

# Russian Cellular Market Watch

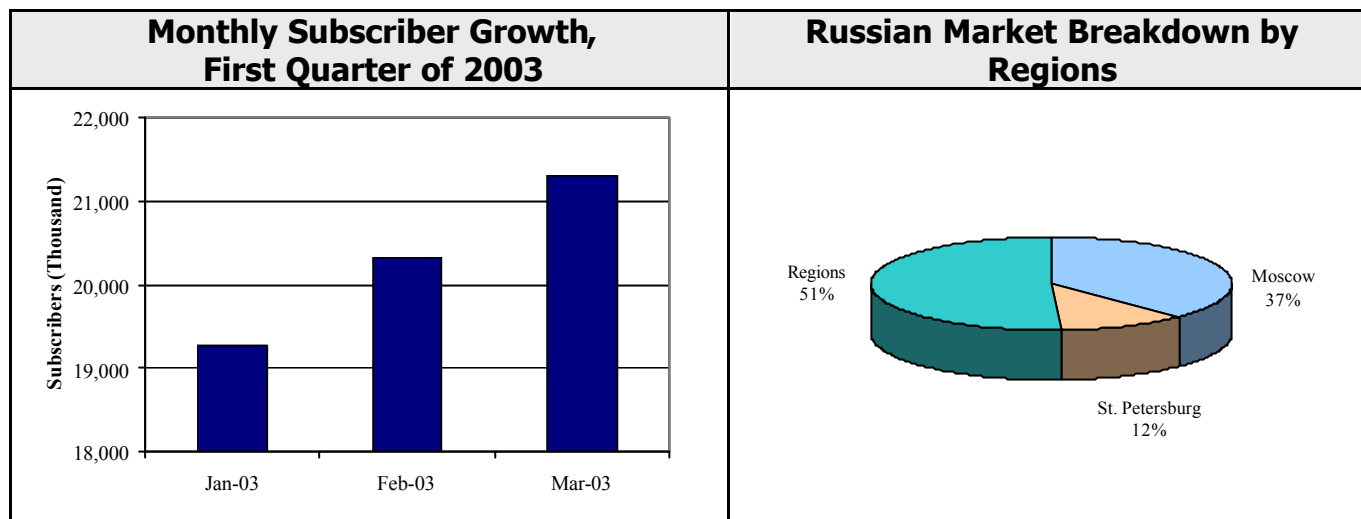
## March 2003



J'son & Partners  
Market Watch



**Statistics:** In March, the number of cellular subscribers in Russia (GSM, TDMA/DAMPS, NMT, IS-95, IMT-MC-450) reached more than **21.3 million**. The share of the regions, including St. Petersburg and Leningrad Oblast, continues to grow – now 63%.



Sources: J'son & Partners; Sotovik

**Additions:** In March, subscriber growth was 5%<sup>1</sup>. The overall penetration in Russia reached 14.8% of the population. VimpelCom demonstrated the highest subscriber growth in the regions. MTS is a leader in additions in the Moscow License Area. The significant growth of MTS' subscribers in the MLA is due not only to the pre-paid JEANS offering, but also to mass connections to the new tariff group, Optima.

### Top 10 Cellular Operators:

Operator	Total Subs as of March 31	YTD Growth (%)	Moscow Subs as of March 31
1. MTS	7,580,000	15%	3,540,000
2. VimpelCom	6,162,000	20%	3,930,000
3. MegaFon	3,638,000	23%	388,000
4. SMARTS Group	670,000	24%	n/a
5. Uralsvyazinform*	551,400	19%	n/a
6. TAIF-Telcom	332,246	24%	n/a
7. N. Novgorod Cellular	201,630	17%	n/a
8. Tomsk Cellular Communications**	123,635	22%	n/a
9. Tatincom	122,864	5%	n/a
10. Yekaterinburg-2000	114,700	44%	n/a

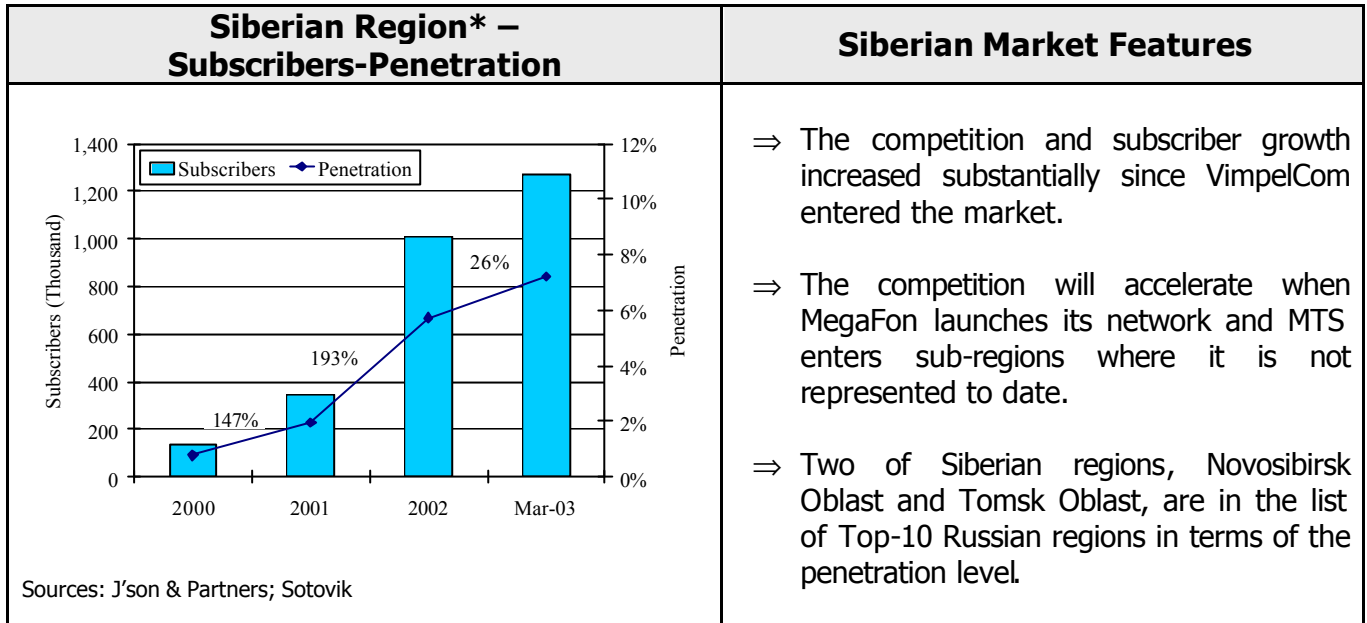
Sources: J'son & Partners; Sotovik

\* consolidated all regions and standards

\*\* has moved from the 9<sup>th</sup> to 8<sup>th</sup> place

<sup>1</sup> Based on the adjusted subscriber base as of February 28, 2003.

**Regional Snapshot: Siberian Region** with its current population of 17.6 million witnessed significant growth in 2002. The overall penetration in the region rose from 2% in 2001 to 5.7% in 2002. By the end of March 2003, the penetration level reached 7.2%.



\* The Siberian Region: Aginskiy Buryatskiy AO, Altay Kray, Altay Rep., Evenkiyskiy AO, Kemerovo Oblast, Khakassiya Rep., Krasnoyarskiy Kray, Novosibirsk Oblast, Omsk Oblast, Taymyr AO, Tomsk Oblast, Tyva Rep.

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