



Republic of Serbia  
**RATEL**  
Regulatory Agency for  
Electronic Communications  
and Postal Services

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

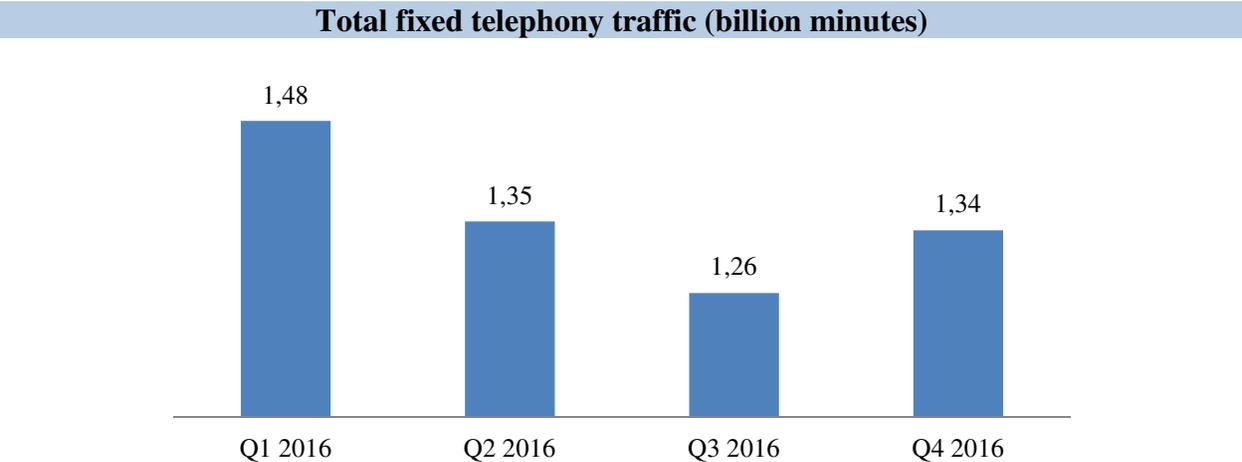
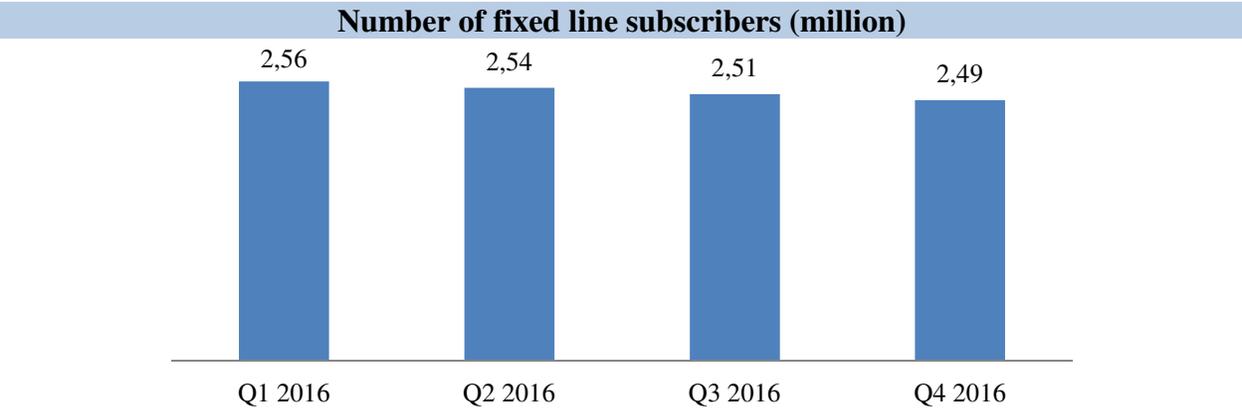
**The Fourth Quarter of 2016**

The Overview presents the data for all four quarters of 2016. The presented data reflect the overall market status for each quarter, including the actual quarterly data for the fixed and mobile market operators and the leading Internet and media content distribution providers, which represent 90% of the market in terms of the number of users, whereas for the remaining 10% of the market were estimated based on the data for 2015 collected in the annual questionnaires. Therefore, the total quarterly report may show discrepancies with respect to the data collected in the regular annual questionnaires. The Agency shall not be held responsible for the correctness of the data submitted by the operators in the quarterly questionnaires.

