

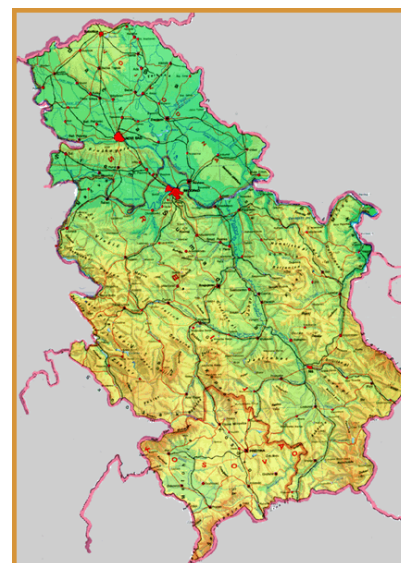
AN OVERVIEW OF TELECOM MARKET IN THE REPUBLIC OF SERBIA IN 2009

Dr Milan Janković, Executive Director

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General Overview

- **Population:** *7.498 million*
(without AP Kosovo and Metohija)
- **Area:** *88,361 km²*
- **GDP in 2009:** *around 30.85 billion euros*
(around 33.31 billion euros in 2008.)
- **Average net income in 2009:** *337 euros*
- **Revenues from telecom services in 2009:**
around 1.51 billion euros
(around 1.61 billion euros in 2008)
- **GDP share:** *4.76% in 2009.* (4.87% in 2008)





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Publications - An Overview of telecom market in the Republic of Serbia in 2005, 2006, 2007, 2008 and 2009



Fixed network

	2005	2006	2007	2008	2009
Number of users	2,527,300	2,719,400	2,854,550	3,084,872	3,105,700
Penetration (%)	33.70	36.30	38.00	41.14	41.42
Digitalization rate (%)	83.60	88.60	93.31	95.52	96.95
Revenues from telephone services (millions of euros)	370	426	414.10	413.00	360.05
Investments (millions of euros)	83.90	62.50	165.90	64.70	98.64

Source: RATEL (31 December 2009)

Mobile networks



	2005	2006	2007	2008	2009
Number of subscribers	5,510,690	6,643,700	8,452,642	9,618,767	9,912,339
Penetration (%)	73.50	88.60	112.73	128.27	132.20
Number of postpaid subscribers	705,734	938,036	1,689,193	/	2,609,526
Number of prepaid subscribers	4,804,956	5,563,251	6,763,449	/	7,302,813
Number of 3G network subscribers	/	/	257.379	750,026	862.935
Revenues (millions of euros)	400	581.50	839,60	980.45	826.74
Investments (millions of euros)	0.445	103.90	210.00	240.27	148.68

Source: RATEL (31 December 2009)

Radio and television program distribution service

	2005	2006	2007	2008	2009
Number of subscribers	530,500	541,900	694,600	922,300	1,080,900
Penetration (%)	7.00	7.20	9.32	12	14.42
Number of cable operators	/	58	72	74	78
Revenues from radio and TV program distribution services (millions of euros)	21.40	22.70	20.30	60.70	72.37
Coaxial networks (%)	/	80.00	10.60	5.89	3.5
HFC network (%)	/	/	75.60	77.54	70.92

Source: RATEL (31 December 2009)

Internet (1)

	2005	2006	2007	2008	2009
Number of subscribers	758,680	1,005,200	1,268,506	1,619,711	1,705,716
Penetration (%)	10.12	13.28	16.92	21.60	22.75
Number of Internet service providers	66	150	159	197	199
Revenues for Internet services (millions of euros)	19.30	26.60	59.30	107.58	117.56

Source: RATEL (31 December 2009)

Internet (2)

Number of users according to access technology	2005	2006	2007	2008	2009
Dial-up	708,226	882,611	685,397	397,202	252,195
ADSL	9,530	26,126	132,359	267,876	351,252
Cable modem	23,956	54,598	87,731	138,850	187,923
Wireless access	1,049	21,968	36,059	47,753	45,864
Mobile (3G) broadband access	/	/	/	25,489	100,628
Total number of 3G network subscribers	/	9,687	257,379	738,401	762,307
Other (ISDN, direct access, Ethernet, LAN, etc.)	13,914	10,210	2,276	1,135	5,547

