

---

# The Dynamics of Broadband Markets in Bosnia and Herzegovina

Aleksandra Drakulić

Department of interconnection and market regulation

Budva, Montenegro

28 – 29 September 2023



Bosna i Hercegovina  
**Regulatorna agencija za komunikacije**  
Босна и Херцеговина  
**Регулаторна агенција за комуникације**  
Bosnia and Herzegovina  
**Communications Regulatory Agency**



# OPERATORS

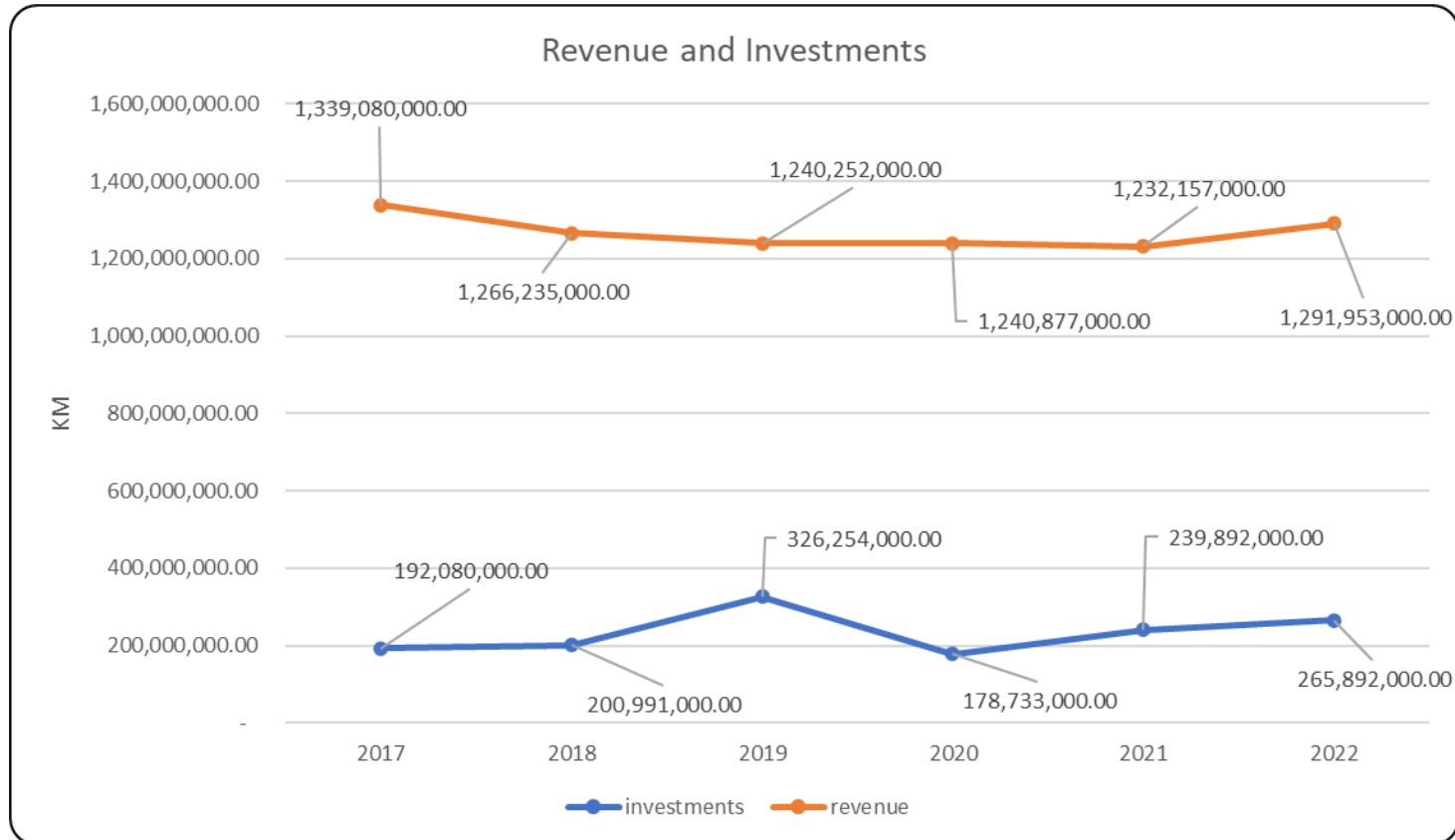
- 13 fixed telephony operators
- 3 MNOs and 4 providers of mobile telephone services (SP)
- 61 ISPs
- 27 AVM operators

# Total revenue from all telecommunication services

YEAR	REVENUE (KM)	GDP (KM)	CONTRIBUTION TO GDP (%)
2017	1,339,081,000.00	31,803,000,000.00	4.21
2018	1,266,234,859.00	33,942,000,000.00	3.73
2019	1,240,252,331.00	35,785,000,000.00	3.47
2020	1,240,877,266.00	34,727,000,000.00	3.57
2021	1,232,157,274.00	39,107,000,000.00	3.15
2022	1,291,952,958.00	47,309,000,000.00	2.73

Source: Agency for Statistics of Bosnia and Herzegovina, The Central Bank of Bosnia and Herzegovina, Reports from telecom operators