**Public Fixed Telecommunications Networks and Services**

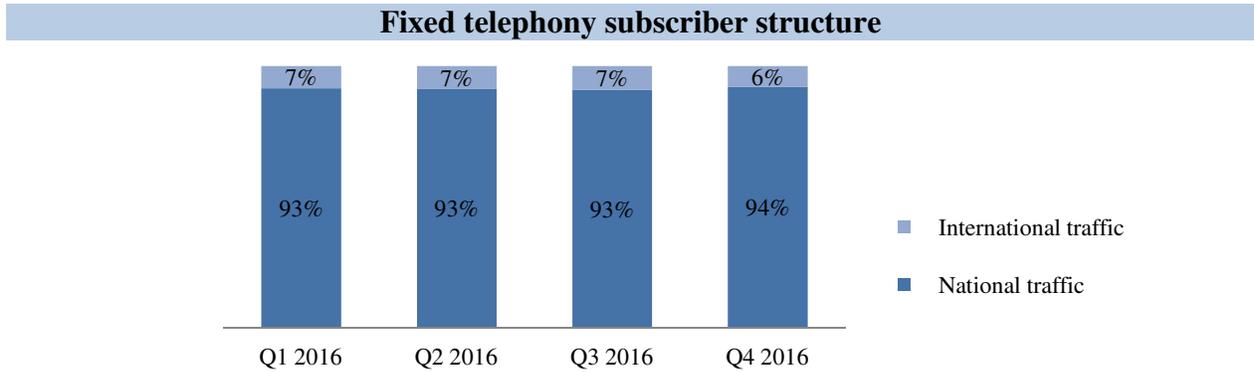
The quarterly indicators for the electronic communications market which are relevant to the fixed telephony comprise the data of the operators that make up 99% of the market.

As on 31 December 2016, the public telephone service over fixed-line network was provided by 30 registered operators. Approximately 2.5 million fixed telephony subscribers generated approximately 1.3 billion minutes of traffic. The market data include the CDMA subscribers and traffic.

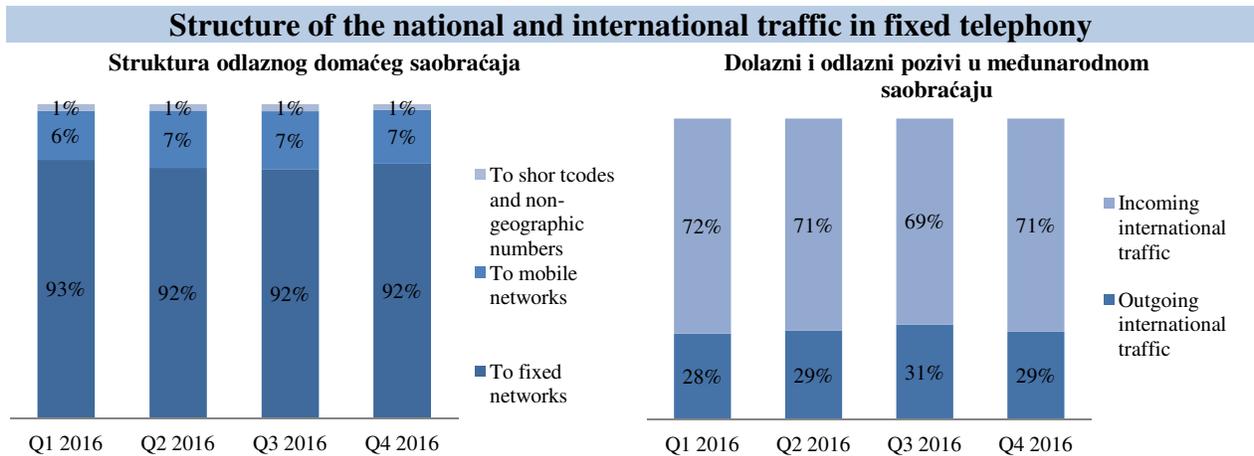


90% of the fixed telephony subscribers are residential users, i.e. natural entities, and the subscriber structure remains constant in the analyzed quarters.

