases it is 19%. The least satisfied, in terms of percentage of "very good" responses, are the Estonians (with 14%), but also Lithuania, Poland and Latvia are below the 2004 members average (19%); only 17% in each country express top satisfaction with the customer service of the fixed line telephone service providers.

Looking more closely at the demographic criteria, there is no essential difference between the responses of males and females to this question ("very good" responses received from 18% of males and 20% of females). As for the studies, those who finished their studies at 16-19 years of age (20%) are more satisfied than are those who left schools by age 15 or are still studying (17% in both group).

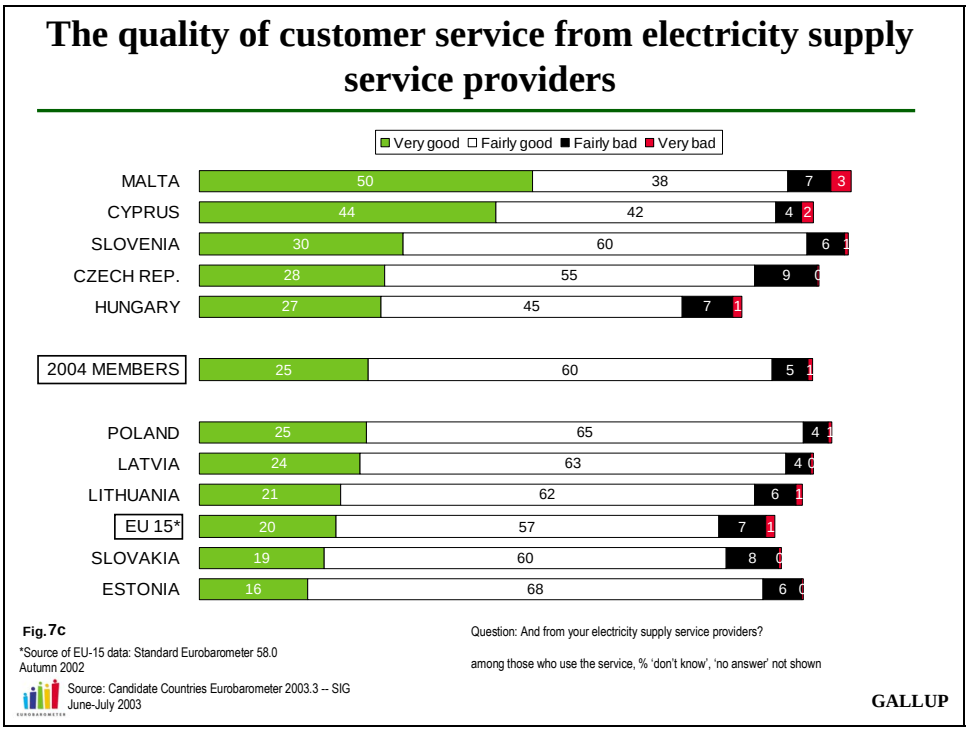


Electricity supply providers

The vast majority of those from the acceding countries are satisfied with the electricity supply providers' customer service quality -- 85% give either "very good" or "fairly good" responses.

As they were for mobile telephone service providers, the Maltese are again at the top in terms of satisfaction with the quality of customer service from electricity supply service providers: 50% of them say the quality is "very good." Cypriots are in second place, with 44% "very good" responses, followed by the Slovenians (30%). On EU-15 level, the proportion is 20%, while the acceding countries have a higher proportion of "very good" responses regarding customer service quality (25%). The Estonians have the lowest proportion of "very good" answers -- 16% of them say this.

Managers, manual workers and house persons indicate higher satisfaction (28% of each group express that customer service from electricity supply providers is very good) than other white collars and unemployed do (both 21%). Inhabitants of smaller or mid-sized towns are more satisfied with the customer service (22%) than are respondents from large towns (22%) or rural areas or villages (23%).

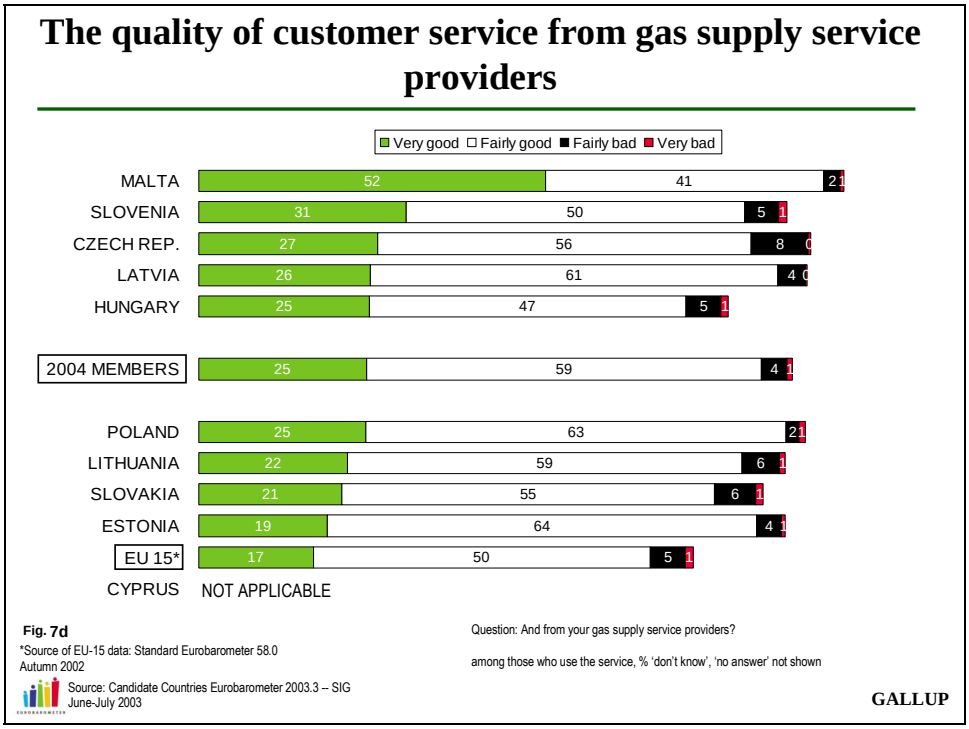


Gas supply providers

Satisfaction with the customer service quality from gas supply service providers shows the following picture: Malta (where 52% say the quality of service is "very good"), Slovenia (31%) and Czech Republic (27%) occupy the first three places. Latvia (27%) on the fourth place and Hungary (25%) as the fifth are also above the acceding countries' average. In the 2004 member states 25% of respondents expressing the opinion that customer service is very good, which is higher than the results for the EU-15 countries (17%). Estonian respondents are the least satisfied with the customer service of the gas supply service providers (19% of them express that it is "very good").

At the socio-demographic level, house persons and "other white collars" differ regarding their satisfaction with the customer service of their gas supply provider. While only 22% of the house persons say the service was "very good," a higher proportion of the managers do so (31%).

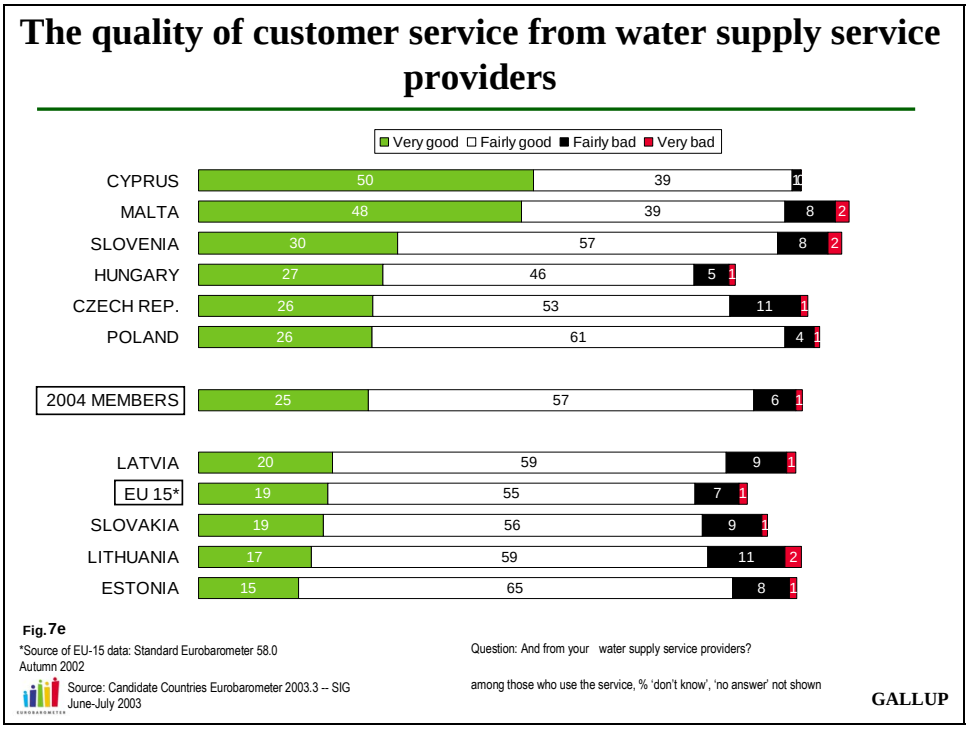
Inhabitants living in small or mid-sized towns are more satisfied with the customer service of the gas supply service providers (30% say it is "very good") than are respondents living in other localities (21% for rural areas or villages, and 23% for large towns).



Water supply providers

Regarding water supply providers, the rank of the countries, in terms of their percentage of "very good" responses, is somewhat different from their rank in the rating of gas supply providers. Cypriots are first, with 50% saying customer service quality for water supply providers is "very good." The Maltese (48%) and the Slovenians (30%) are in second and third places, respectively. Acceding countries are more likely than the EU-15 countries to say customer service from water supply companies is "very good" (24% versus 19%). Estonian respondents are the least satisfied with customer service of the water supply service providers (13% of Estonian respondents express that it is very good).

At the socio-demographic level, there are differences in terms of studies: who still studying are less satisfied (23 than are those who finished their schooling by age 15 (27%). There is an essential difference between house persons and "other white collars": only 21% of the other white collars express that the customer service of the water supply providers is very good, while 27% of house persons are of that opinion.



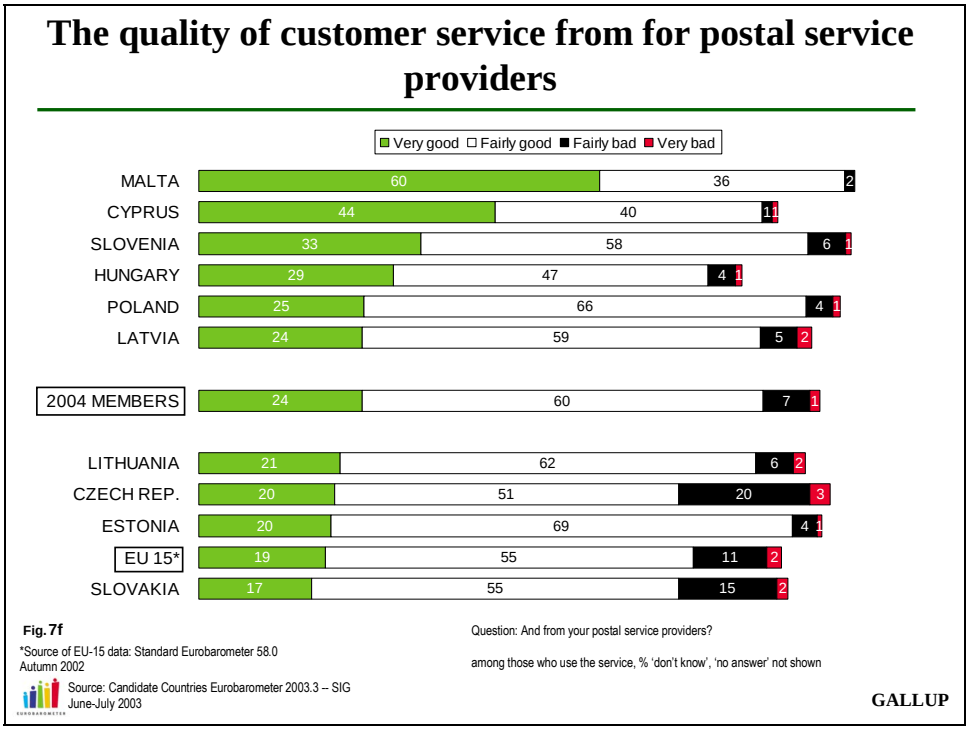
Postal services providers

The acceding countries again have higher "very good" percentages than do the EU-15 countries (24% and 19%, respectively).