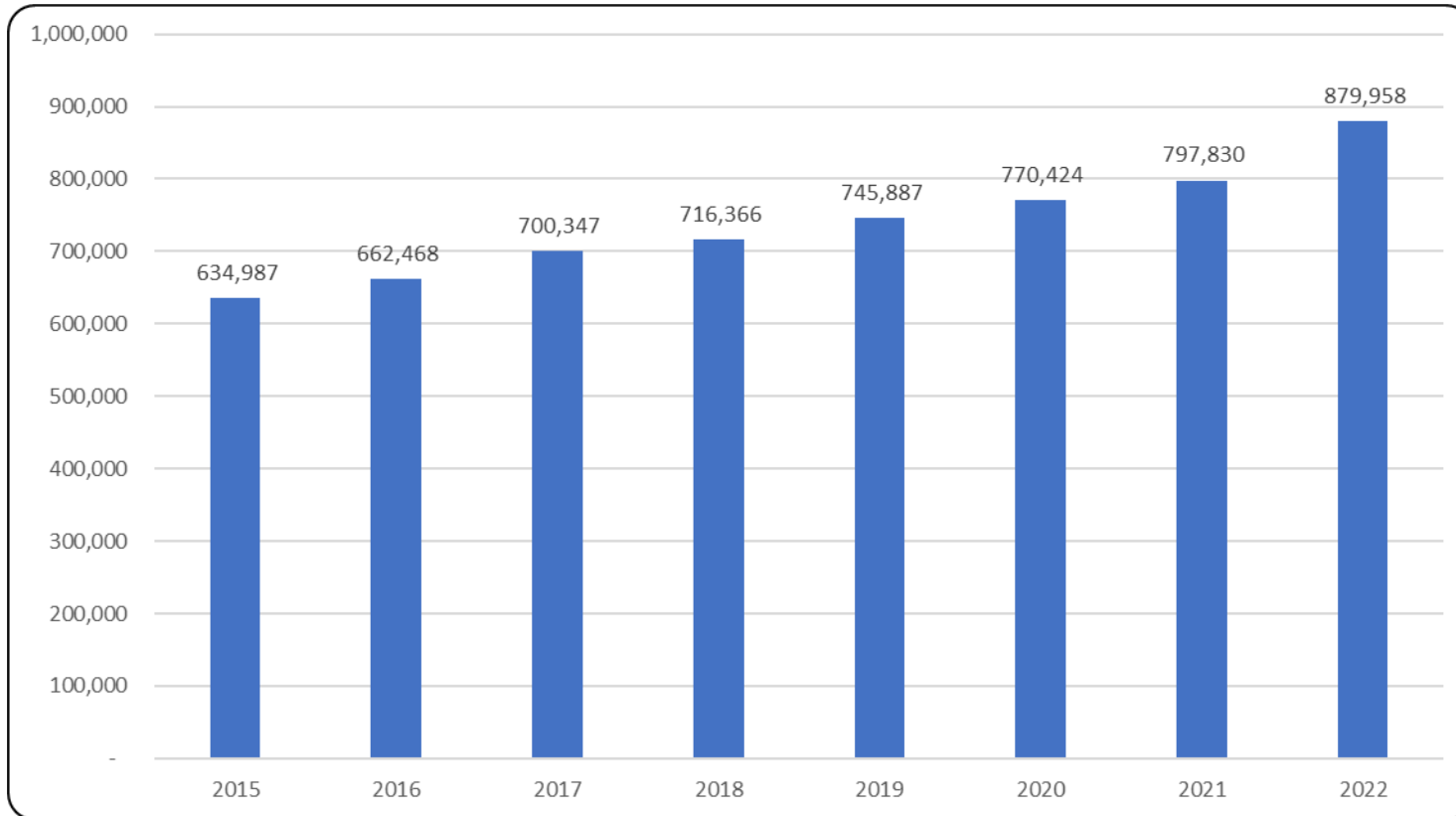
# Revenue and investments



- a slight increase in income in 2022
- a significant increase in investments in 2019