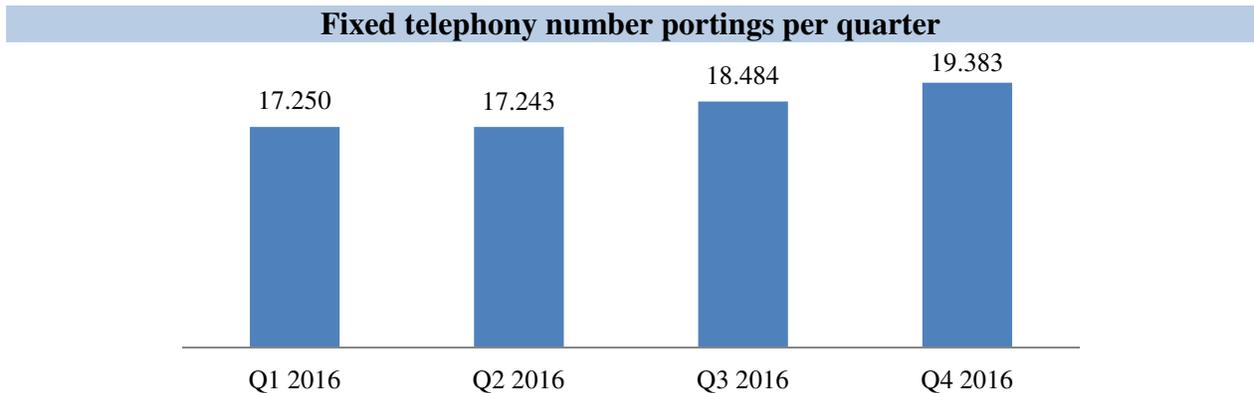
The largest share of the fixed telephony traffic is accounted for by the national traffic, with 94% in Q4.



The outgoing telephone calls are mainly directed towards other fixed networks, while the international traffic is dominated by incoming calls.



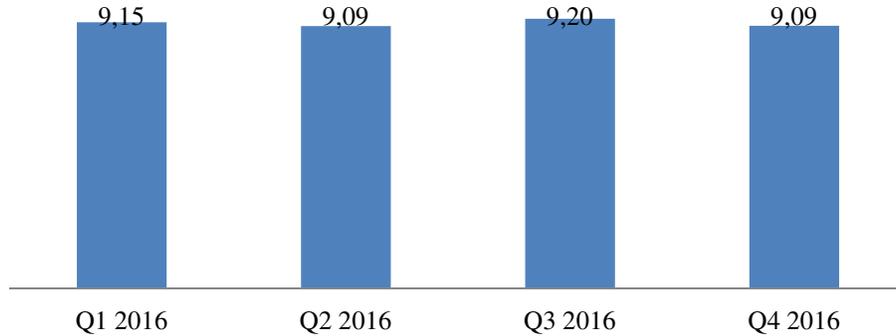
There were 19 000 fixed telephony number portings in the fourth quarter, which is more than 6 thousand per month.



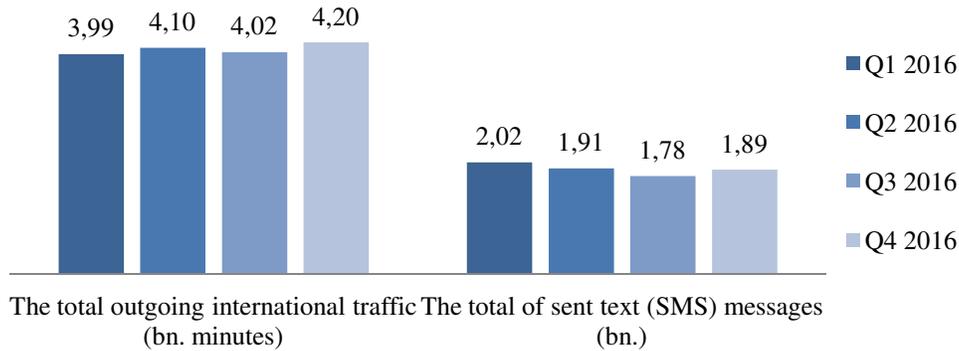
## Public Mobile Telecommunications Networks and Services

The quarterly mobile telephony market indicators include the data submitted by all three operators, i.e. 100% of the market. 9 million active mobile telephony subscribers generated approximately 4 billion minutes of national and international voice traffic and sent approximately 1.9 billion messages quarterly, on average.