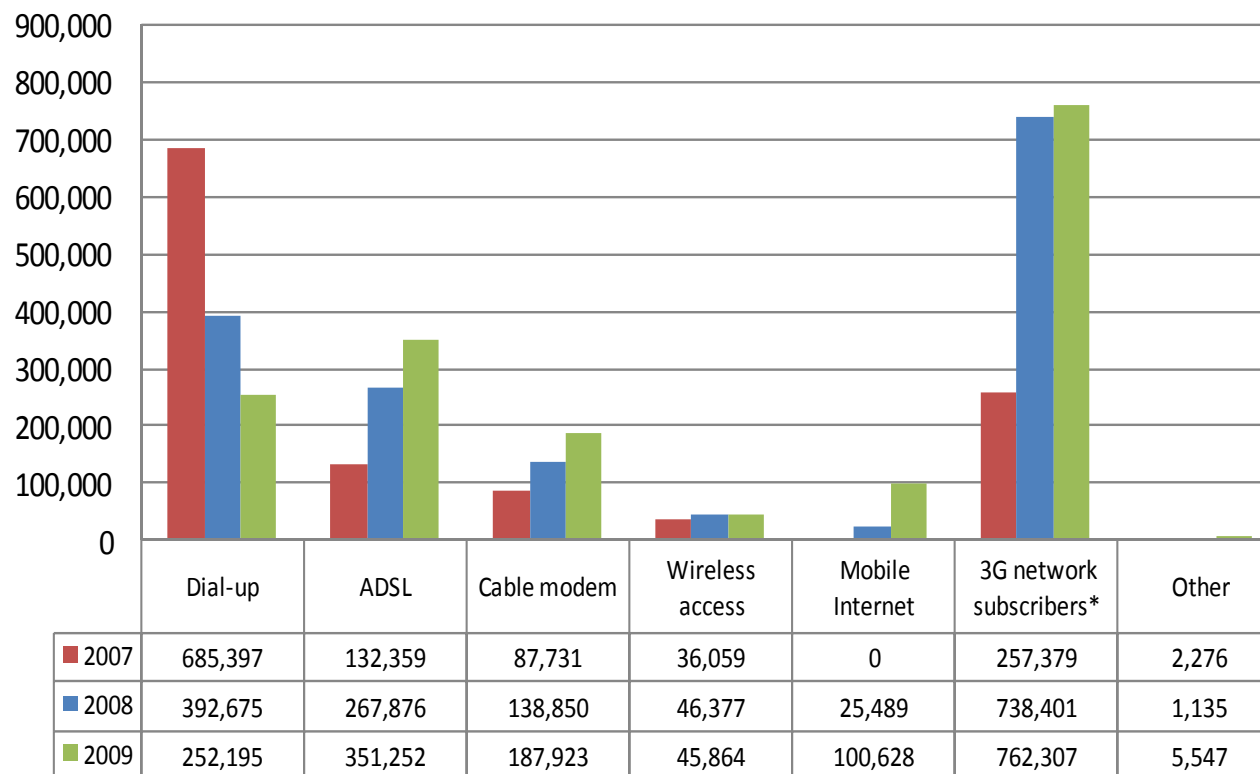
Availability of broadband services	2005	2006	2007	2008	2009
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Mobile (3G) broadband access	/	/	/	25,489	100,628
Total number of 3G network subscribers	/	/	257,379	738,401	762,307
Total number of broadband service subscribers	40,500	121,600	583,109	1,219,504	1,453,521
Penetration (%)	0.54	1.62	7.78	16.24	19.39

Source: RATEL (31 December 2009)

Belgrade, 24.6.2010.