Source: Reports from telecom operators

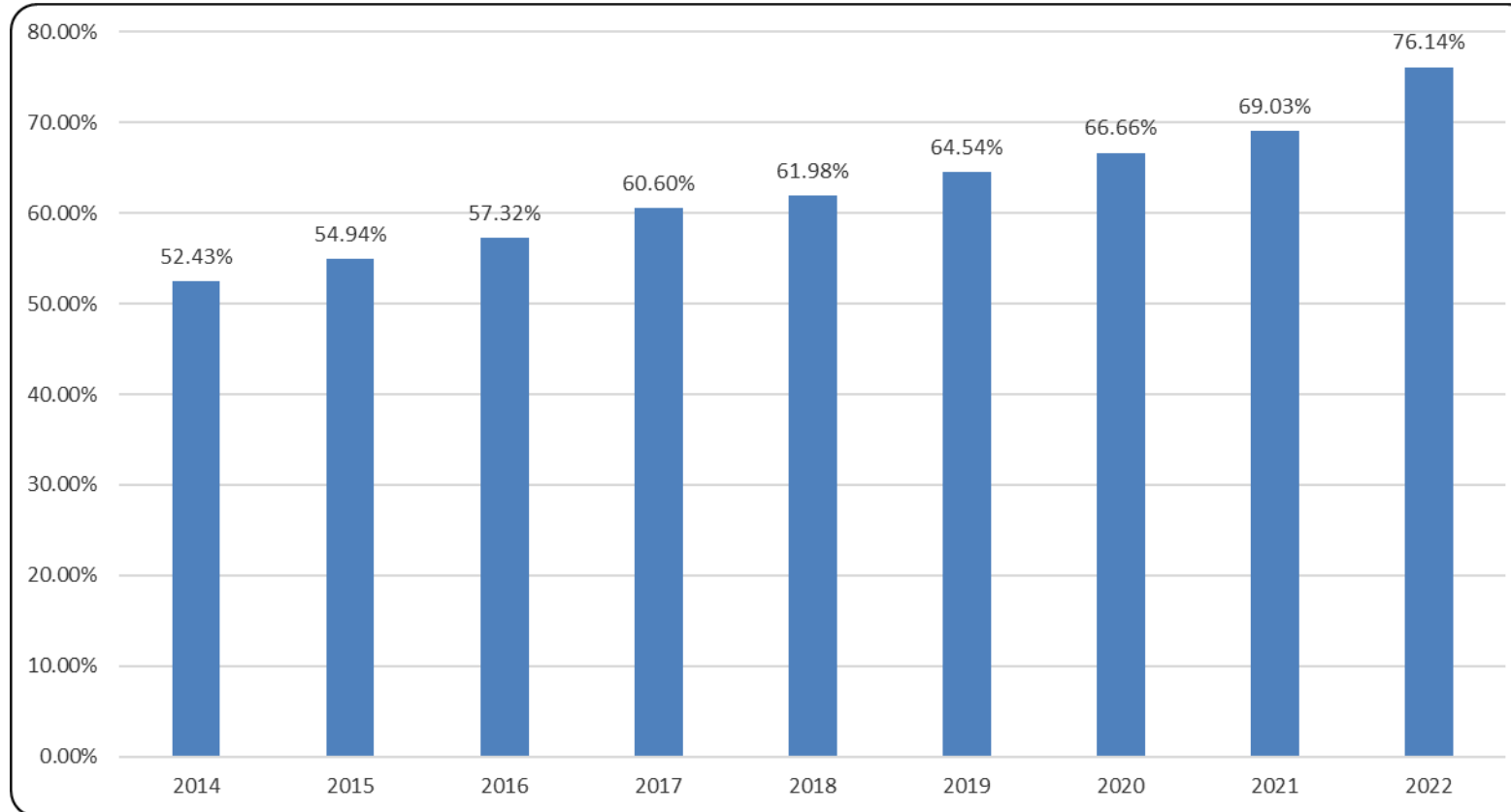
# Fixed broadband: Connections



- 10.3% increase in 2022

Source: Reports from telecom operators

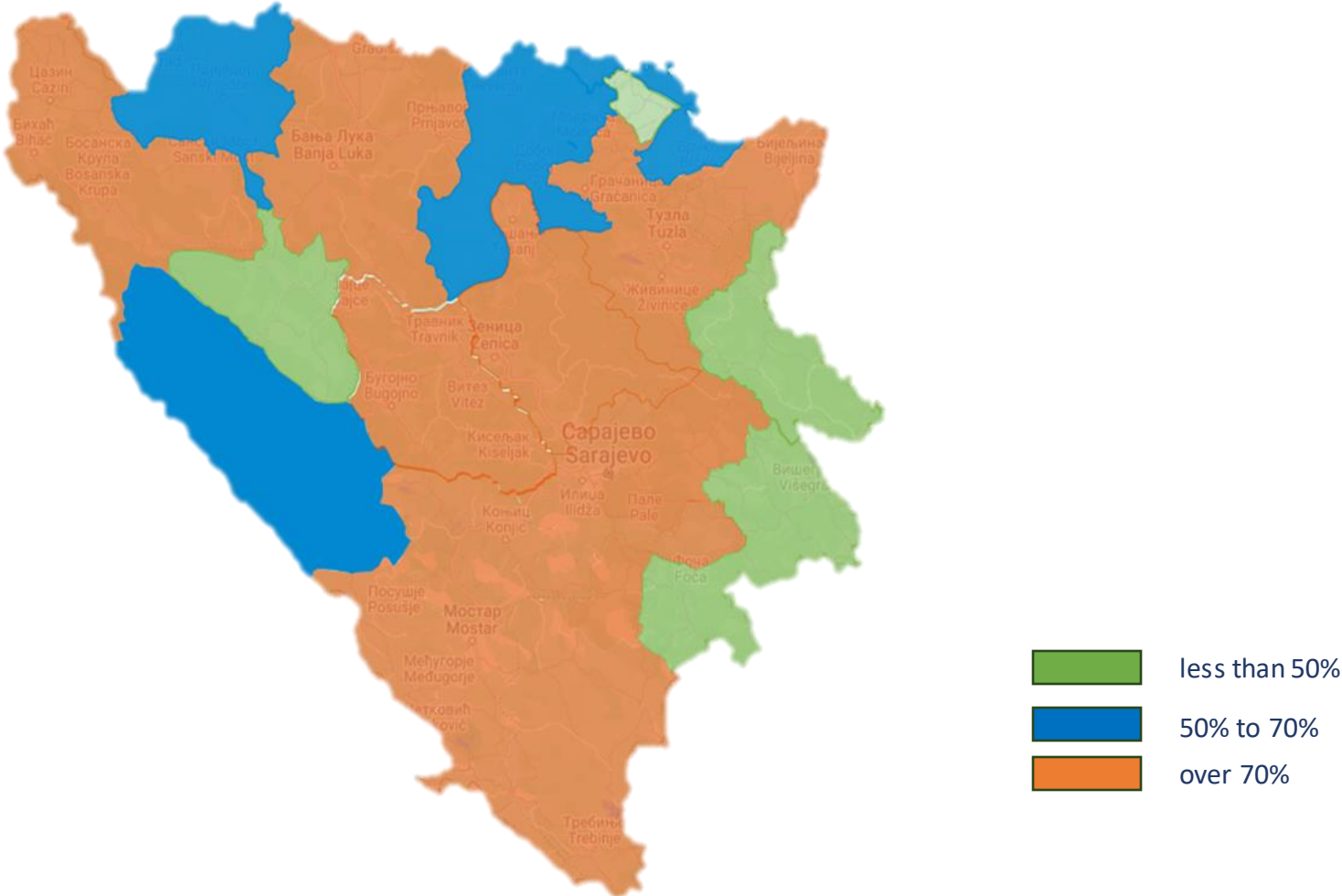
# Fixed broadband: Penetration rate (% of households)