### Total number of active mobile telephony subscribers (million)

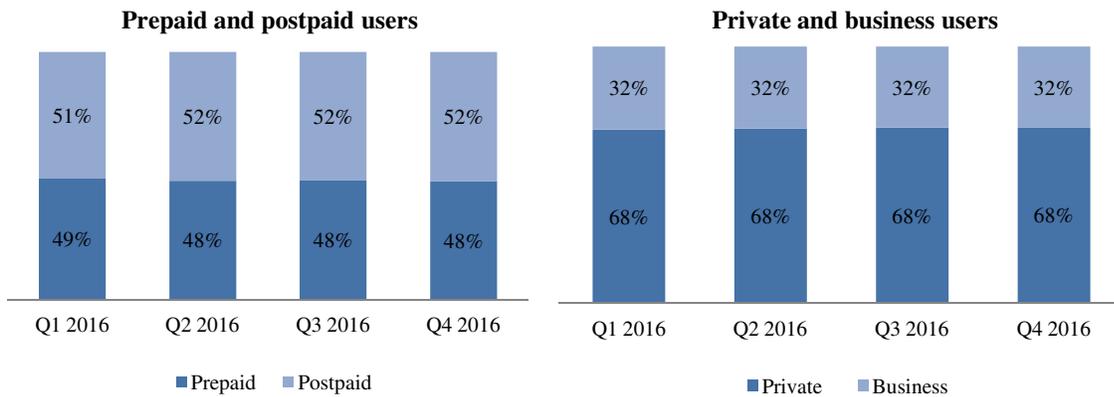


### Generated voice and SMS mobile telephony traffic



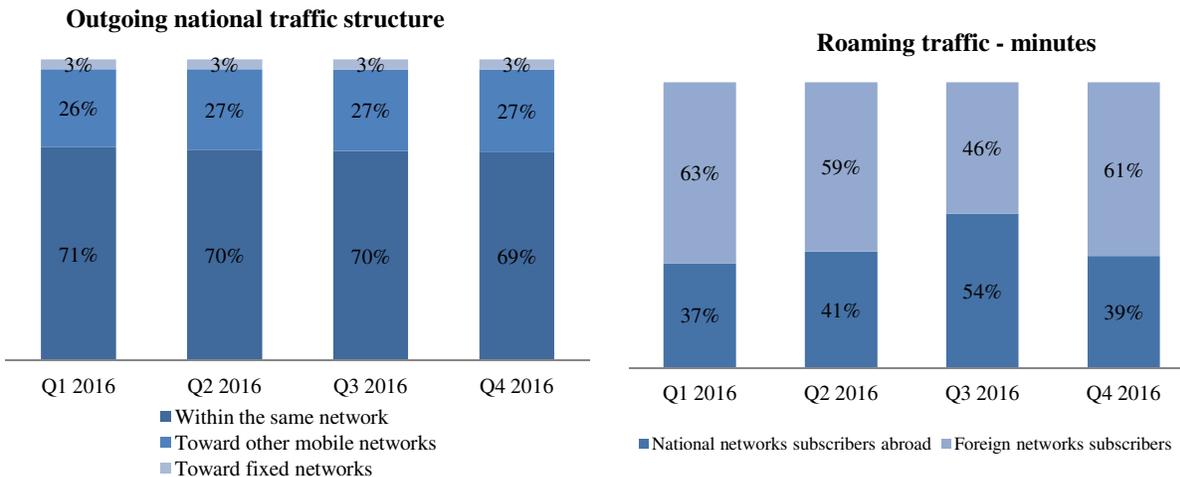
Since the first quarter of 2016, the number of postpaid subscribers has exceeded the number of prepaid subscribers. The postpaid subscribers are still primarily residential users.

## Mobile telephony subscriber structure



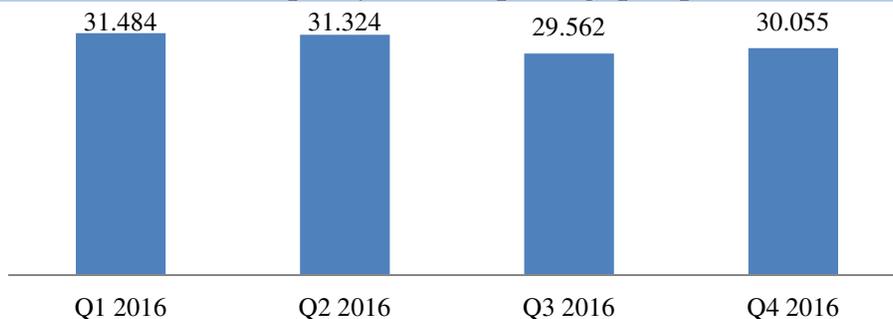
Most outgoing traffic is generated within the same network. More roaming traffic is generated by the subscribers of foreign networks than by the subscribers of national networks.