Looking at the individual country results, there are large differences between the top two countries and the other countries, in terms of their "very good" answers. The Maltese again lead the way, with 60% of respondents expressing high satisfaction with the customer service of the postal services providers. They are followed by Hungary (29%), Poland (25%) and Latvia (24%) – which countries are above the acceding countries' average.

Respondents from Estonia, the Czech Republic and Slovakia are the least likely to give "very good" responses, with 20%, 20% and 17%, respectively, saying this in the three countries.

Looking at the demographic data, we can see that youngest respondents are less satisfied than are oldest ones: 22% of 15-24-year-olds express that the customer service of postal services providers is very good, while 26% of those aged 55 and older say the same. It seems that house persons and retired people are more satisfied in this case (28% and 27% respectively "very good" responses) than are those who belong to the other white collar - category (18%).

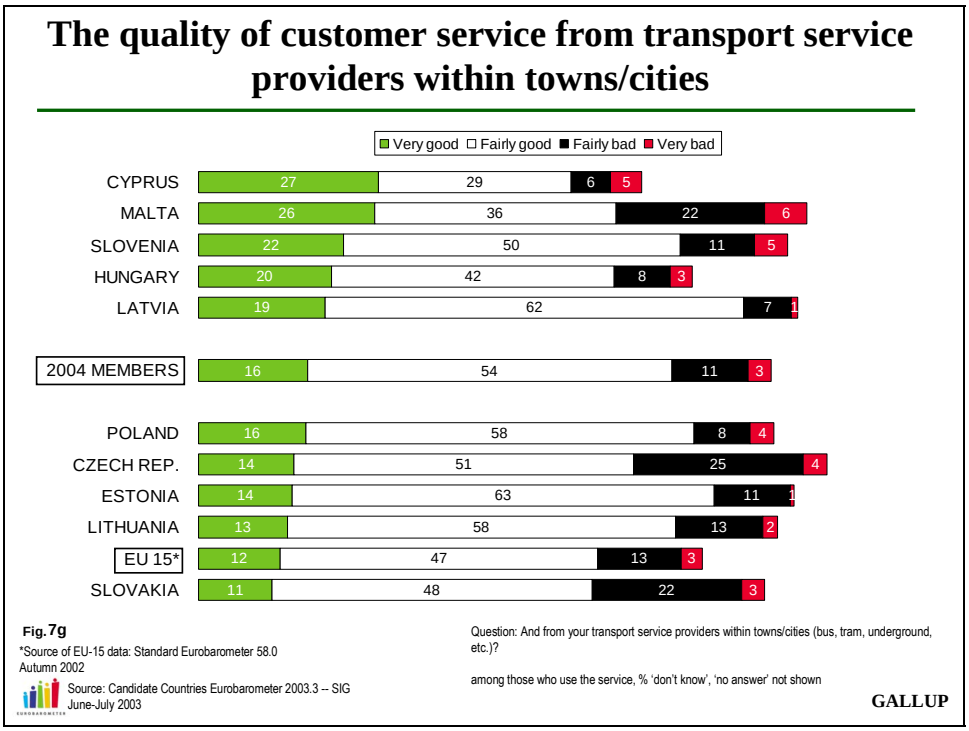


Transport service providers within towns/cities

Respondents in general rate the quality of the customer service from urban transport services providers much lower than they rate the service from the previously mentioned providers. The proportion of "very good" answers from acceding countries is somewhat higher, than in the EU-15 countries (16% as against 12%).

Cyprus comes in first place, with 27% of its respondents expressing top satisfaction (although many peole have no idea about the quality of the customer service of the transportation authority), followed by the Maltese (26%) and Slovenians (22%). Estonia, Lithuania and Slovakia are the countries least likely to rate customer service "very good," with 14%, 13% and 11%, respectively, saying this.

At the socio-demographic level, the results show differences between managers and house persons, as with the previous services but this time house persons are more satisfied (20%) than managers are (15%).



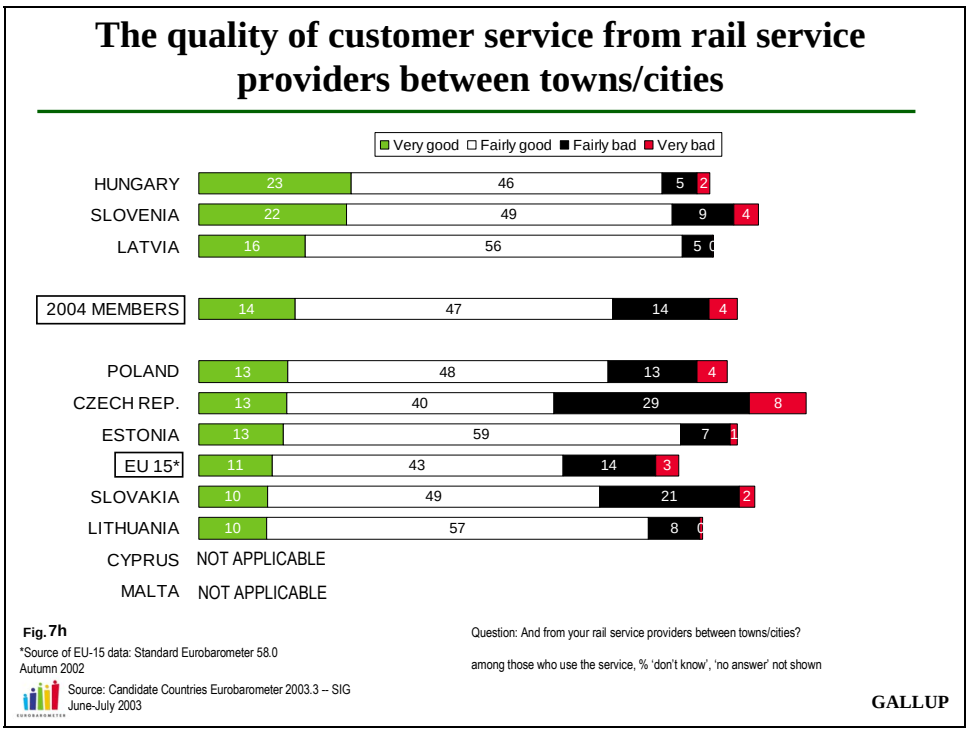
Rail service providers between towns/cities

Respondents from the acceding countries are a little bit more satisfied with the quality of inter-city rail services providers between towns or cities than respondents in the EU-15 countries.

The percentage of "very good" responses on 2004 members level for the quality of inter-city rail services providers 14% whereas in the current member states this ratio is 11%.

The customer service quality of the inter-city rail services providers is the lowest among the various services for which questions were asked. At the top, in terms of percentage of high satisfaction with rail service providers, are the Hungarians (23%), tightly followed by Slovenians (22%). On the third place Latvia can be found with 16% of "very good" answers. Slovakia and Lithuania have the smallest percentage of "very good" opinions, with 10% (both). The question is not applicable to the Cypriots and Maltese respondents.

Looking at the demographic data for inter-city rail services providers, the youngest and the oldest age group are more likely to indicate high satisfaction with customer service: 16% of 15-24 years old and in the same proportion of 55 years old and elder answered "very good" to this question. 16% of small or middle-sized towns' inhabitants express top satisfaction ("very good" responses) with the customer service of their rail service provider while only 12% of the population of rural areas and villages do so.

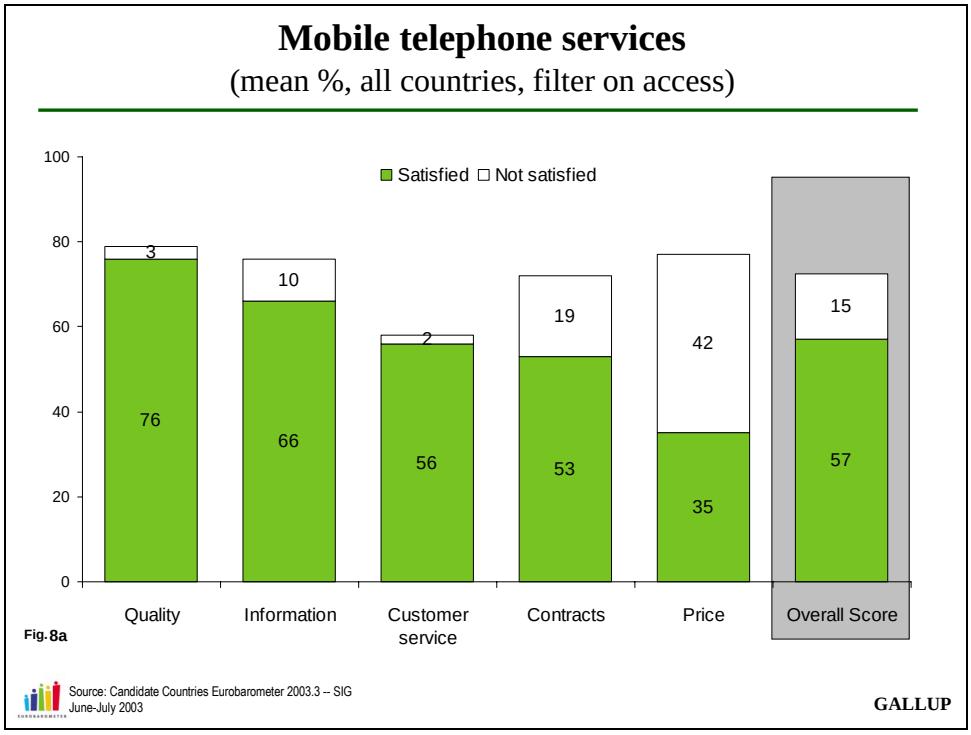


8. Overall analysis by sector

In this chapter we look at satisfaction and disatisfaction[6] with each of the following services: mobile phone, fixed phone, electricity supply, gas supply, water supply, postal, transport and rail. Sector by sector we will investigate each country's overall satisfaction[7].

Mobile telephone services

Seventy-six percent of the consumers interviewed expressed satisfaction with the quality of the mobile telephone service that they use. Meanwhile only 35% claimed satisfaction with the price they paid for this service, 42% expressed dissatisfaction regarding to this question.



[6] This chapter shows the percentages of "satisfaction" or "dissatisfaction". These are taken from a harmonised presentation of the results: see below, for questions Nos. 32, 33, 34, 35 and 37 in questionnaire CCEB 2003.3, the way in which the answers have been harmonised according to two types of answers ("satisfied" or "dissatisfied"):

Q32. a) In general, would you say that the **price** you pay for the X services you use is *fair* ("satisfied"), or *unfair* (+ voluntary *excessive*: "dissatisfied")?