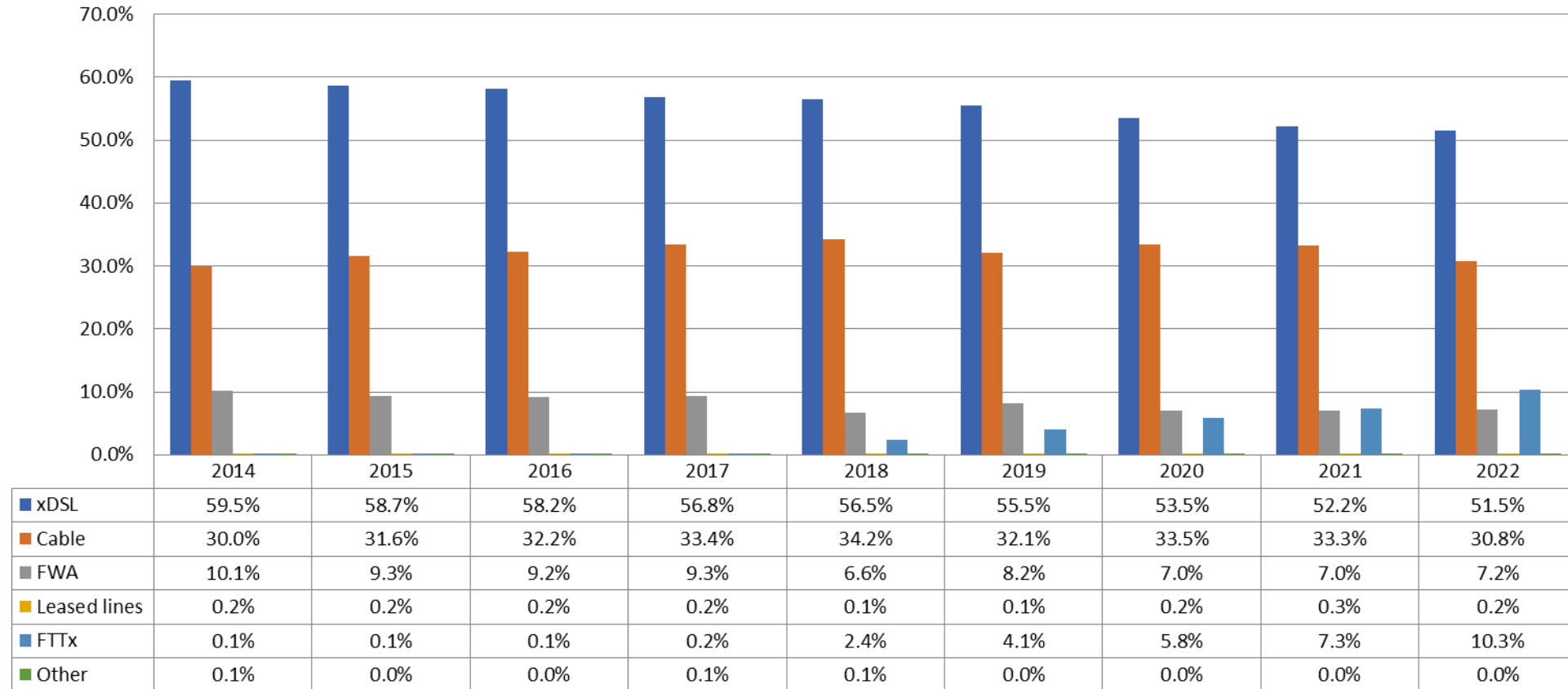
- B&H penetration rate in 2022 comparable to EU in 2021 (77.83%)