Number of Internet users according to Access Technology

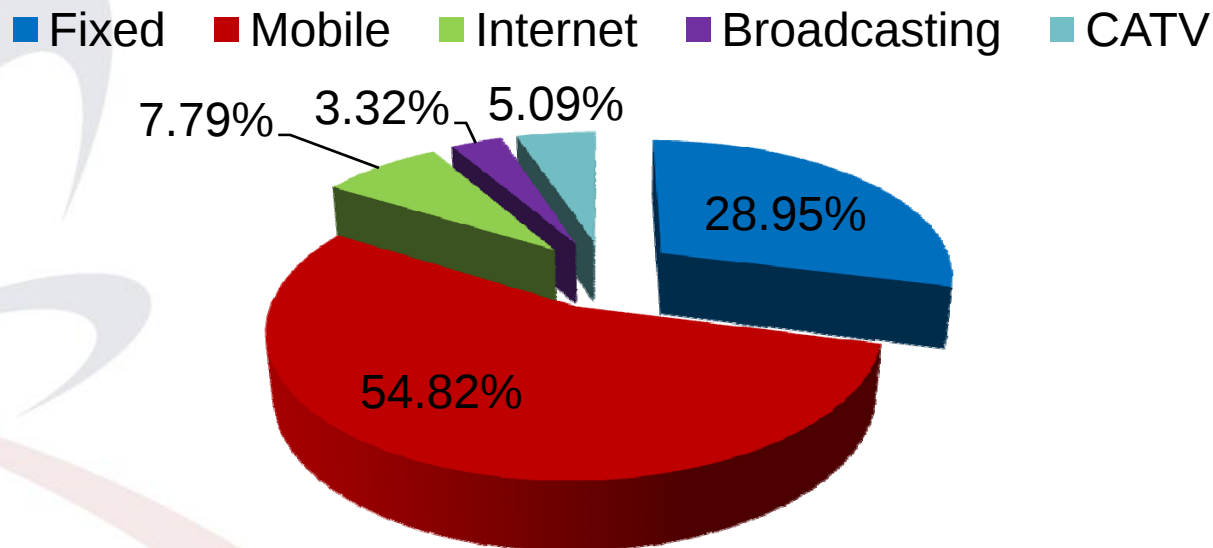


2009 Market Overview

ALLOCATION OF REVENUES

Total revenues amount to approximately 1.51 billion euros

Allocation of revenues

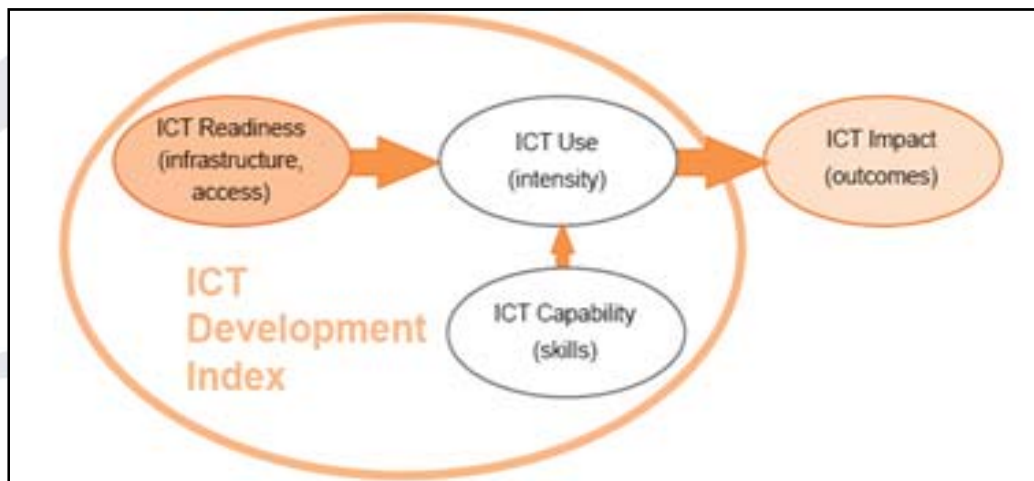


Source: RATEL (31 December 2009)

ICT Development Index (IDI)

11 indicators divided into three sub-groups:

- ICT infrastructure and access,
- ICT use (primarily by individuals, but also households and undertakings) and the intensity of use,
- ICT skills (or human capacity necessary for the effective use of ICTs).



	IDI index value for Serbia	Rank(list of 159 countries)
2008.	4.23	53
2009.	4.80	Among first 50

Thank you

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