Q33. a) Overall, what do you think of the **quality** of the X services that you use? Would you say that it is very good, fairly good, fairly bad or very bad (sum of the "very good" and "fairly good" results = "satisfied"; sum of the "fairly bad" and "very bad" results = "dissatisfied")?

Q34. a) In general, would you say that the **information** (bills, contracts, advertising, tickets, leaflets, etc.) you receive from your X service provider is *clear* ("satisfied"), or *unclear* ("dissatisfied")?

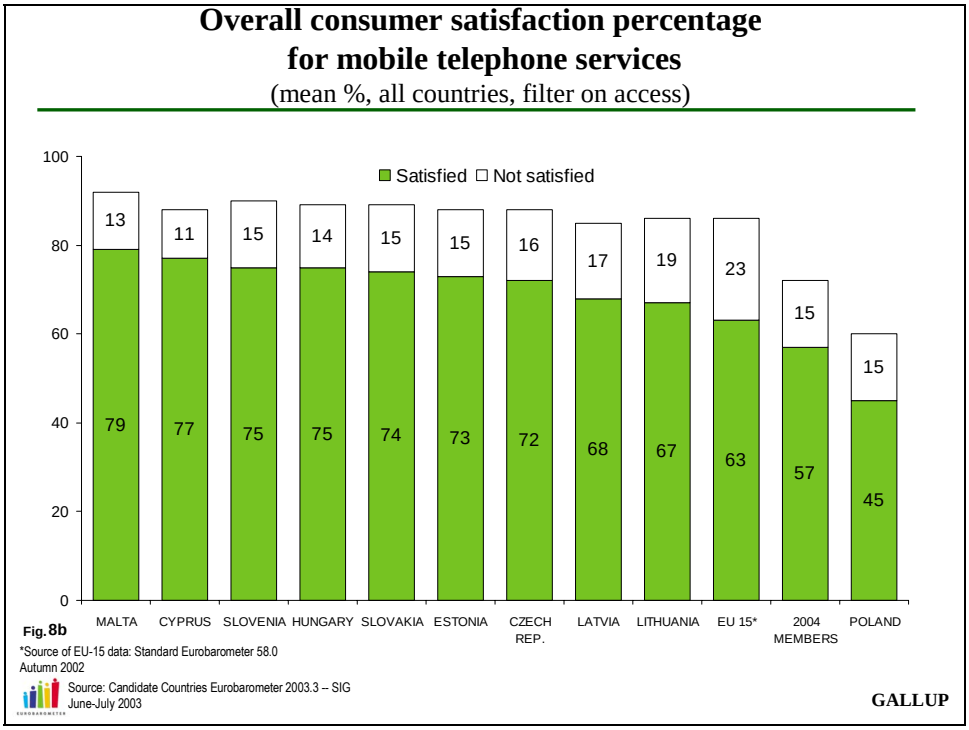
Q35. a) In general, would you say that the terms and conditions of your **contract** with your X service provider are *fair* ("satisfied"), or *unfair* ("dissatisfied")?

Q37. a) In general, would you say that the **customer service** you get from your X service provider is very good, fairly good, fairly bad or very bad (sum of the "very good" and "fairly good" results = "satisfied"; sum of the "fairly bad" and "very bad" results = "dissatisfied")?

[7] For this we will calculate the avegare % 'satisfied' and average % 'dissatisfied' responses for each of the attributes

Taking every aspect into account, the Maltese appear to be the most satisfied with mobile telephone services (79%). On the other side of the spectrum, only 45% of the Polish are satisfied with this service – a much lower percentage than in any other country included in this study.

Overall consumer satisfaction proves to be a bit higher in the current member states (63%) than in the acceding countries (57%). This difference is likely explained by the very low satisfaction found in Poland.



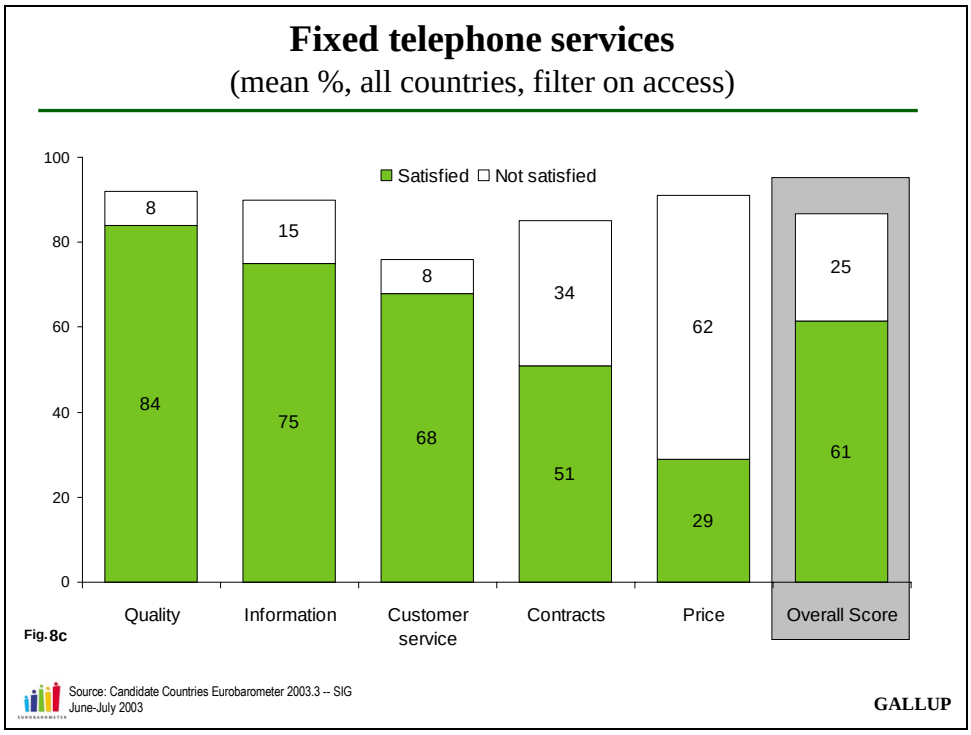
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each analyzed criterion of mobile telephone service:

Table 8a Overall satisfaction for mobile telephone services

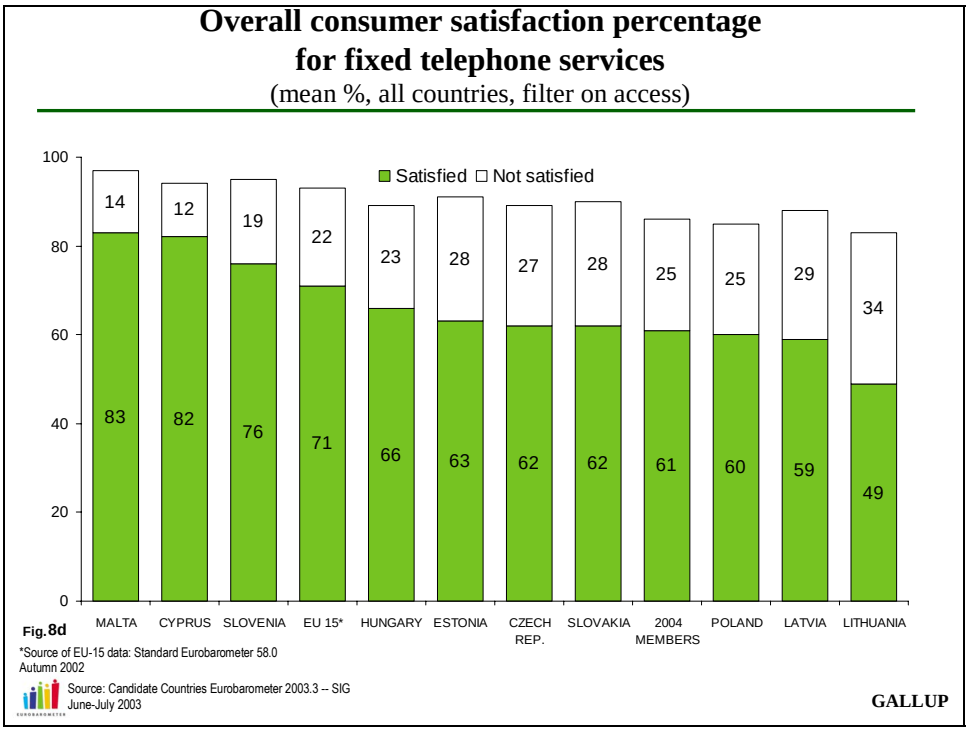
MOBILE TELEPHONE SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (63%)	HUNGARY (55%)	SLOVENIA (53%)
	not satisfied	LITHUANIA (53%)	CZECH REP. (48%)	SLOVAKIA (47%)
Quality	satisfied	CYPRUS (96%)	MALTA (96%)	CZECH REP. (93%)
	not satisfied	LATVIA (9%)	SLOVAKIA (5%)	SLOVENIA (5%)
Information	satisfied	ESTONIA (89%)	SLOVAKIA (88%)	CYPRUS (87%)
	not satisfied	LITHUANIA (14%)	CZECH REP. (13%)	SLOVENIA (10%)
Contract terms	satisfied	MALTA (86%)	HUNGARY (80%)	SLOVAKIA (80%)
	not satisfied	POLAND (22%)	LITHUANIA (21%)	ESTONIA (18%)
Customer service	satisfied	MALTA (73%)	CYPRUS (62%)	CZECH REP. (72%)
	not satisfied	SLOVENIA (6%)	SLOVAKIA (3%)	LITHUANIA (3%)

Fixed telephone services

Eighty-four percent of consumers are satisfied with the quality of fixed telephone services that they use. However, 62% are not satisfied with the price paid for this service.



Consumers from Malta (83%), Cyprus (82%) and Slovenia (76%) are the mostsatisfied with fixed telephone services. Consumers in Lithuania (34%), Latvia (29%), Estonia and Slovakia (both 28%), and the Czech Republic (27%), show the highest rates of dissatisfaction for this service.



