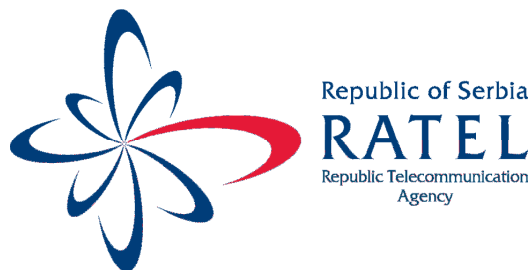


Telecommunication Services Roadmap

The rapid uptake of broadband has resulted in most operators offering, nowadays, bundled voice and data services, with certain discount rates in most cases.

However, there are recently trends in the marketplace of operators also offering TV packages as part of the overall service portfolio. The availability of high-speed internet connections allows the delivery of high-quality TV over broadband (IPTV). Operators are gearing up to formulate attractive multi-bundle packages, in an attempt to enhance end-users' experience.



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Availability of Multi-Play Service Offerings



Transition to Multi-Play Service Packages

Currently, there are specific drivers that allow us to consider new and innovative services that can be offered to end-users. On the one hand, we have the availability of Next Generation Networks (NGN), based on the Internet Protocol, that provide the opportunity for operators to offer simultaneously different high-speed and high-quality services. On the other hand, **end-users have become more sophisticated and are more demanding on the variety and quality of services received at their homes.** The widespread diffusion of broadband has resulted in end-users becoming more familiar with the benefits of using e-services, as a mean of improving their life.

In general, packages including voice, data and TV services (triple-play) are expected to dominate the market in the near future. The addition of TV over broadband (IPTV) enables end-users to record their favorite programs, rewind and forward programs, as required, and enjoy other interactive, session-based, services.

As competition intensifies, it is expected that a variety of similar packages, at low prices, will be market-ready, in the great benefit of end-users.

The Role of High Definition TV (HDTV)

In the context of combining traditional telecommunication services with TV offerings, there is an overall trend, on EU level, on migrating to High Definition Television (HDTV).



HDTV is up to four times more detailed than standard definition TV and it offers sharper and more realistic pictures. As well as having better pictures, HDTV programs often have high quality digital surround sound; this may enable an all-round better viewing experience.

End-users need to purchase compatible equipment, including an HD ready TV and HD compatible set top box, in order to receive HD television services. Consumer can possibly be able to view pre-recorded HD content on the latest generation of DVDs (Blu-Ray and HD-DVD) and games consoles.

In Serbia, Policy Makers efforts are focused on achieving transition to digital TV broadcasting by 2015. By that time, it is expected that the majority of citizens will be able to reap the benefits of HDTV and enjoy higher-quality television.

In parallel, transition to digital broadcasting will result in freeing-up of spectrum, currently occupied by analogue broadcasters, that can be further utilized for introducing new and innovative services.

Hints for End-Users When Selecting Service Packages

Overall, end-users should be cautious prior to signing their subscription contracts, under a multi-play service package. Since, most the services offered are not mature yet, end-users should request some warranties with regards to service geographic availability, pricing structure, installation process, customer support and quality of services. Some of the key considerations include:

- ♦ **Check service availability in your home-zone:** prior to signing any subscription contract, end-users must ensure that all services under the preferred package are readily available, or available within a reasonable timeframe, in the home-zone area.
- ♦ **Check special terms and conditions of the service contract:** end-users should read carefully all the terms and conditions of the service contract. Special focus should be given on pricing structure, discounts offered, installation procedure and timings and customer service and support.
- ♦ **Check quality of service (Qos) warranted:** end-users should be ensured that the quoted QoS indicators are met on an average basis and not on a “best-effort” one. This is most relevant for the high-speed broadband rates that are only available when specific conditions prevail.