

# Roaming regulation

## Case study on Serbia

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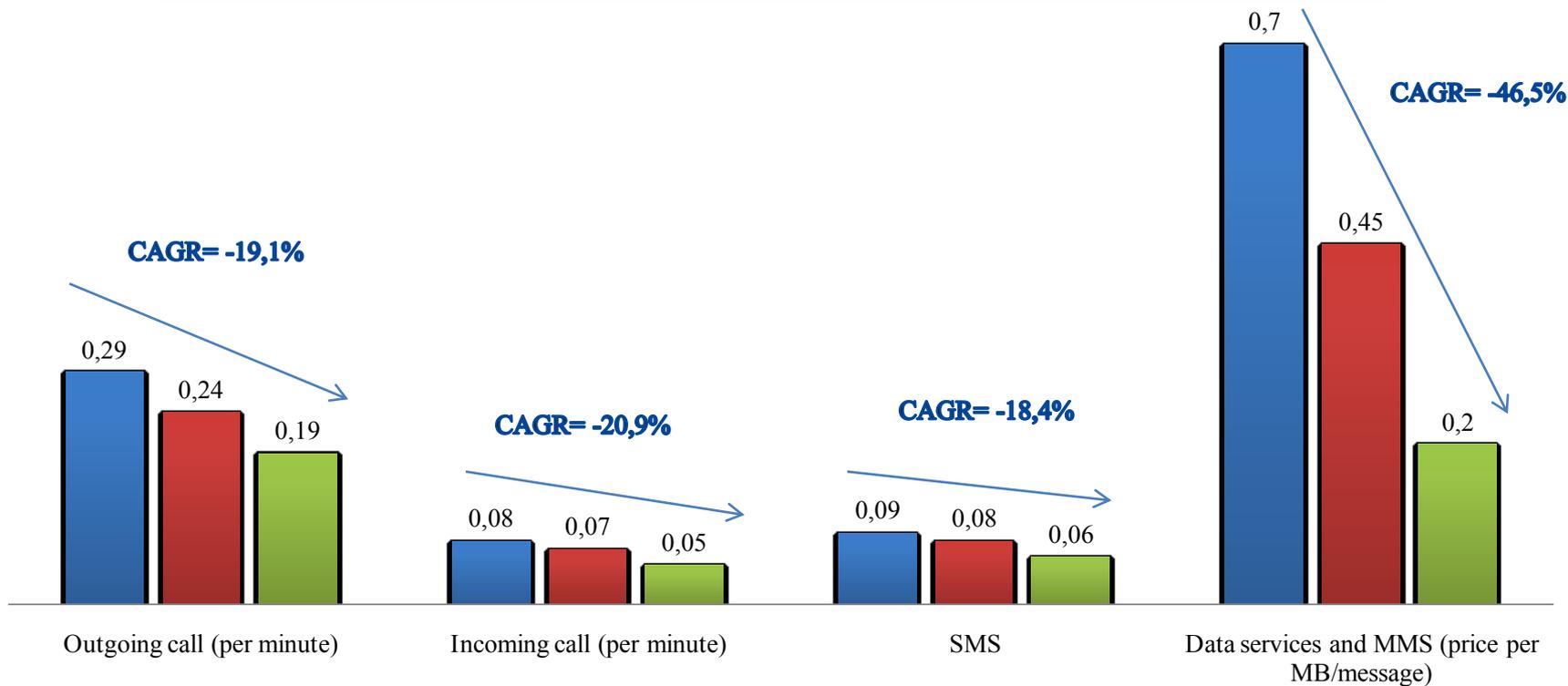
**Budva, 2016**

## Roaming regulation in Serbia

- Agreement on reducing the prices of roaming services on public mobile communications networks among ministries responsible for the area of electronic communications from Bosnia and Herzegovina, Republic of Macedonia, Montenegro and Republic of Serbia was signed on 29 September 2014.
- In December 2014 RATEL's Managing Board brought the Decision which sets out the implementation schedule for maximum prices applied to wholesale and retail charges for calls, SMS, MMS and data.