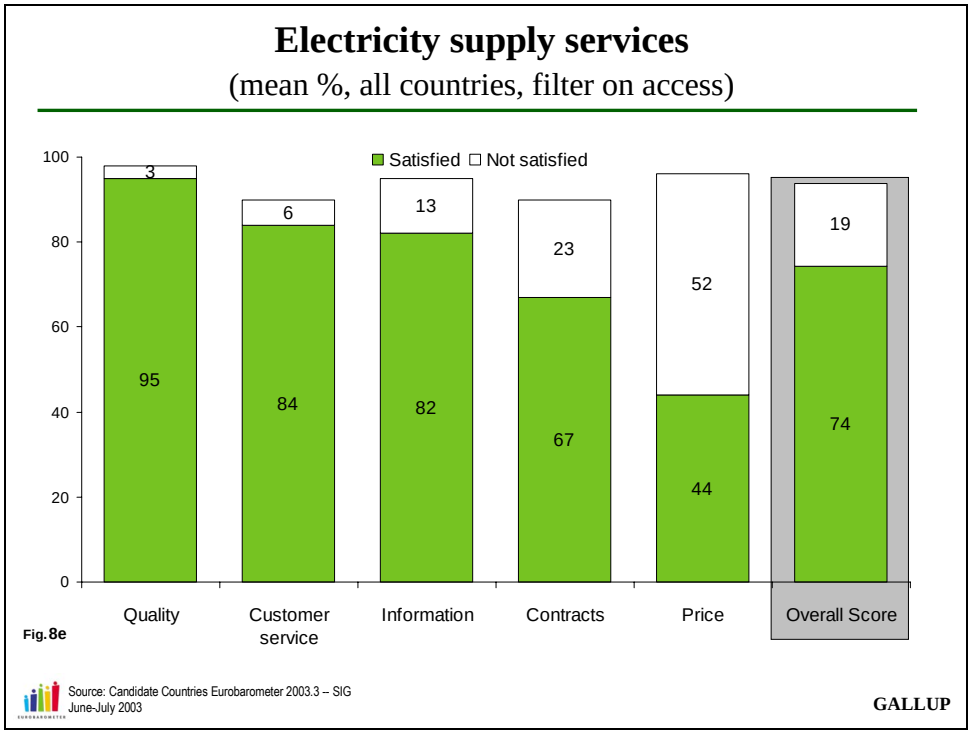
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of the analyzed criterion of fixed telephone service:

Table 8b Overall satisfaction for fixed telephone services

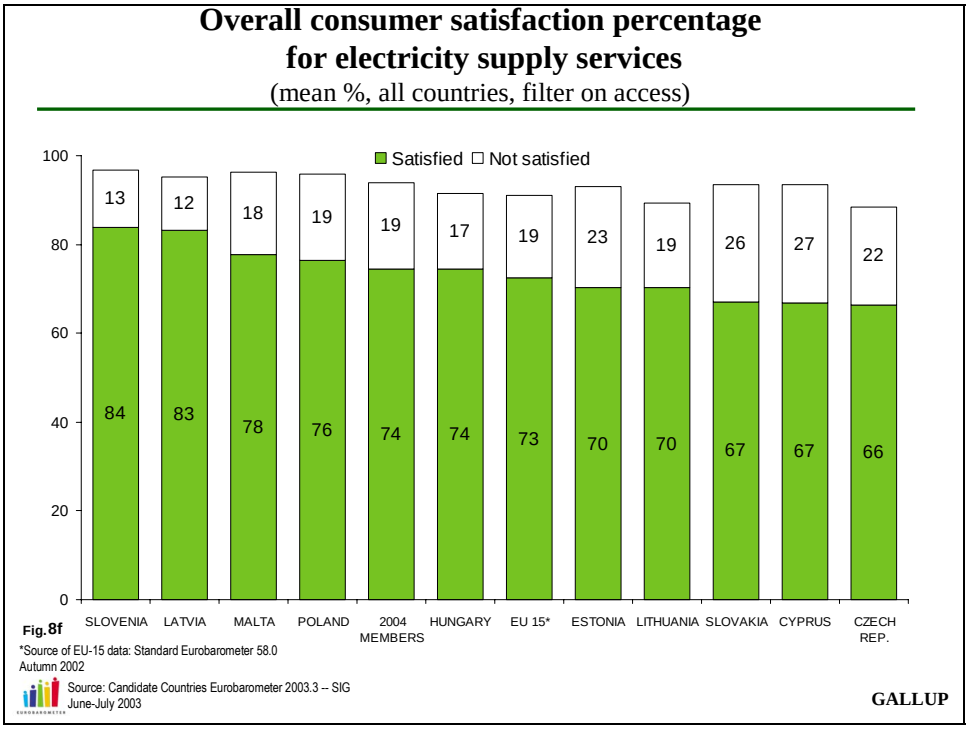
FIXED TELEPHONE SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (62%)	MALTA (60%)	SLOVENIA (46%)
	not satisfied	LITHUANIA (83%)	ESTONIA (74%)	SLOVAKIA (73%)
Quality	satisfied	CYPRUS (98%)	MALTA (97%)	SLOVENIA (93%)
	not satisfied	LATVIA (17%)	SLOVAKIA (14%)	CZECH REP. (10%)
Information	satisfied	SLOVENIA (88%)	LATVIA (86%)	CYPRUS (85%)
	not satisfied	LITHUANIA (25%)	CZECH REP. (16%)	POLAND (15%)
Contract terms	satisfied	MALTA (85%)	CYPRUS (75%)	SLOVENIA (72%)
	not satisfied	ESTONIA (42%)	LITHUANIA (42%)	LATVIA (38%)
Customer service	satisfied	CYPRUS (90%)	MALTA (88%)	SLOVENIA (81%)
	not satisfied	SLOVENIA (10%)	CZECH REP. (10%)	LATVIA (10%)

Electricity supply services

For electricity supply the "quality" criterion receives the highest rate of satisfaction (95%). Conversely, the price of electricity supply services generates the highest rate of dissatisfaction (52%).



Slovenians (84%) and the people of Latvia (83%) show the highest rates of satisfaction with electricity supply services. In comparison Cypriots, Slovakians, and Estonians show the highest rates of dissatisfaction – 27%, 26% and 23% respectively.



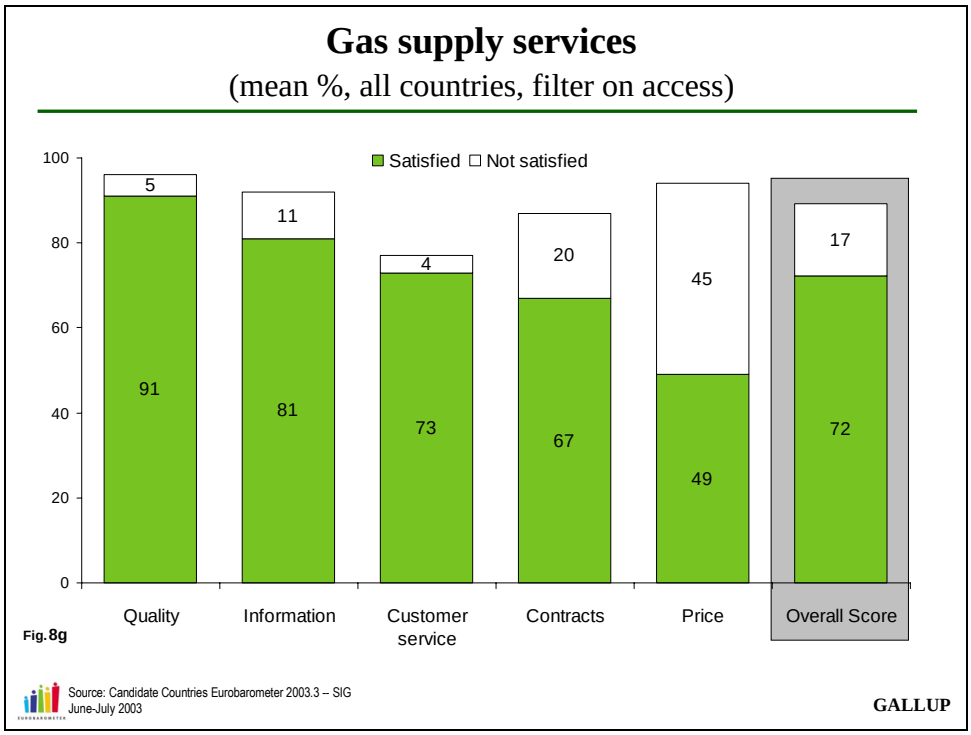
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of the analyzed criterion of electricity supply services:

Table 8c Overall satisfaction for electricity supply services

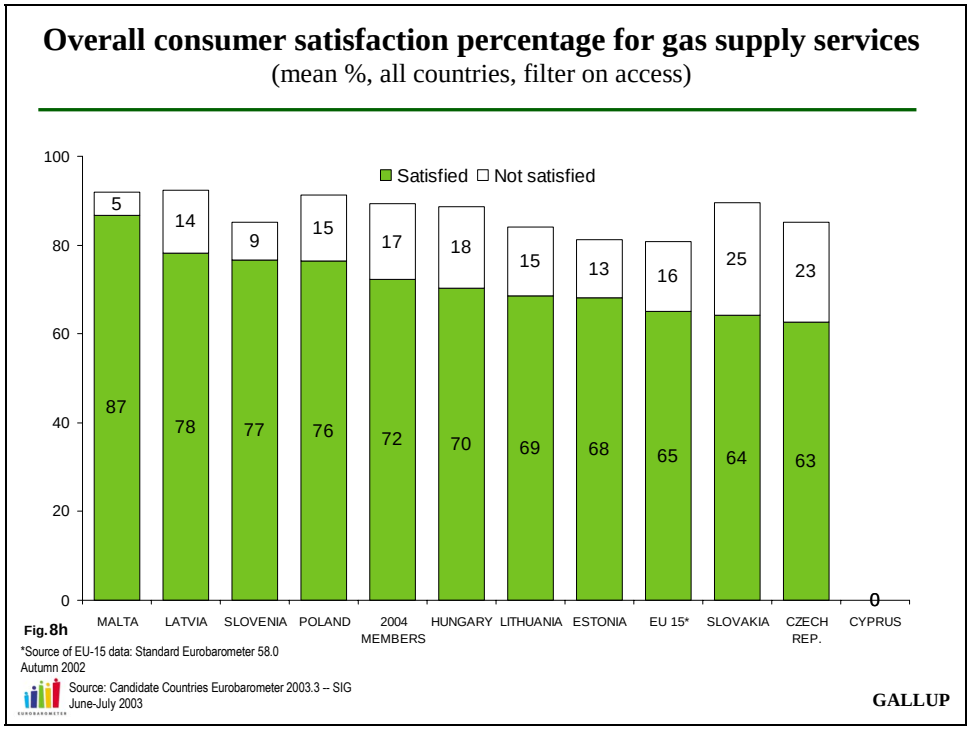
ELECTRICITY SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	LATVIA (63%)	SLOVENIA (59%)	HUNGARY (51%)
	not satisfied	SLOVAKIA (77%)	CYPRUS (69%)	ESTONIA (59%)
Quality	satisfied	SLOVENIA (97%)	HUNGARY (96%)	LATVIA (96%)
	not satisfied	ESTONIA (7%)	CYPRUS (6%)	SLOVAKIA (5%)
Information	satisfied	LATVIA (93%)	SLOVENIA (90%)	ESTONIA (84%)
	not satisfied	CYPRUS (31%)	MALTA (16%)	CZECH REP. (16%)
Contract terms	satisfied	SLOVENIA (83%)	MALTA (81%)	LATVIA (77%)
	not satisfied	ESTONIA (31%)	SLOVAKIA (28%)	POLAND (26%)
Customer service	satisfied	POLAND (90%)	SLOVENIA (90%)	LATVIA (87%)
	not satisfied	MALTA (10%)	CZECH REP. (8%)	SLOVAKIA (8%)

Gas supply services

91% of overall consumers say that they are satisfied with the quality of gas supply services. But almost every second consumer (45%) believes that the price paid for these services is unfair.



Consumers from Malta (87%) and Latvia (78%) are the most satisfied with gas supply services. The highest rates of dissatisfaction are found in Czech Republic (23%) and in Slovakia (25%).



