Serbia - Telecoms, Mobile, Broadband and Digital Media - Statistics and Analyses

Description: Serbia's cable broadband sector showing further consolidation.

Following an economically and politically turbulent period during the 1990s, Serbia started the first decade of the new millennium with strong GDP growth until the economic crisis of 2008. GDP growth soon recovered but more recently it has been stymied by the poor performance of Serbia's principal trading markets, including Italy and Greece.

Economic difficulties prompted the government to adopt a range of fiscal measures to raise revenue, including a short-term imposition of a 10% tax on telecom services. Similarly, the economic difficulties, compounded by a range of regulatory measures, has seen a steady fall in telecom market revenue suffered due to the recent adverse economic conditions although not all markets were affected equally.

Serbia's integration with the European Union (EU), formalised by the Stabilisation and Association Agreement in 2008, has encouraged the government and regulator to adopted measures aimed at promoting telecoms reform. The Agreement oversees closer integration with the EU and covers commitments to political, economic, trade, or human rights reform. In addition, as part of the EU pre-accession process, Serbia has received financial aid to build public institutions and improve cross-border co-operation. Serbia has been an official EU candidate country since January 2014.

EU reforms have been fundamental to Serbia's telecom sector. The EU's regulatory framework for communications (the NRF), adopted in mid-2010, promotes competition as the most efficient way to offer communications products and services while ensuring universal access. However, the May 2012 election of a new government less inclined to compromise with EU, though still committed to joining the Union, may have implications for telecom sector regulatory measures.

Considerable network investment has been undertaken by incumbent and alternative operators in recent years, despite economic difficulties. This has helped to stimulate internet usage, which has also been bolstered by improved affordability as prices are reduced through competition.

Serbia boasts an extensive broadcasting market, with programming available via radio and TV programme distribution via cable, wireless cable, terrestrial free-to-air and broadband TV. An analogue switch off (ASO) plan has been adopted and digital TV is widely available on cable networks.

Serbia's high mobile penetration, the result of multiple SIM card use, has seen lower revenue in recent years, placing further pressure on operators to develop business models which encourage consumer use of mobile data services as also the continued substitution of fixed-line for mobile voice calls.

Key Developments:
Telekom Serbia focussed on network upgrades rather than privatisation; Mundio Mobile and Globaltel licensed as MVNOs hosted on Vip Mobile's network; SBB given approval to acquire I.KOM; Telekom Serbia; Telenor Serbia and SBB launch joint multi-play service; regulator licences three MNOs for spectrum in the 800MHz band, stimulating LTE development; Telenor Serbia upgrades mobile network with carrier aggregation technology, begins transition to an all-IP architecture; report update includes the regulator's 2015 annual report, market report to December 2016, telcos' operating and financial data to Q1 2017, recent market developments.

Market penetration rates in Serbia's telecoms sector 2016 (e)
Penetration of telecoms services: Penetration
Fixed-line telephony: 36.1%
Fixed broadband: 17.9%
Mobile SIM (population): 129.1%

Companies mentioned in this report:
Mobilna Telefonija Srbija (MTS), Telekom Serbia, Vip Mobile, Telenor Serbia, Serbia Broadband (SBB), I.KOM,
Knight Development Support, Invest-Inenjering, Beogrid, JET TV, Kopernikus Technology, BeotelNet, Sat Trakt, Telemark and Radijus vektor.

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