Source: Reports of telecom operators

# Fixed broadband: Penetration rate by region (% of households)



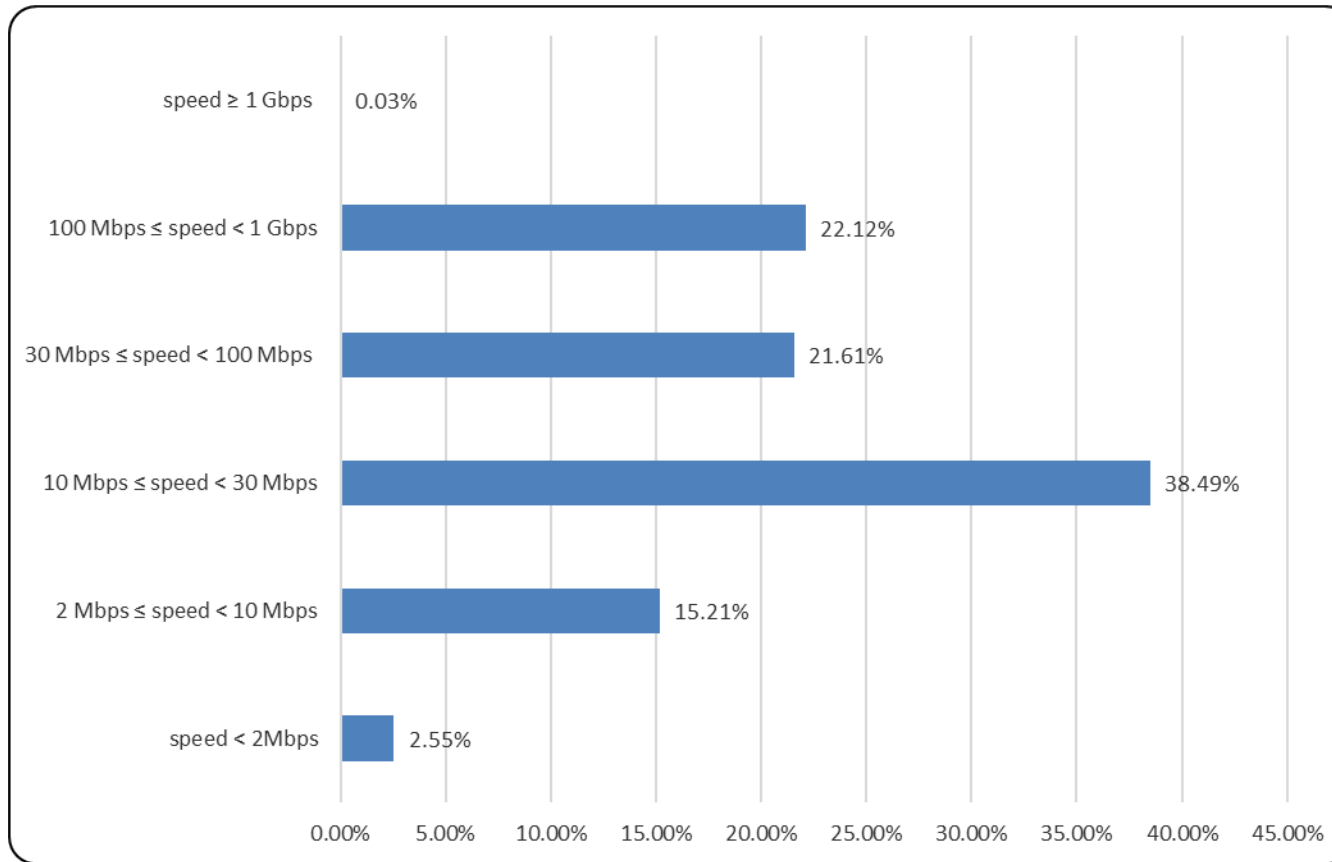
# Fixed broadband: Subscriptions, by technology



Source: Reports of telecom operators



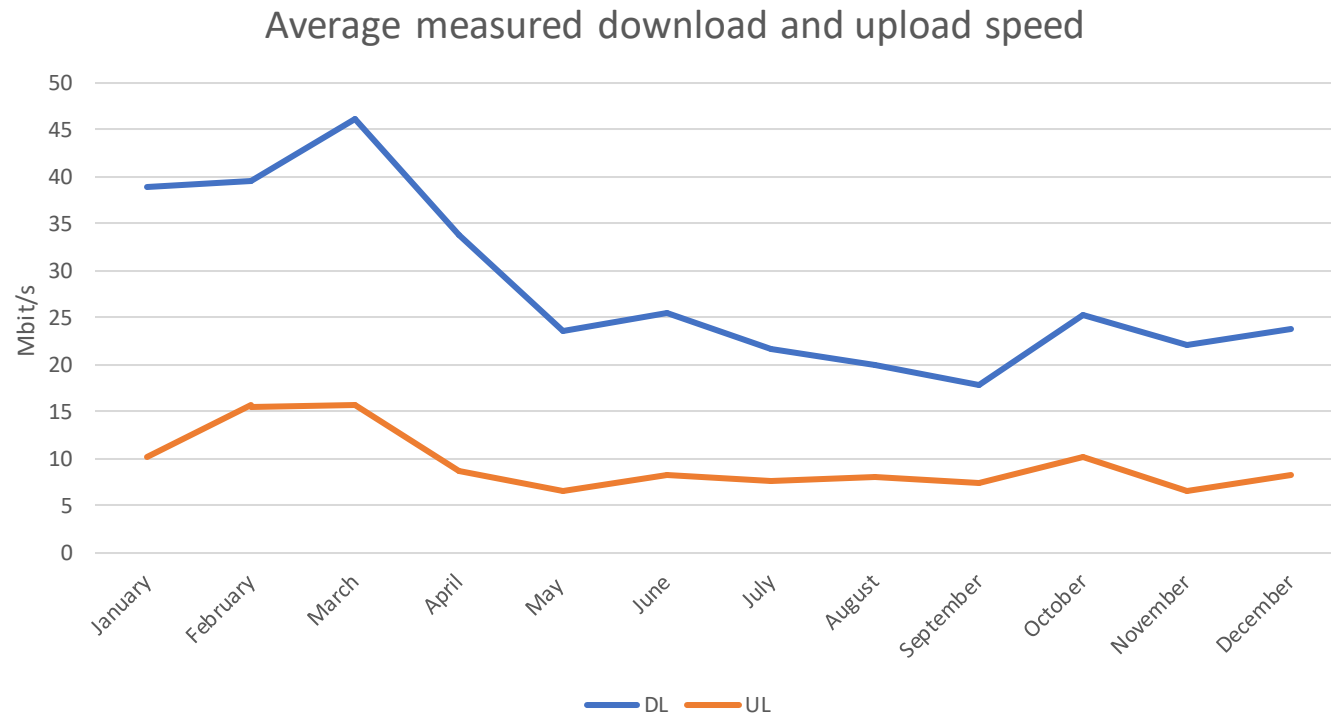
# Fixed broadband: Subscriptions, by speed