## Mobile networks outgoing traffic structure



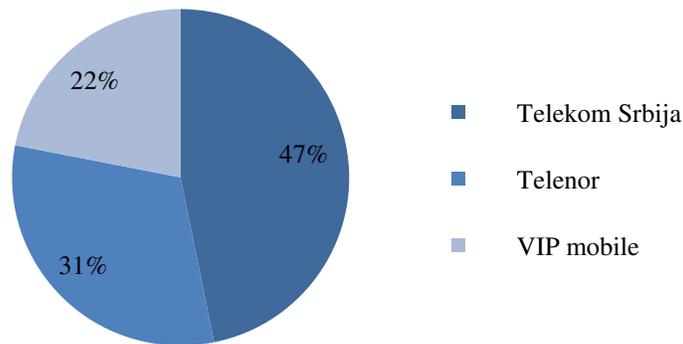
The number of mobile telephony number portings was approximately 30 thousand per quarter, or over 10 thousand per month.

## Mobile telephony number portings per quarter



There haven't been any significant changes in market shares over the analyzed quarters, in terms of the number of users.

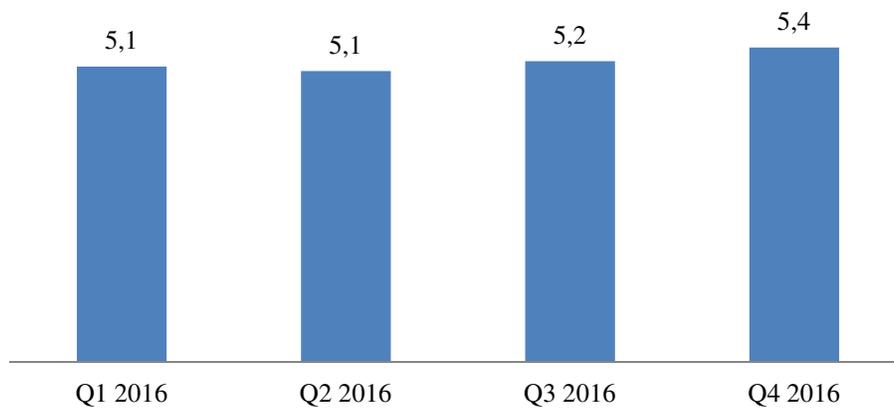
### Market share in terms of the number of users – Q4 2016



In 2016 two virtual mobile operators were entered in the register of the operators. Only one of them began with the commercial provision of services in late 2016.

The number of active mobile broadband subscribers in Q4 was 5.4 million.

### Number of active mobile broadband subscribers (million)

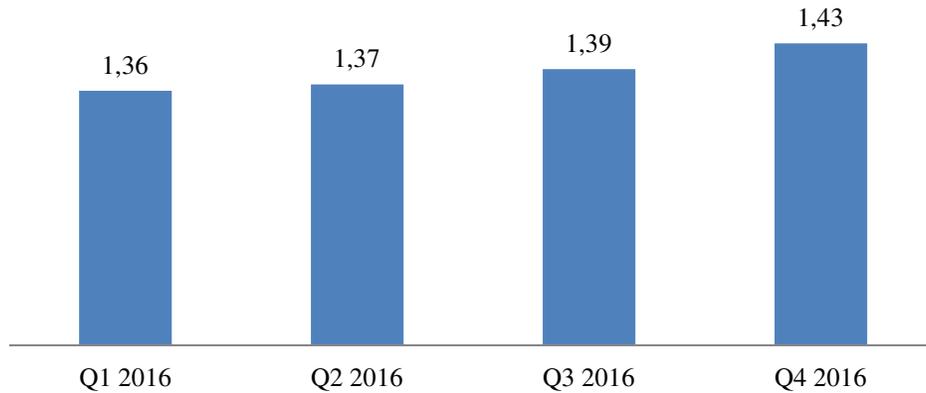


Data transmission over mobile network in Q4 2016 was approximately 14 million GB.