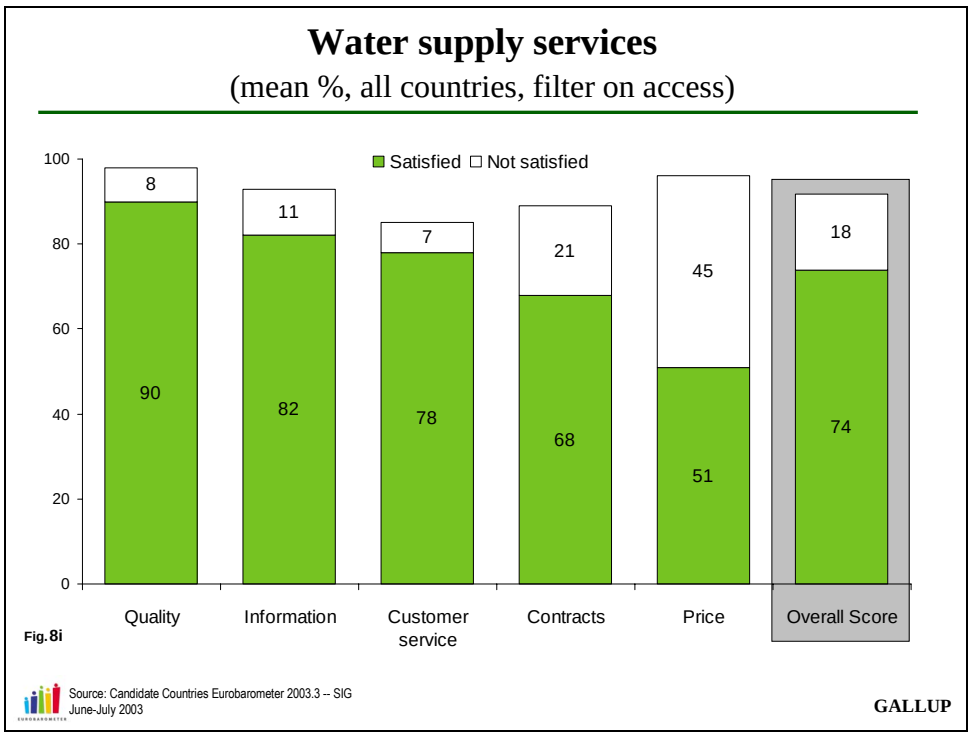
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of analyzed criterion of gas supply services:

Table 8d Overall satisfaction for gas supply services

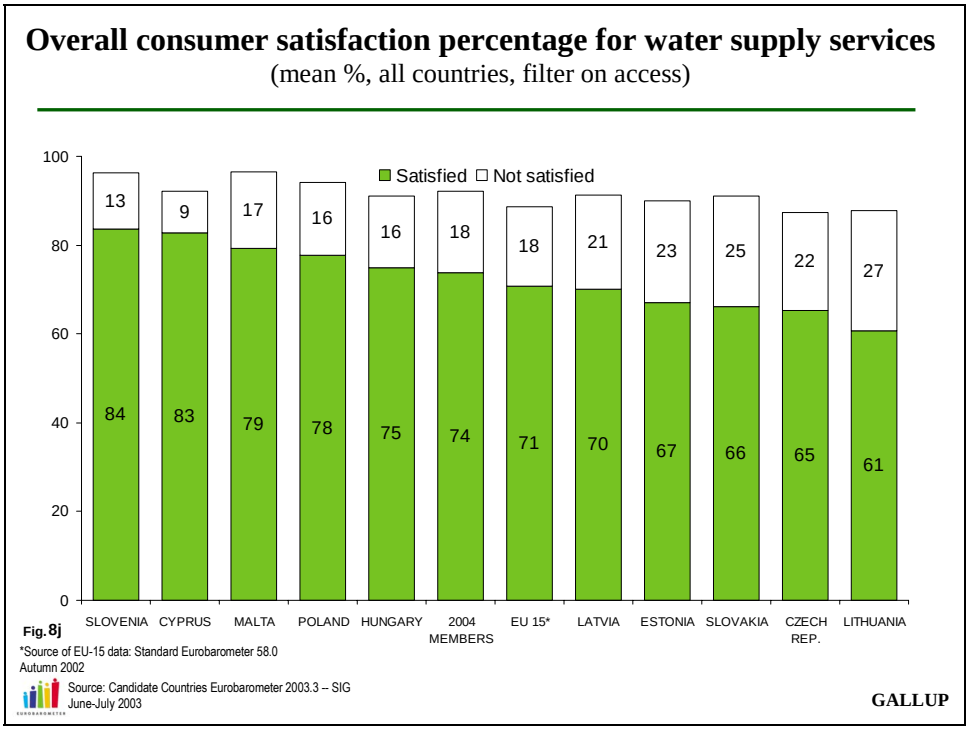
GAS SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (84%)	SLOVENIA (72%)	LATVIA (59%)
	not satisfied	SLOVAKIA (75%)	CZECH REP. (58%)	HUNGARY (50%)
Quality	satisfied	MALTA (96%)	LATVIA (95%)	SLOVAKIA (94%)
	not satisfied	HUNGARY (9%)	CZECH REP. (6%)	ESTONIA (5%)
Information	satisfied	LATVIA (89%)	ESTONIA (86%)	SLOVENIA (85%)
	not satisfied	CZECH REP. (17%)	SLOVAKIA (12%)	HUNGARY (12%)
Contract terms	satisfied	MALTA (85%)	SLOVENIA (82%)	HUNGARY (75%)
	not satisfied	SLOVAKIA (30%)	CZECH REP. (25%)	LATVIA (19%)
Customer service	satisfied	MALTA (88%)	POLAND (85%)	LATVIA (77%)
	not satisfied	CZECH REP. (7%)	LITHUANIA (6%)	SLOVAKIA (6%)

Water supply services

Nine consumers out of ten (90%) are satisfied with the quality of water supply services. But 45% of consumers consider the price paid to be unsatisfactory.



Consumers in Slovenia (84%), Cyprus (83%) and Malta (79%) show high rates of satisfaction water supply services. Lithuania is the only country to show a rate of satisfaction below 65% (with 27% claiming dissatisfaction). Overall dissatisfaction is also noticeable in Slovakia (25%), Estonia (23%), Czech Republic (22%) and in Latvia (21%).



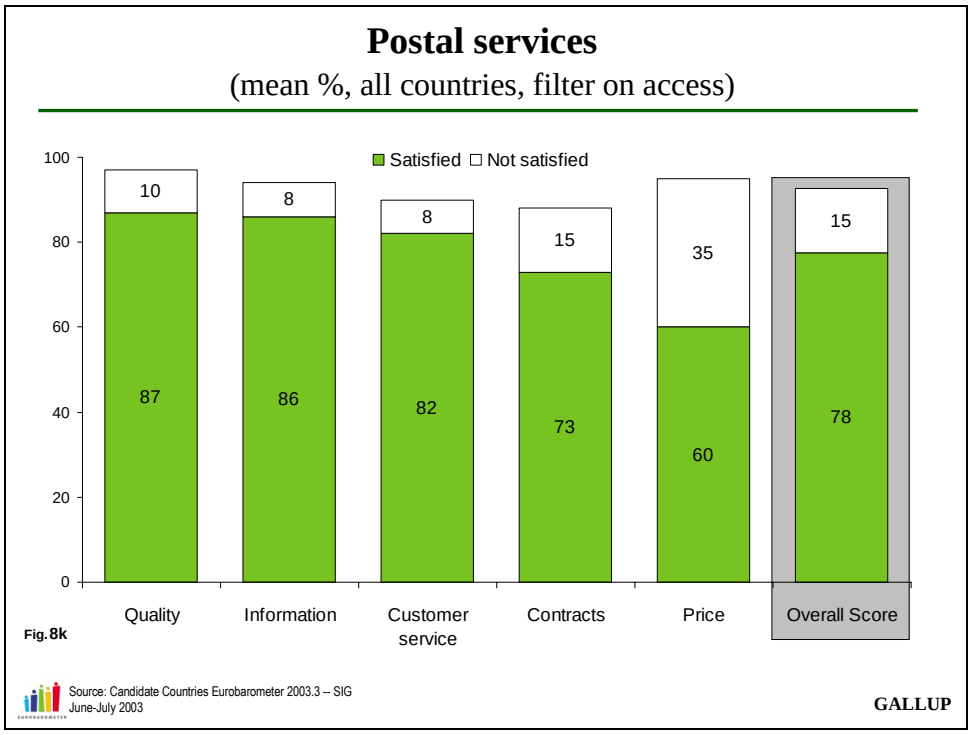
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of the analyzed criterion of water supply service:

Table 8e Overall satisfaction for water supply services

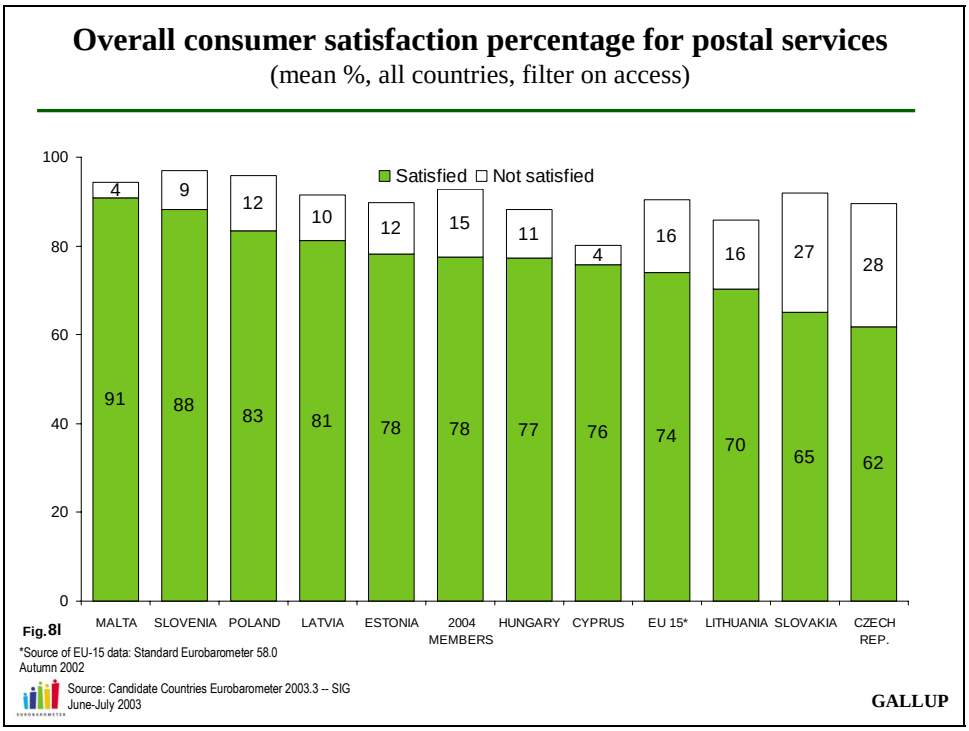
WATER SUPPLY SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	CYPRUS (75%)	SLOVENIA (70%)	LATVIA (56%)
	not satisfied	SLOVAKIA (67%)	LITHUANIA (66%)	CZECH REP. (53%)
Quality	satisfied	HUNGARY (95%)	CYPRUS (93%)	MALTA (92%)
	not satisfied	LATVIA (23%)	ESTONIA (19%)	LITHUANIA (18%)
Information	satisfied	SLOVENIA (88%)	LATVIA (86%)	HUNGARY (85%)
	not satisfied	CZECH REP. (16%)	LITHUANIA (16%)	SLOVAKIA (15%)
Contract terms	satisfied	SLOVENIA (83%)	MALTA (82%)	CYPRUS (76%)
	not satisfied	ESTONIA (27%)	SLOVAKIA (26%)	LATVIA (25%)
Customer service	satisfied	CYPRUS (89%)	MALTA (87%)	POLAND (87%)
	not satisfied	LITHUANIA (12%)	CZECH REP. (10%)	MALTA (9%)

Postal services

Nearly nine consumers out of ten (87%) acknowledged satisfaction with the quality of their postal service. The information provided satisfies 86% of consumers in the acceding countries, but at the same time more than one person out of three considers the price paid to be unfair (35%).



Malta (91%) and Slovenia (88%) show the highest rates of satisfaction with postal services, and only 4% and 9%, respectively, of claimed dissatisfaction. Slovakia and the Czech Republic, on the other hand, show rates of satisfaction at only 65% and 62%, and dissatisfaction as high as 27% and 28%.