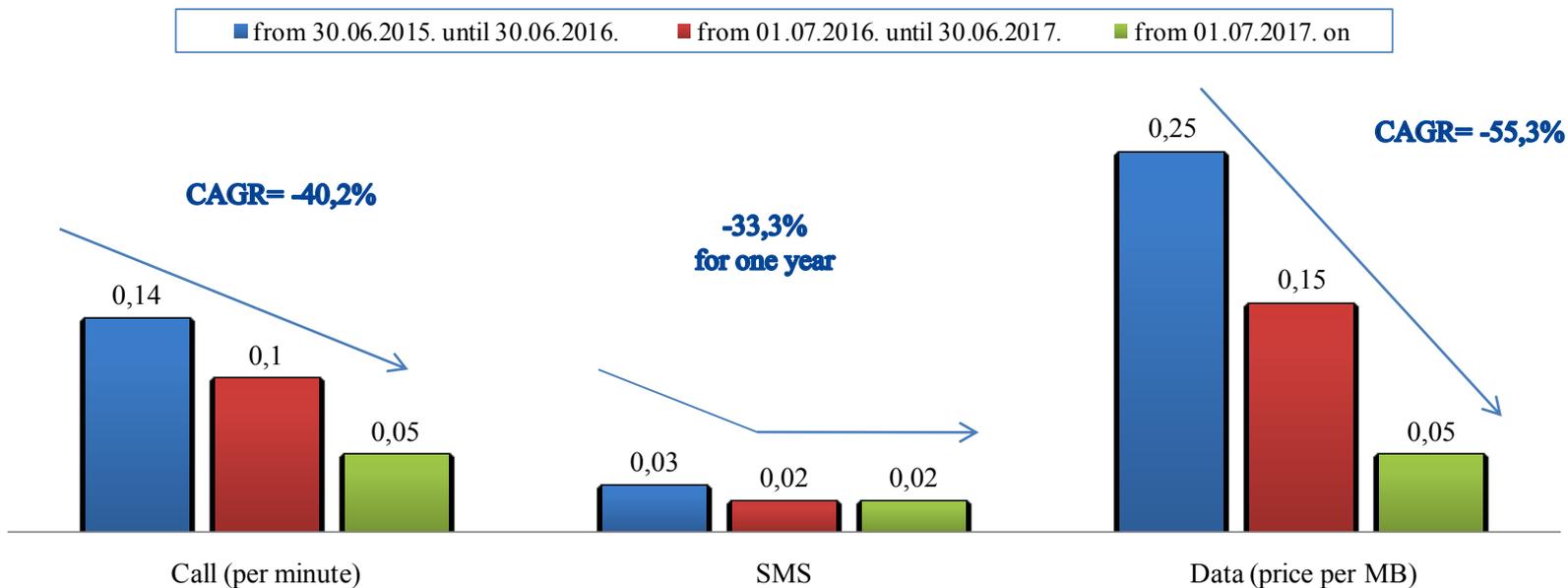
# Maximum retail roaming charges

■ from 30.06.2015. until 30.06.2016. ■ from 01.07.2016. until 30.06.2017. ■ from 01.07.2017. on