- 16.84% of households use fixed broadband at speed 100 Mbps to less than 1 Gbps
- 0.02% of households use fixed broadband at a speed equal to or above 1 Gbps
- B&H is significantly lagging behind the EU average – 40.6% of households in the EU use fixed broadband access at speed 100 Mbps to less than 1 Gbps, and 7.58% of households use fixed broadband access at a speed equal to or above 1 Gbps

Source: Reports of telecom operators

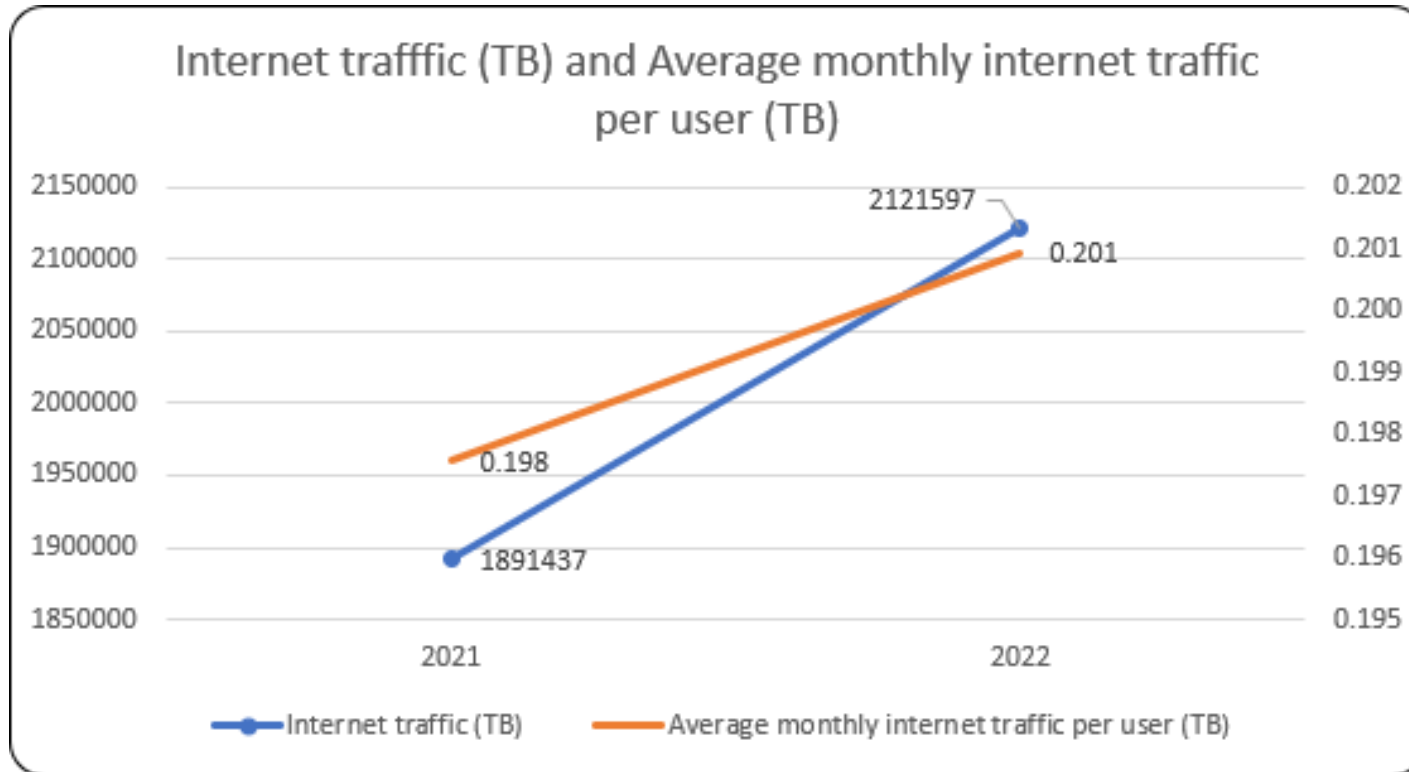
# Fixed broadband: CRA NetTest app results in 2022 (over 10,000 measurements)



- The average download (DL) speed was 28.16 Mbit/s
- The average upload (UL) speed was 9.42 Mbit/s