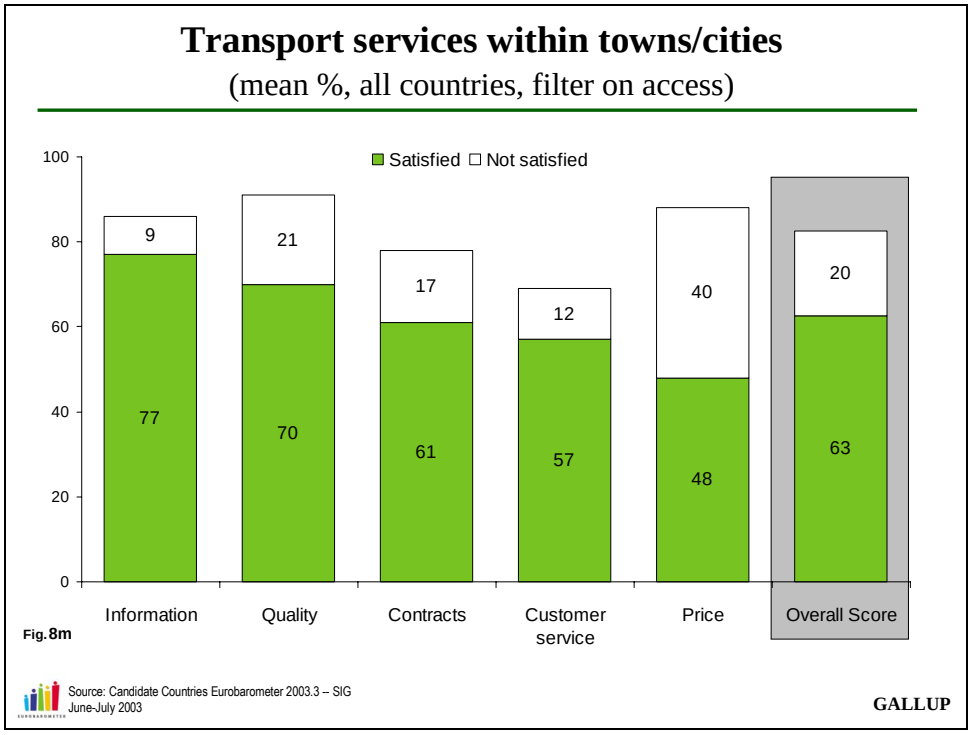
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of the analyzed criterion of postal service:

Table 8f Overall satisfaction for postal services

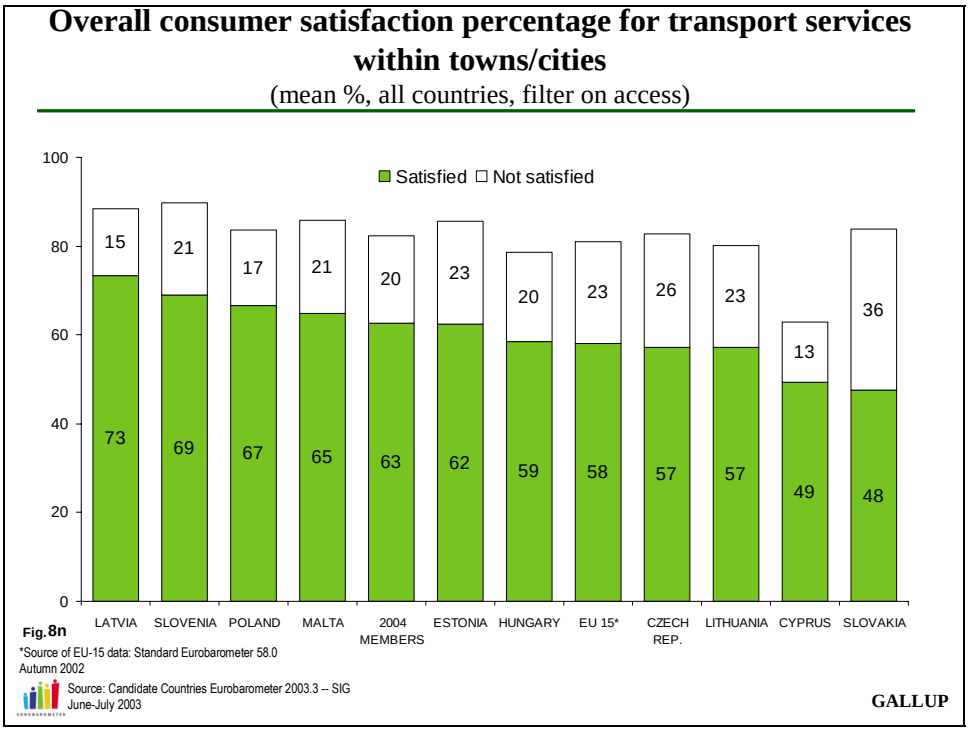
POSTAL SERVICES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (88%)	CYPRUS (76%)	SLOVENIA (74%)
	not satisfied	SLOVAKIA (62%)	CZECH REP. (57%)	LITHUANIA (42%)
Quality	satisfied	MALTA (97%)	SLOVENIA (96%)	POLAND (92%)
	not satisfied	CZECH REP. (25%)	SLOVAKIA (24%)	LITHUANIA (9%)
Information	satisfied	SLOVENIA (92%)	POLAND (90%)	ESTONIA (89%)
	not satisfied	CZECH REP. (12%)	SLOVAKIA (11%)	LITHUANIA (9%)
Contract terms	satisfied	MALTA (88%)	SLOVENIA (88%)	LATVIA (78%)
	not satisfied	CZECH REP. (24%)	SLOVAKIA (22%)	ESTONIA (15%)
Customer service	satisfied	MALTA (93%)	POLAND (91%)	SLOVENIA (91%)
	not satisfied	CZECH REP. (21%)	SLOVAKIA (16%)	SLOVENIA (7%)

Transport services within towns and cities

A full 77% of transport service consumers within towns/cities are satisfied with the information provided by the transport service within their locality, and 70% of these consumers are satisfied with the quality of these services. The price is perceived as fair by slightly less than one user out of two (48%), in comparison to 40% who find the price to be unfair.



Consumers from Latvia (73%), Slovenia (69%) and Poland (67%) are the most satisfied with transport services within towns/cities. Slovakia shows a 36% rate of dissatisfaction (as compared to an overall average of 20% for acceding countries).



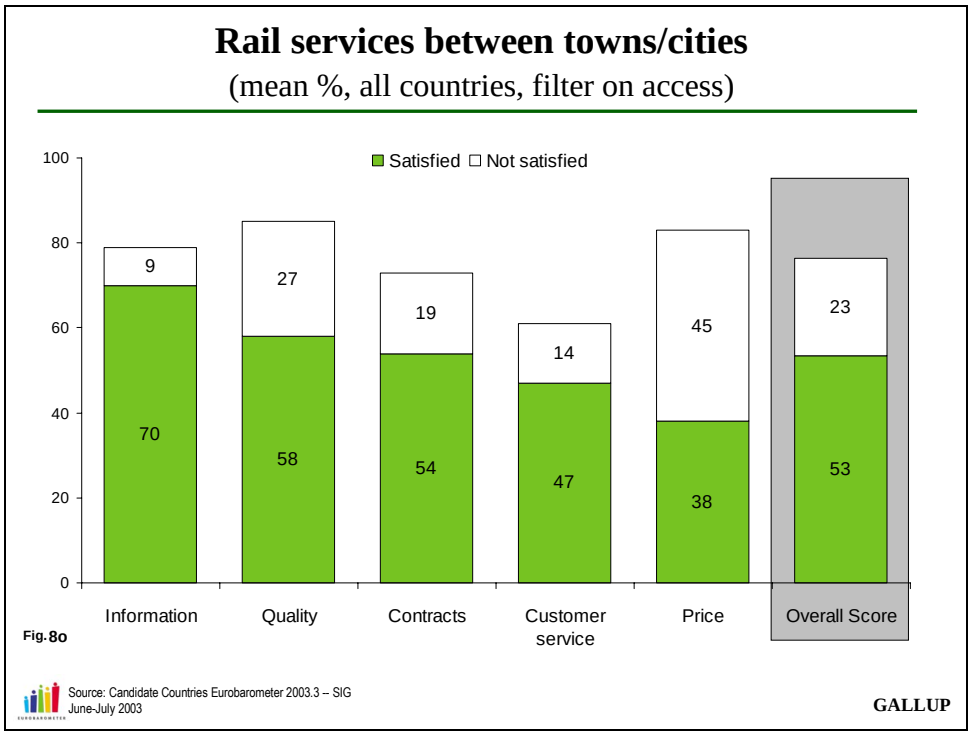
Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each analyzed criterion of transport service:

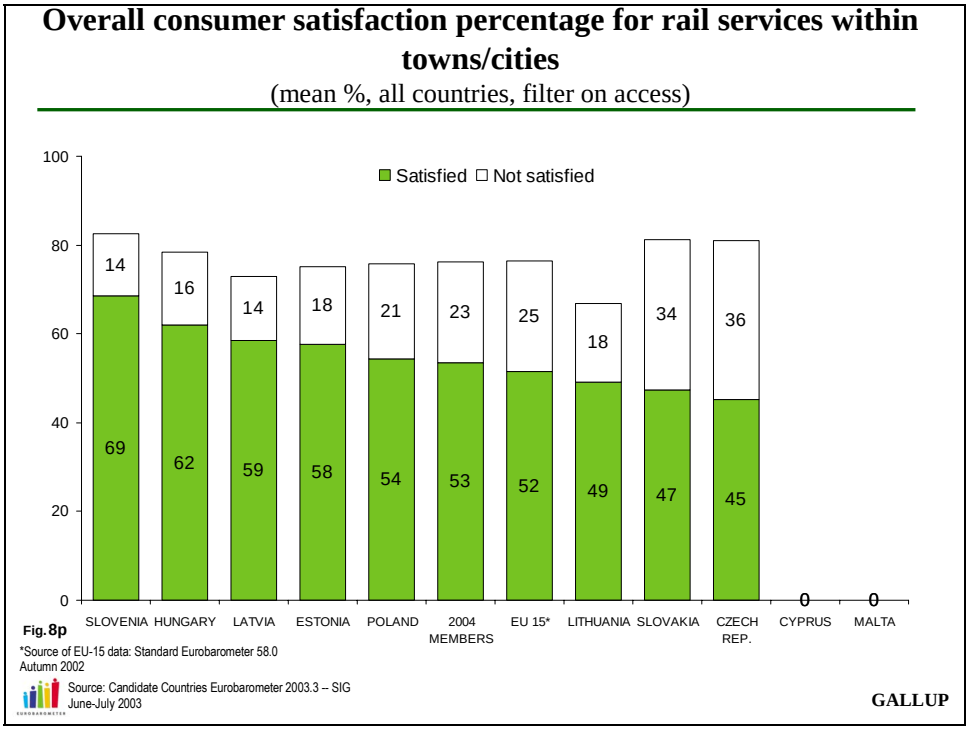
Table 8g Overall satisfaction for transport services within towns and cities

TRANSPORT SERVICES WITHIN TOWNS AND CITIES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	MALTA (76%)	LATVIA (61%)	HUNGARY (52%)
	not satisfied	SLOVAKIA (71%)	LITHUANIA (52%)	ESTONIA (51%)
Quality	satisfied	LATVIA (81%)	ESTONIA (74%)	POLAND (73%)
	not satisfied	SLOVAKIA (51%)	MALTA (32%)	HUNGARY (30%)
Information	satisfied	LATVIA (86%)	ESTONIA (82%)	SLOVENIA (82%)
	not satisfied	MALTA (15%)	LITHUANIA (13%)	SLOVAKIA (12%)
Contract terms	satisfied	SLOVENIA (75%)	LATVIA (70%)	MALTA (67%)
	not satisfied	SLOVAKIA (31%)	ESTONIA (26%)	CZECH REP. (20%)
Customer service	satisfied	LATVIA (69%)	SLOVENIA (69%)	POLAND (68%)
	not satisfied	MALTA (23%)	CZECH REP. (19%)	SLOVENIA (16%)

Rail services between towns and cities

Proportionally, the "price" criterion produces the greatest dissatisfaction (45%) with rail service. Although the information provided by rail services between towns/cities and the quality of these services satisfy around 70% of users, the overall average (based on five criteria) is hardly above the 50% mark with 53%.





