



Republic of Serbia

RATEL

Republic
Telecommunication
Agency



MARKET ANALYSIS PROCEDURES - RATEL's EXPERIENCES -

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Facts about RATEL

- **The Republic Telecommunication Agency (RATEL) is an independent regulatory body defined under the Telecommunications Law in 2003.**
- **The Law provided the conditions for creating an **OPEN MARKET**, as a result of:**
 - **introduction of liberalization of the monopolized sector,**
 - **proposed measures of harmonization with the EU regulations,**
 - **free access to telecom networks and facilities,**
 - **introduction of equal competition.**



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Facts about RATEL ... **mission**

- **RATEL's principal task is to provide conditions for further development of the telecom sector and satisfy public interests through:**
 - **regulation by applying cost-based market economy,**
 - **introduction of new operators,**
 - **introduction of new services,**
 - **enhancement of the quality of existing services.**



Serbia Overview

- **Population: 7.498 million inhabitants** (excluding Kosovo and Metohija)
- **Total area: 88,361 km²**
- **GDP for year 2006: ca. €16.116 bn.**
- **Average monthly gross salary in December 2006: ca. €274.77 net**
€401.84 gross
- **Total income from telecommunication services in 2006: ca. € 1.3 billion** (40% more than 2005)
- **Share in GDP: 5.6%** (4.5% in 2005)





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Comparative analysis 2005/2006

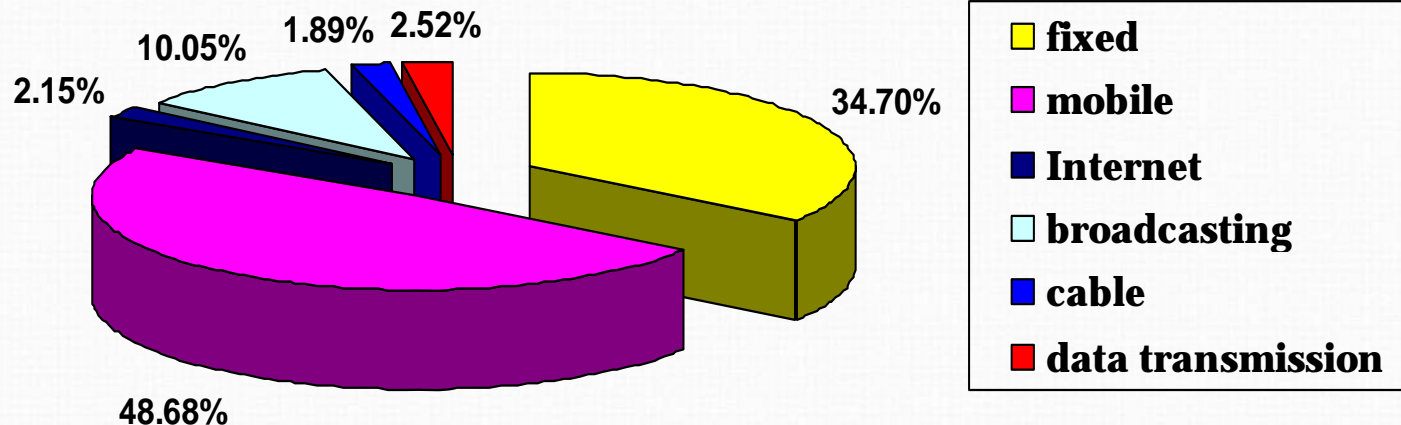
	2005.		2006.		Proportional increase in the number of users (%)	Absolute increase in the number of users (thousands)
	Number of users (thousands)	Penetration (%)	Number of users (thousands)	Penetration (%)		
Fixed	2,527.3	33.7	2,719.4	36.3	7.6	192.1
Mobile	5,510.7	73.5	6,643.7	88.6	20.6	1,133
Internet	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.



2006 Telecom Market Overview

Income distribution



Source: RATEL
on 31.12.2006



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Responsibilities of the Agency

Under Article 9 of TL,

- **create and maintain a database which contains all significant information from the telecommunications sector and regularly publish that information;**
- **monitor developments in the field of telecommunications, gather information from telecommunications operators, and provide information to users, operators and international organizations;**
- **make its work transparent, including the possibility for all interested parties to give their remarks and comments regarding measures taken and decisions made.**



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Agency Reports

Under Article 20 of TL,

the Agency shall prepare and submit to the Government and the National Assembly an annual report (including financial statements) on its activities, and in particular:

- **report on the development of telecommunications in the Republic of Serbia;**
- **report on the implementation of tariff policy principles pertaining to regulated services;**
- **report on the progress in realization of universal service, including an assessment of the degree to which users' needs have been satisfied; and**
- **report on the allocation and assignment of radio frequencies for civilian use.**



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Collecting Required Information

Under Article 21 of TL,

At the request of the Agency, public telecommunications operators shall provide all data and information, including financial data and information, which are necessary for the performance of activities from within the responsibility of the Agency.



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Register Keeping

Under Article 21 of TL,

the Agency shall create and maintain a database of its registers, which are public documents.

The Agency shall keep the registers of:

- **licenses granted to telecommunications operators;**
- **licenses granted for radio stations;**
- **technical licenses; and**
- **concluded interconnection agreements**



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Relevant definitions

- ***significant market power*** means that the share of a public telecommunications operator in the telecommunications market of the Republic of Serbia, measured by the number of users of a certain services provided by the public telecommunications operator within the scope of his activity, not below a prescribed percentage
- ***prescribed percentage*** means the share at least 20% in the telecommunications market in the Republic of Serbia, unless the Republic Telecommunications Agency determines otherwise for a certain type of service. The Republic Telecommunications Agency may deviate by up to 25% from the percentage prescribed herein



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SMP operators

RATEL adopted decisions on declaring:

- ***Telekom Srbija*** as SMP for public fixed telephony services
- ***SBB*** as SMP for cable distribution service provision



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Publications

RATEL has published:

- *An Overview of the Telecom Market in the Republic of Serbia in 2005*

and

- *An Overview of the Telecom Market in the Republic of Serbia in 2006*

applying ITU definitions of indicators



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Thank you

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