## Internet Services

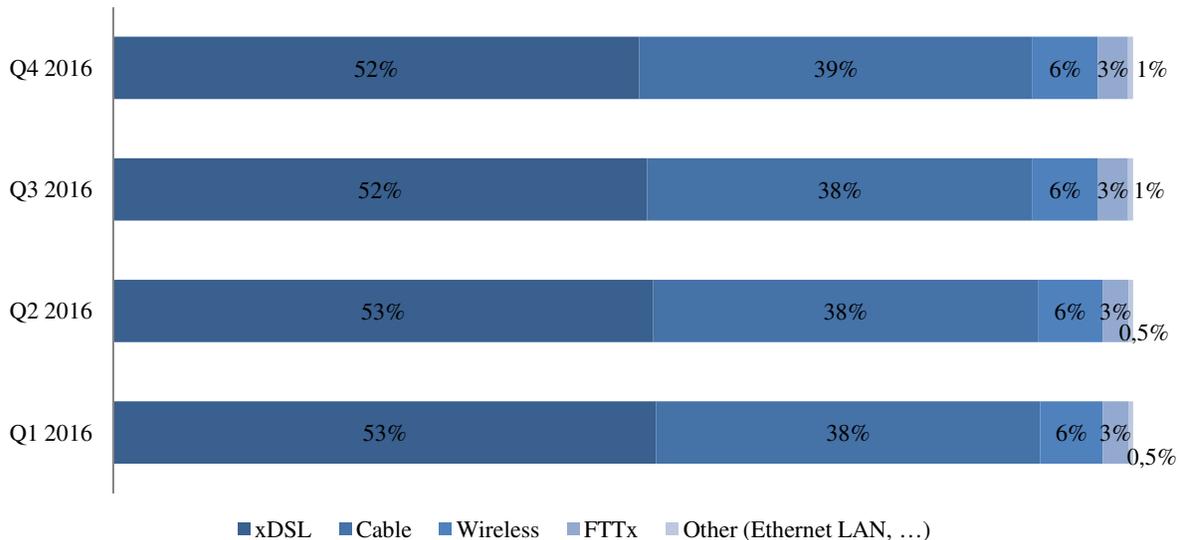
As on 31 December 2016, the Internet services were provided by 198 registered operators. The number of fixed broadband Internet access subscribers was approximately 1.4 million in 2016.

### The number of fixed broadband Internet access subscribers (million)



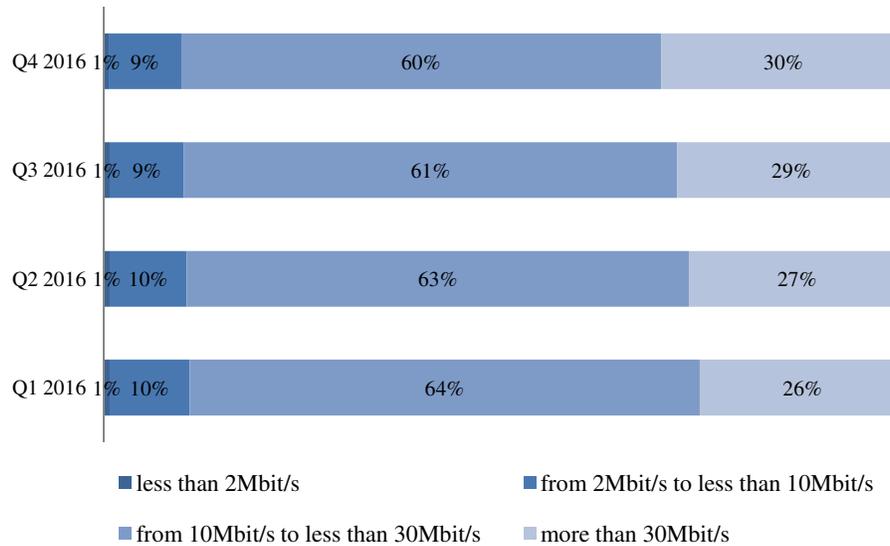
The majority of fixed broadband subscribers have xDSL or cable access.