The people of Slovenia show the highest rate of satisfaction, very slightly below 70%, for rail services between towns/cities. The Czech Republic and Slovakia are credited with a 36% and

34% rate of dissatisfaction respectively (compared to an overall 2004 member average of 23% for acceding countries).

Below you will find a chart displaying those countries with the highest percentages of satisfaction and dissatisfaction for each of the analyzed criterion of rail service service:

Table 8h Overall satisfaction for rail services within townsand cities

RAIL SERVICES WITHIN TOWNS AND CITIES		"Top 3" countries (in descending order)		
		1	2	3
Price	satisfied	SLOVENIA (62%)	HUNGARY (55%)	ESTONIA (47%)
	not satisfied	SLOVAKIA (70%)	CZECH REP. (67%)	LITHUANIA (45%)
Quality	satisfied	HUNGARY (72%)	SLOVENIA (70%	ESTONIA (68%)
	not satisfied	CZECH REP. (47%)	SLOVAKIA (46%)	HUNGARY (25%)
Information	satisfied	SLOVENIA (79%)	SLOVAKIA (77%)	ESTONIA (76%)
	not satisfied	CZECH REP. (13%)	SLOVAKIA (12%)	LITHUANIA (10%)
Contract terms	satisfied	SLOVENIA (74%)	HUNGARY (66%)	LATVIA (59%)
	not satisfied	SLOVAKIA (27%)	CZECH REP. (25%)	ESTONIA (19%)
Customer service	satisfied	SLOVENIA (58%)	POLAND (54%)	LATVIA (45%)
	not satisfied	CZECH REP. (27%)	POLAND (16%)	SLOVAKIA (14%)

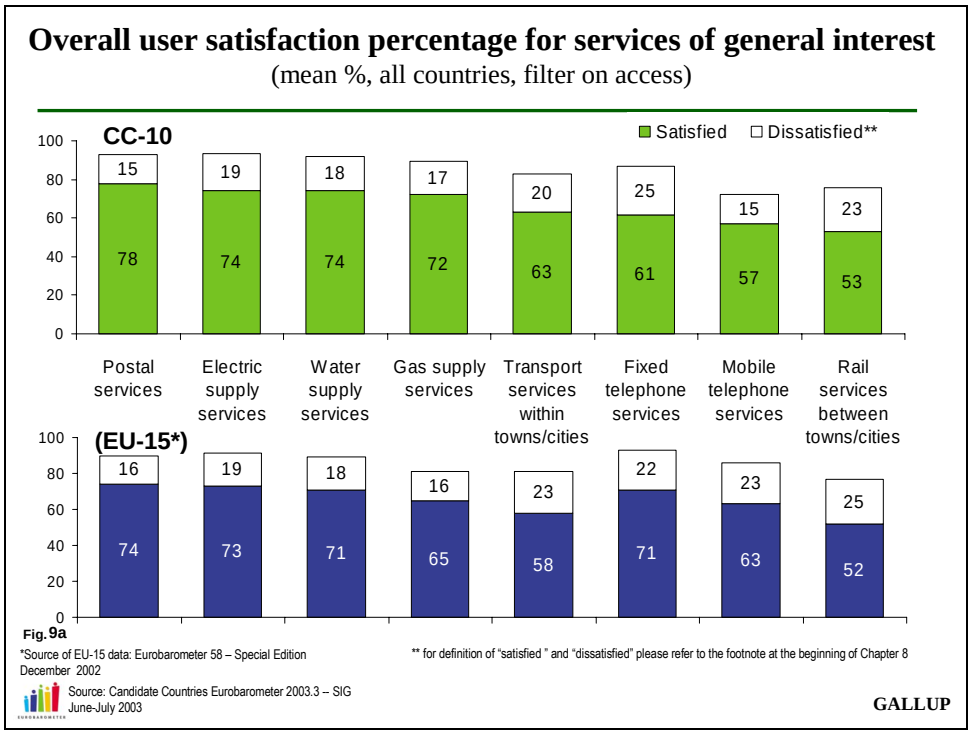
9. Conclusion

The degree of satisfaction with services of general interest among consumers in the acceding countries

Are consumers in the acceding countries satisfied with services of general interest to which they have access? Below you will find the average percentage of satisfaction across five criteria among each sector. The criteria include whether or not the price is fair, the quality of the service, the clarity of the information received, the fairness of the terms and conditions of the contracts applicable to services, and customer service.

Four services received rates of satisfaction of at least 70%: postal services (78% of consumers satisfied, compared to 15% dissatisfied), electricity supply services (74%, with 19% dissatisfied), water supply services (74%, and 18%), and finally gas supply services (72%, and 17%). Below the 70% satisfaction mark we find transport services (63%, with 20% dissatisfied), fixed telephone services (61%, and 25%) and, below 60% we find mobile telephone services (57%, and 15%) and the least satisfactory of all: rail services between towns/cities (53%, with 23% dissatisfaction).

As *FIGURE 9a* below shows, the global satisfaction levels are very similar in the two parts of Europe, with five services rated somewhat higher in the acceding countries (postal service, electricity supply service, water supply service, gas supply service and within-city public transportation), and three services considered globally in a better way in the EU-15: mobile and landline telephony, and inter-city rail service.



Consumers and the price of services of general interest

Considering the price paid for services, postal services generate the highest rate of satisfaction (60%), followed by water (51%), gas (49%) and transport services within the town or city (48%). For the remaining services considered, more respondents are dissatisfied than satisfied with the price paid. The rate of satisfaction with the price of electricity supply reaches 44%, leaving scarcely more than half (52%) of the consumers dissatisfied with the price they must pay. In the case of rail services between towns/cities the consumer's opinion on prices are also split: 38% of them are satisfied while 45% dissatisfied. We find almost the same ratios in the mobile telephone services where 35% of consumers are satisfied and 42% of are dissatisfied with the price that they pay. Fixed telephone services produced particularly worrying results: 62% of fixed telephone users are dissatisfied with the price of the service leaving only 29% claiming satisfaction with the price paid. This is the service that lags the most behind the EU-15 satisfaction levels as far as its prices are concerned — but generally, EU-15 consumers are more satisfied with the value they get for their money from the providers of services of general interest. Dissatisfaction regarding prices is more pronounced in the acceding countries than in the EU-15 countries, except for transport services and mobile telephone services.

Overall user satisfaction percentage regarding the price of services of general interest (mean %, all countries, filter on access)

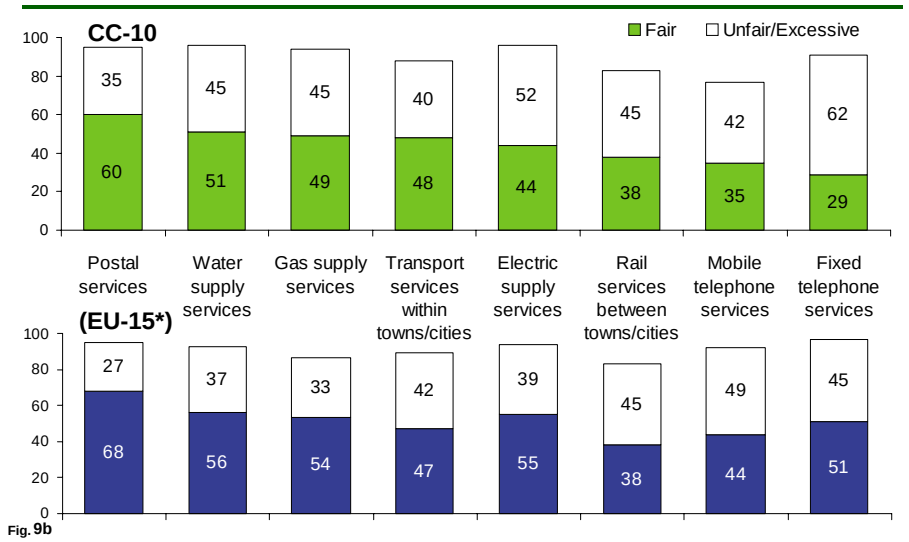


Fig. 9b

*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 -- SIG June-July 2003

GALLUP

Consumers and the quality of services of general interest

Electricity, gas, and water supply services are considered to be of satisfactory quality to the vast majority of consumers with at least nine out of ten rating them very or fairly good. Satisfaction is superior or equal to 70% for all the services, except for rail services between towns/cities with only 58%. In the sectors showing the greatest disapproval in terms of quality - transport services within towns/cities and rail services between towns/cities - 21% and 27% of consumers are dissatisfied, respectively.

Overall user satisfaction percentage regarding the quality of services of general interest (mean %, all countries, filter on access)

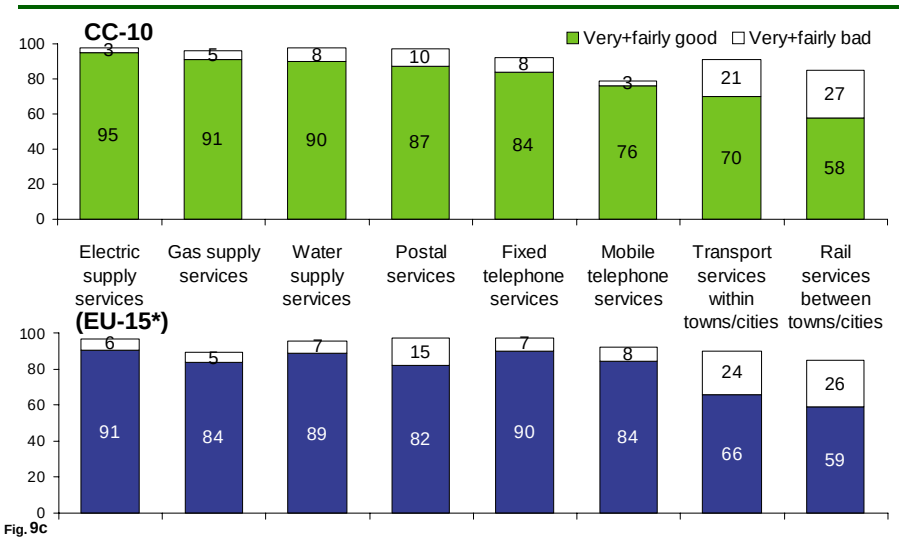


Fig. 9c

*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 -- SIG June-July 2003

GALLUP

Consumers and the information provided by services of general interest

The information received from postal services providers is deemed to be satisfactory by 86% of consumers. Similarly, 82% of consumers find information from electricity providers satisfactory, while 13% claim it to be unclear. The greatest level of dissatisfaction is found in the fixed telephone sector where approximately one out of seven consumers say that the information they receive from their service provider is unclear (still leaving the majority, 75% satisfied). Generally, consumers in the acceding countries are more satisfied with the information they receive from providers of services of general interest compared to their EU-15 peers, with the exception telephone services where opinions are similar or slightly less positive. Levels of dissatisfaction are also more important in the EU-15.