Source: CRA Annual report on quality of broadband access in 2022

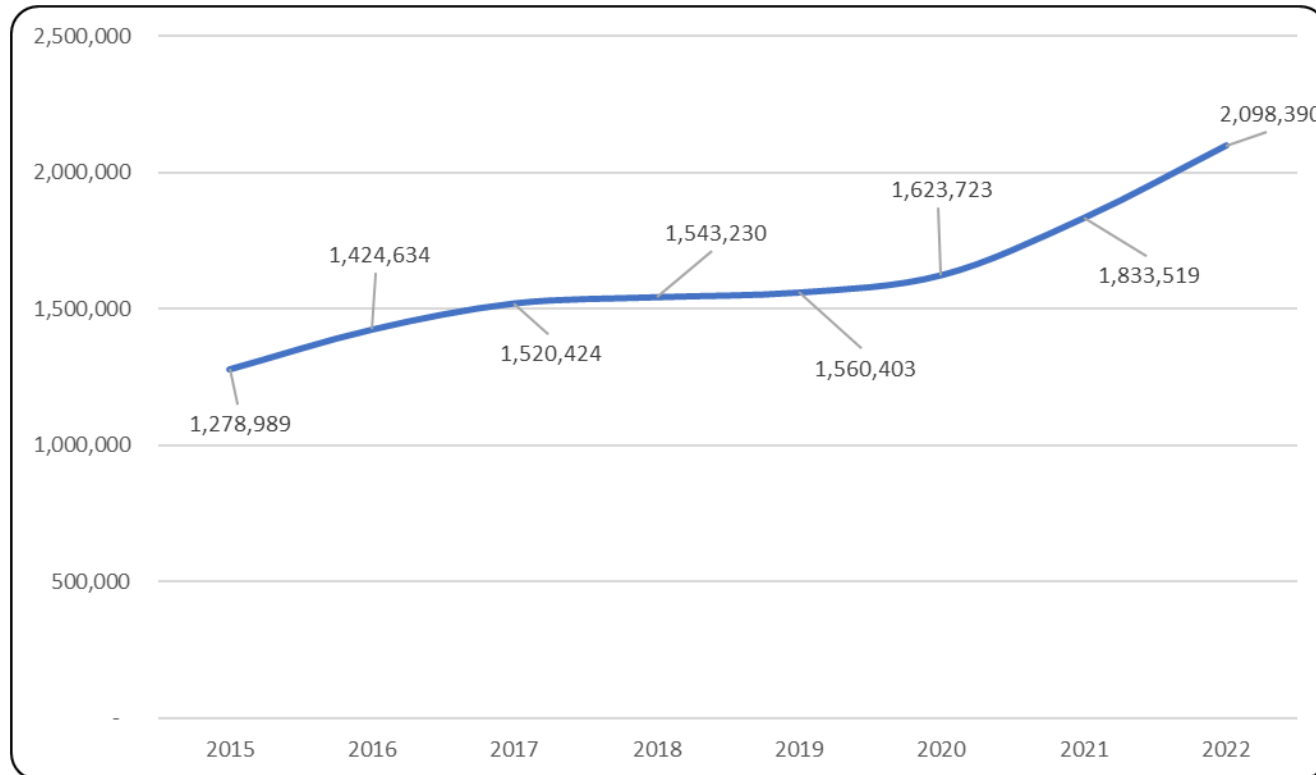
# Fixed broadband: Volume of Internet traffic



