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FOR INFORMATION

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TITLE: Telecommunication Sector in the Republic of Serbia



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TELECOMMUNICATION SECTOR IN THE REPUBLIC OF SERBIA

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Serbia Overview

- **Population: 7.498 million inhabitants** (excluding Kosovo and Metohija)
- **Total area: 88,361 km²**
- **GDP for year 2005: ca. €24,8 bn.**
- **Average monthly net salary in December 2005: ca. €353.**
- **Total income in telecommunication market in year 2005: ca. € 1,3 bn.** (40% more than 2005)
- **Share in GDP: 5,6% (4.5% in 2005)**



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Telecommunication market

	2005.		2006.		Proportional increase in the number of users (%)	Absolute increase in the number of users (thousands)
	Number of users (thousands)	Penetration (%)	Number of users (thousands)	Penetration (%)		
Fixed	2,527.3	33.7	2,719.4	36.3	7.6	192.1
Mobile	5,510.7	73.5	6,643.7	88.6	20.6	1,133
Internet	756.7	10	1,005	13.4	32.8	248.3
Cable	530.5	7	541.9	7.2	2.15	11.4
Broadband	40.5	0.54	121.6	1.62	200.2	81.1

Source: RATEL
on date 31.12.2006.

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Fixed telephone network




Indicator	
Number of main (fixed) lines connected to analogue exchanges	213,745
Number of main (fixed) lines connected to digital exchanges	2,505,657
Digitalisation rate of fixed network	88.63%
Percentage of party lines	11%
Waiting list for main lines	428,576
Revenue from fixed telephone service	430 million EUR

Source: RATEL
on date 31.12.2006.

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Mobile network

Indicator	Telekom Srbija 	Telenor 	Vip mobile* 
Mobile cellular subscribers: postpaid subscribers	226,368	461,262	-
Mobile cellular subscribers: prepaid subscribers	3,560,177	2,003,074	-
Mobile GPRS subscribers	142,435	2,562	-
Percent coverage of mobile cellular network (land area)	90,78%	75%	-
Revenue from GSM service	256 million EUR	325 million EUR	-

Source: RATEL
on date 31.12.2006.

*started with work
on Jun 2007.

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Cable TV

Indicator	
Number of Cable TV operators	68
Cable TV subscribers	541,856
Percentage of cable connections using coaxial cables	80%
Revenue from Cable TV service	24.1 million EUR
Estimated number of Cable TV subscribers in 2010	2 million

Source: RATEL
on date 31.12.2006.

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Internet

Indicator	
Number of Internet providers	153
Dial-up Internet subscribers	882,611
ADSL Internet subscribers	26,126
Wireless Internet subscribers	21,968
International Internet bandwidth	8,644 Mbps
Revenue from Internet services	27.4 million EUR

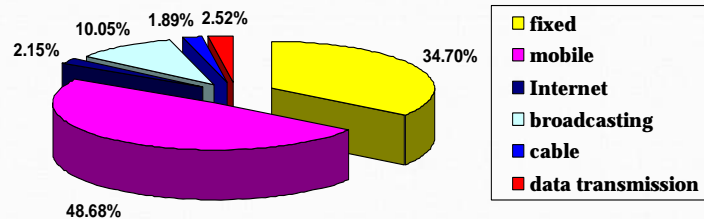
Source: RATEL
on date 31.12.2006.

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2006 Telecom Market Overview 1/2

Income distribution



Source: RATEL
on date 31.12.2006.

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2006 Telecom Market Overview

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Low use basket

	Average monthly bill*	Share of expenditure in monthly earnings
Fixed	907.32	4.18%
Mobile (prepaid)	488.63	2.25%
Television (RTS subscription)	300.00	1.38%
TOTAL	1695.95	7.81%

**on a monthly basis in
RSD, 1 EURO = 81RSD*

High use basket

	Average monthly bill*	Share of expenditure in monthly earnings
Fixed	907.32	4.18%
Mobile (prepaid)	488.63	2.25%
Television (RTS subscription)	300.00	1.38%
ADSL	1567.40	7.22%
Cable	404.73	1.86%
TOTAL	3668.76	16.90%

Source: RATEL
on date 31.12.2006.

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Thank you



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