Overall user satisfaction percentage regarding the information received from services of general interest

(mean %, all countries, filter on access)

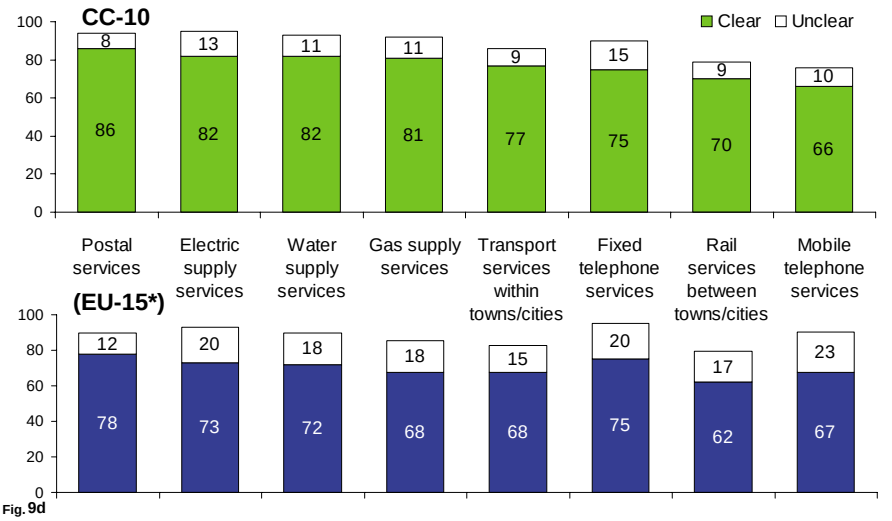


Fig. 9d

*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 – SIG June-July 2003

GALLUP

Consumers and contracts with services of general interest

Considering contracts with service providers, 73% of consumers are satisfied with postal services contracts, compared to 15% who are dissatisfied. At the other end of the spectrum, only 51% of consumers are satisfied with the contracts that they enter for fixed telephone services, as compared to one-third of consumers who disagree. Fixed telephone services elicit the highest rate of dissatisfaction in regard to contracts (34%) and this is the service where satisfaction in the acceding countries lags markedly behind of that in the EU-15 countries. For all the services, dissatisfaction levels are superior or equal to 15% of the consumers polled.

Overall user satisfaction percentage regarding the contracts entered into with services of general interest

(mean %, all countries, filter on access)

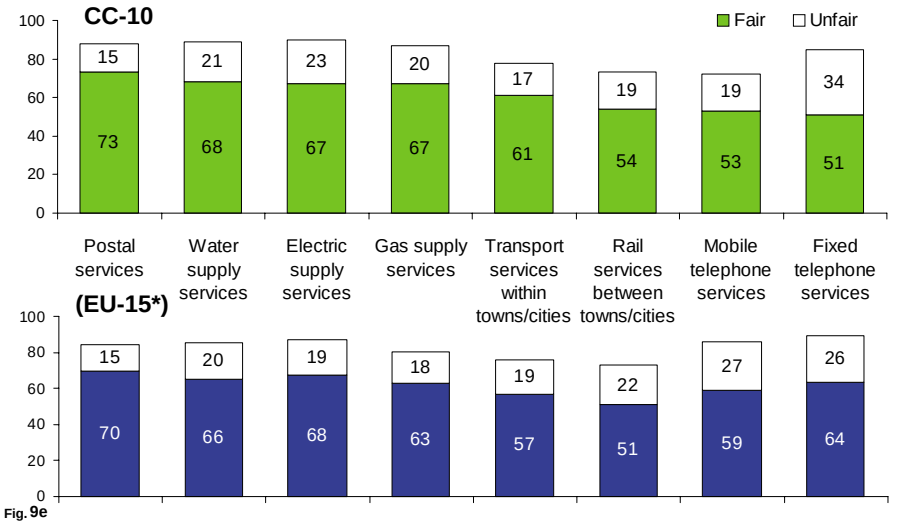


Fig. 9e

*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 -- SIG June-July 2003

GALLUP

Consumers and customer service

Considering customer service, electricity supply services generate the highest rate of satisfaction. A full 84% of consumers are satisfied with the customer service received in the electricity sector, while only 6% hold contrary opinions. Conversely, customer service for rail services between towns/cities receives the lowest rate of satisfaction (47%) and the highest rate of dissatisfaction (14%). The quality of customer service is evaluated in a better way in the EU-15 in the case of fixed and mobile telephone services, in the other services of general interest the consumers in the acceding countries are more likely to feel that the customer service they receive from their service providers is very or fairly good.

Overall satisfaction with customer service provided by services of general interest (mean %, all countries, filter on access)

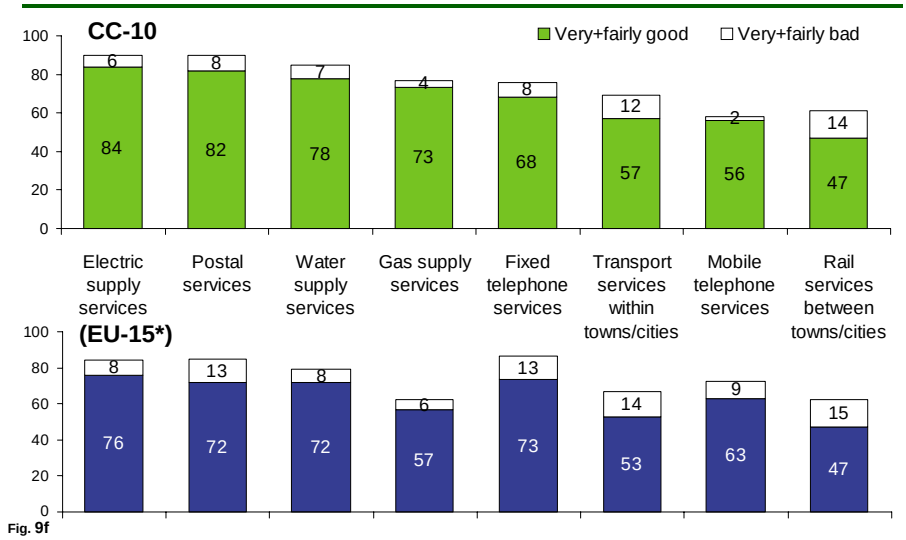


Fig. 9f

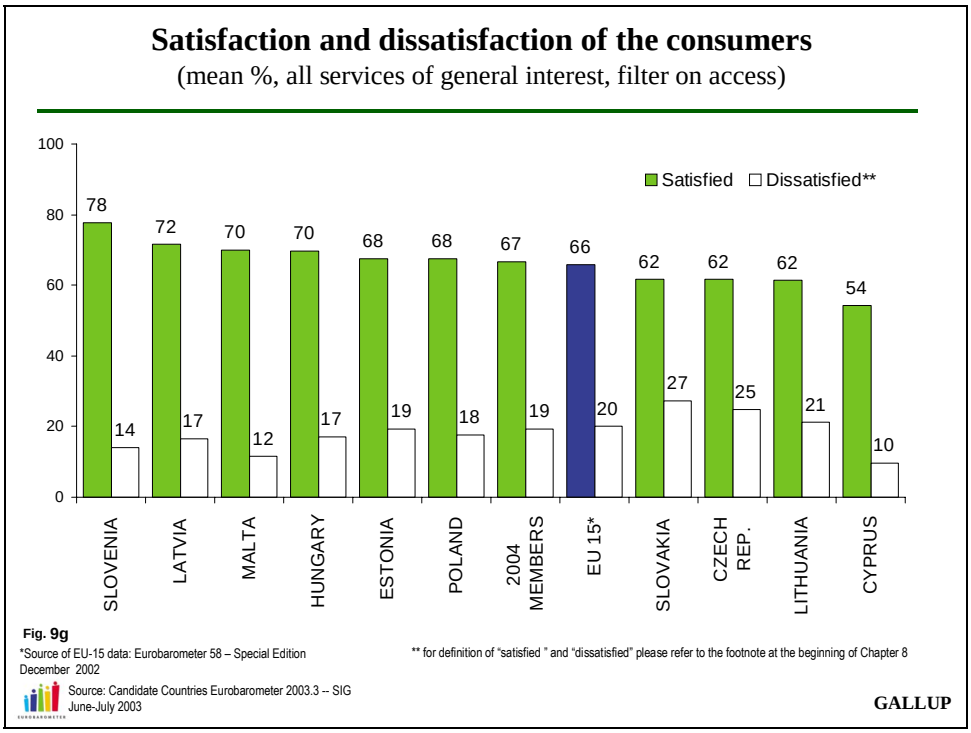
*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 -- SIG June-July 2003

GALLUP

The degree of general satisfaction / dissatisfaction among consumers

If we look at the average rate of satisfaction of the eight sectors we have considered among each of the acceding countries, consumers in Slovenia are slightly more satisfied than those in Latvia, Malta, and Hungary, whereas the Cypriots are the least satisfied with services of general interest. The greatest dissatisfaction is found in Slovakia and the Czech Republic with 27% and 25% of consumers claiming dissatisfaction, respectively.



The quality of services of general interest as opposed to information, pricing, or the other criteria considered here, generates the highest rate of satisfaction among consumers in the 2004 member states (81%). The clarity of information follows quality with second place (77%), third is customer service (68%), which is then followed by the terms and conditions applicable to contracts (62%). The price of the services of general interest elicits the lowest rate of satisfaction (44%) along with the highest rate of dissatisfaction (46%).

Degree of satisfaction with the service attributes of services of general interest (mean %, all countries, filter on access)

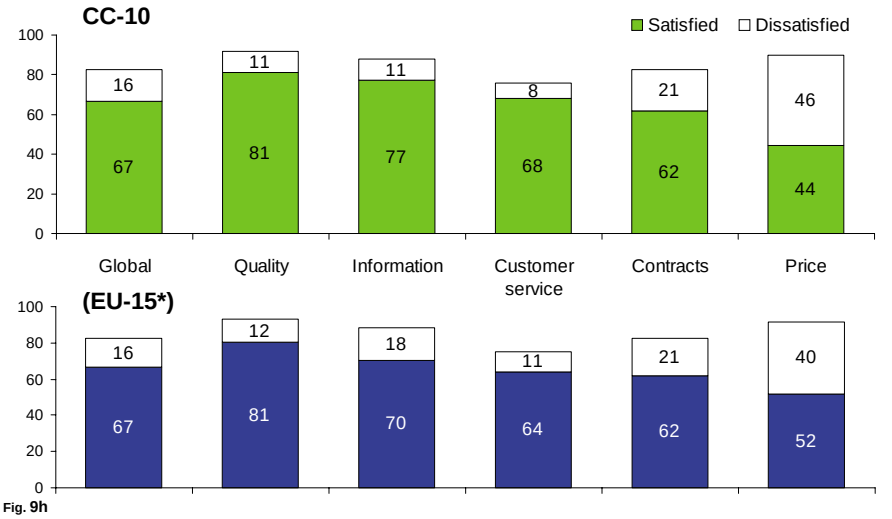


Fig. 9h

*Source of EU-15 data: Eurobarometer 58 – Special Edition December 2002

Source: Candidate Countries Eurobarometer 2003.3 -- SIG June-July 2003

GALLUP

Eurobarometer found the same pattern in the current member states as well, with little shifts: people in the EU are generally more satisfied with the price of services of general interest, and have a less favourable opinion about the information and the customer service they receive from their service providers.