- In 2022 average monthly Internet traffic per user increased by 1.70%

Source: Reports of telecom operators

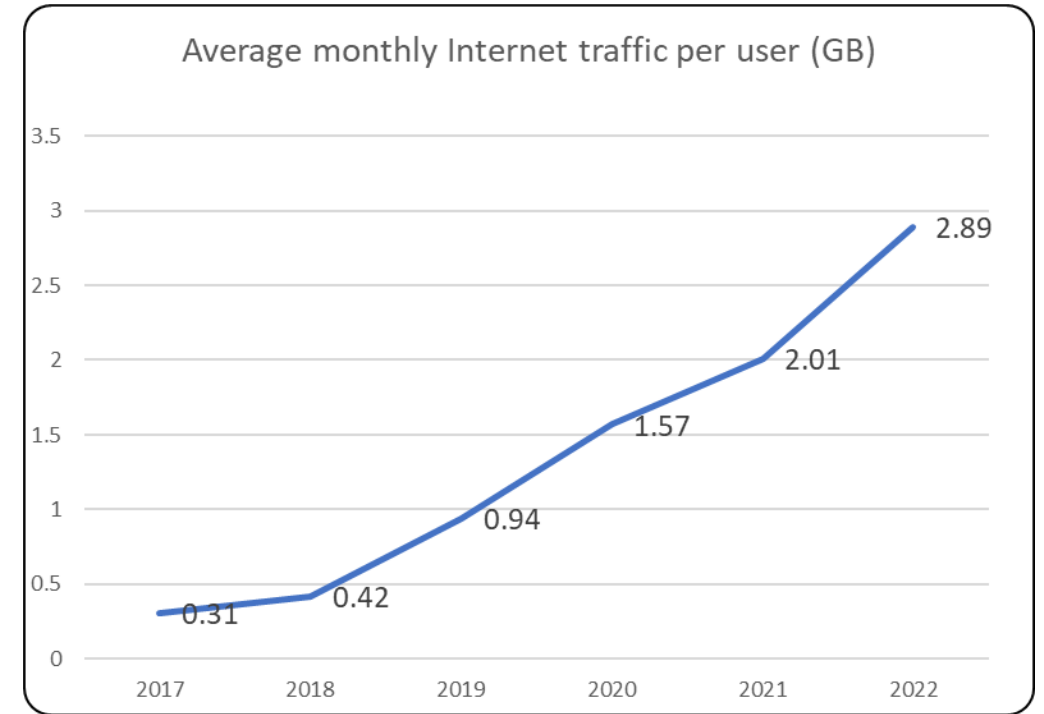
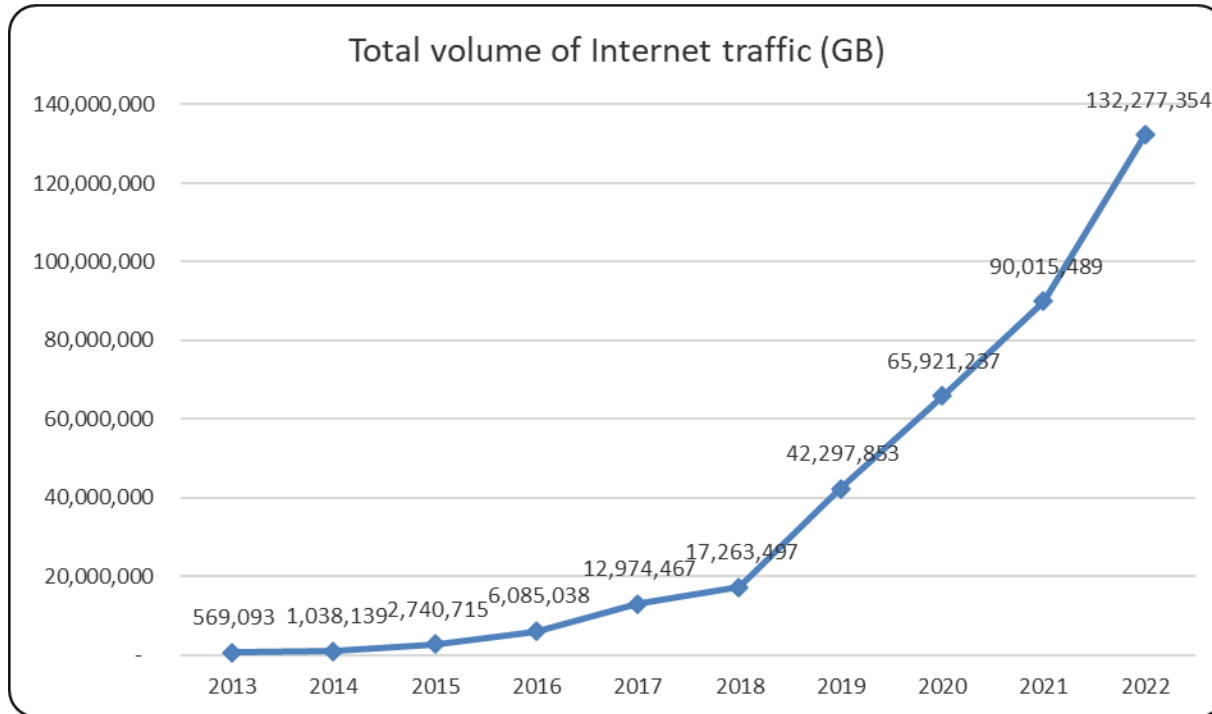
# Mobile broadband: Subscriptions



- 14.44% increase in 2022
- 34.48% increase since 2019

Source: Reports of telecom operators

# Mobile broadband: Volume of Internet traffic



Source: Reports from telecom operators

- Compared to 2021, the volume of Internet traffic in 2022 has increased by 47%

# Mobile broadband: Coverage (UMTS + LTE)

BH Telecom	December 31, 2020	December 31, 2021	December 31, 2022	Licence obligation
Travel routes (%)	75.20	84.14	98.60	70% by the end of 2022
Land coverage (%)	64.48	75.96	79.41	60% by the end of 2022

Telekom Srpske	December 31, 2020	December 31, 2021	December 31, 2022	Licence obligation
Travel routes (%)	90.56	91.26	96.30	70% by the end of 2022
Land coverage (%)	78.90	81.00	81.64	60% by the end of 2022

HT Mostar	December 31, 2020	December 31, 2021	December 31, 2022	Licence obligation
Travel routes (%)	84.00	84.19	86.97	70% by the end of 2022
Land coverage (%)	66.20	66.74	69.50	60% by the end of 2022

Source: Reports from telecom operators

# Future activities

- In the summer of 2023, the Ministry of Communications and Transport of B&H held Public consultations on the Draft Broadband Strategy and the Draft Electronic Communications Policy for the period 2023 – 2027.
- The main activities defined by those two strategic documents are:
  - a) Adopting a law on electronic communications in line with the EU *acquis* by the end of December 2024
  - b) Completion of broadband mapping by the end of May 2027
  - c) Simplifying the procedures preceding the issuance of permits for building broadband infrastructure by the end of May 2025
  - d) Issuing a license for the use of RF spectrum for the provision of services through 5G networks by the end of 2026.
- Adopting a methodology for checking quality parameters (KPI) of services in mobile networks is planned in the coming period.

---

THANK YOU FOR YOUR ATTENTION!



[www.rak.ba](http://www.rak.ba)  
info@rak.ba