### Number of subscribers according to type of access



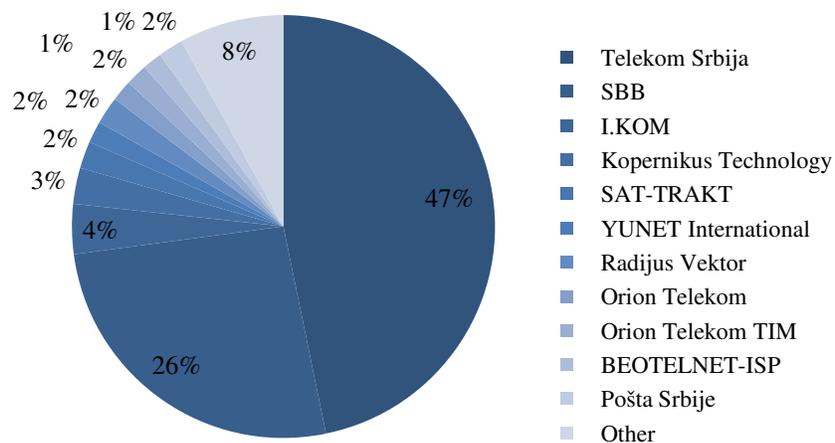
The majority of subscribers in all four quarters of 2016 had access rates between 10 Mbit/s and less than 30 Mbit/s.

### Number of fixed broadband Internet subscribers according to access rate



There haven't been any significant changes in the market shares, in terms of the number of subscribers, when comparing the quarters of 2016.

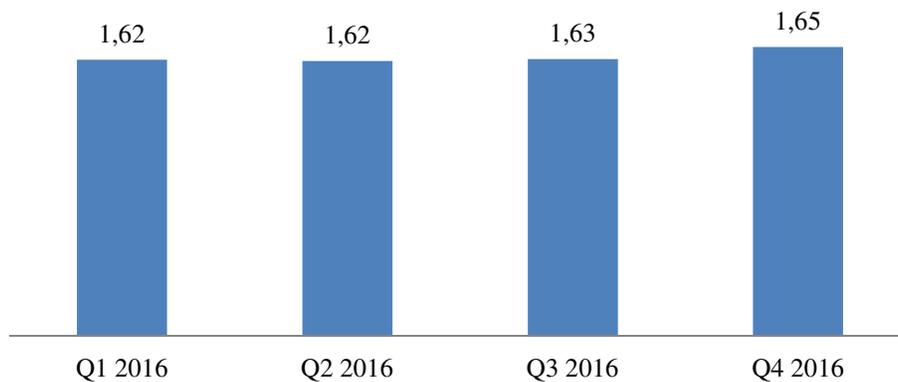
### Market share in terms of number of fixed broadband subscribers – Q4 2016



## Media Content Distribution

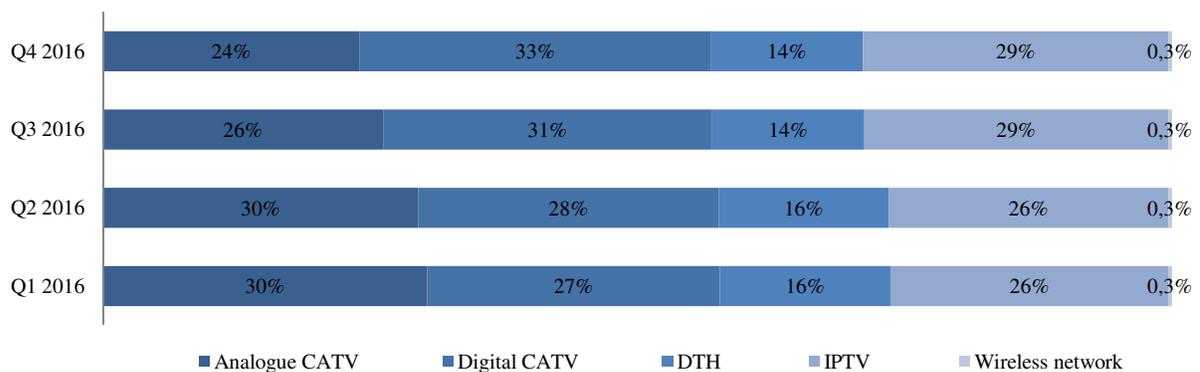
As on 31 December 2016, media content distribution services were provided by 84 registered operators. The number of media content distribution service subscribers was approximately 1.6 million.

**The number of media content distribution service subscribers (million)**



The majority of subscribers use CATV distribution (more than 50%).

**Media content distribution subscribers by type of distribution**



There haven't been any significant changes in market shares over the three-month period, in terms of the number of subscribers, and the leading operators took approximately 90% of the media content distribution market.

## Market share in terms of the number of subscribers in Q4 2016