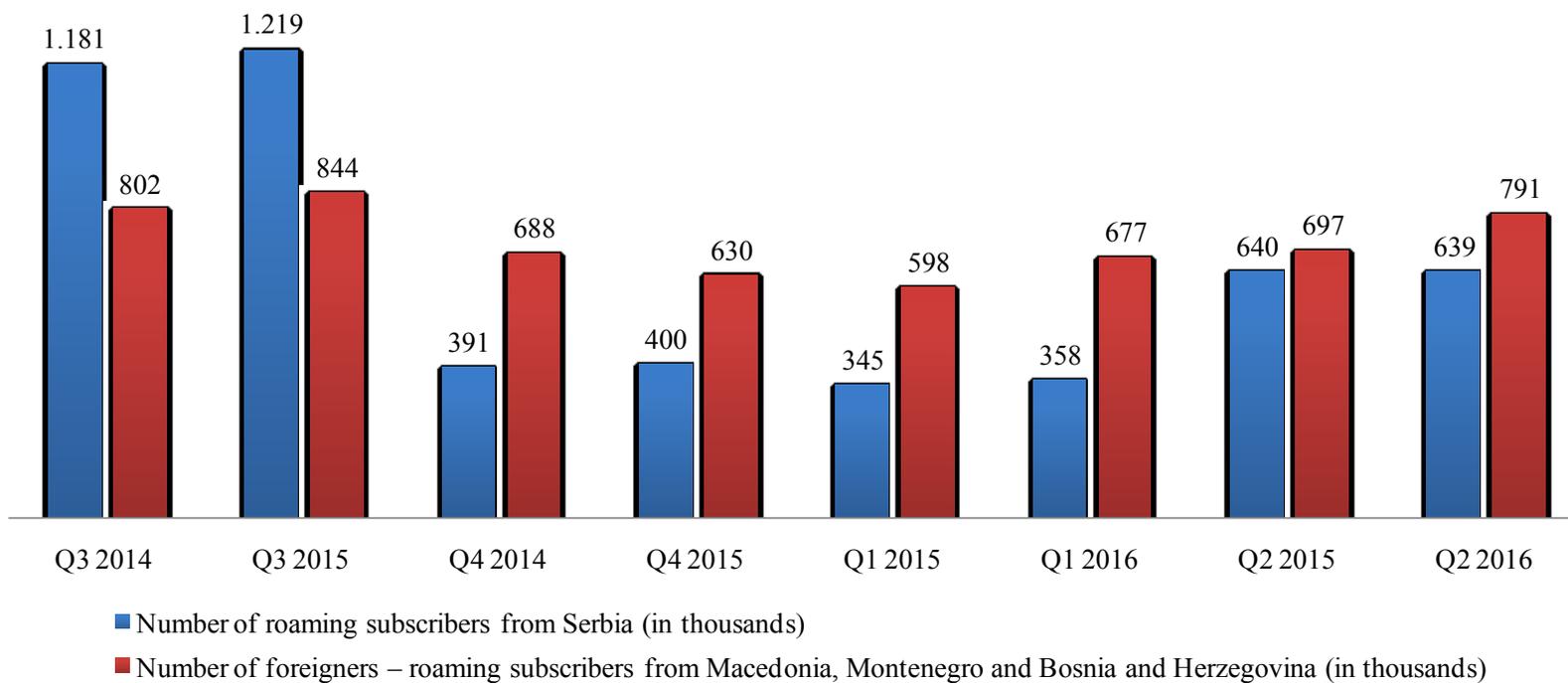
\*prices in euros, VAT excluded

# Maximum average wholesale roaming charges



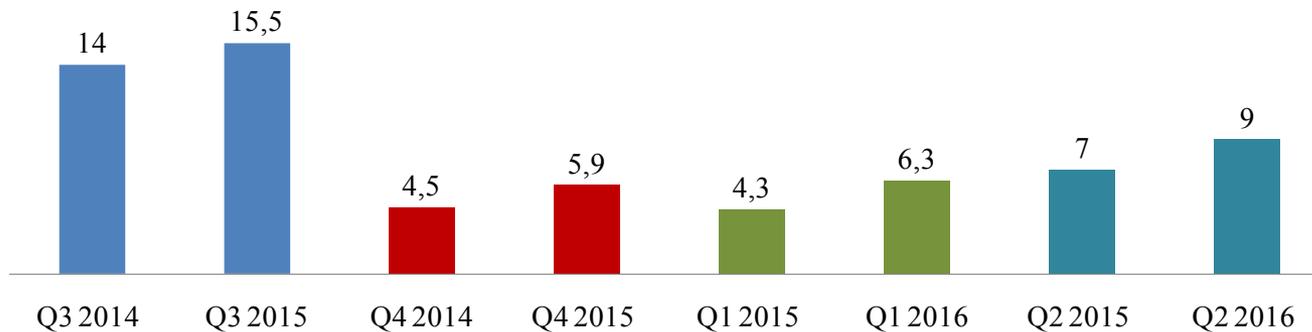
\*prices in euros, VAT excluded

## Roaming subscribers



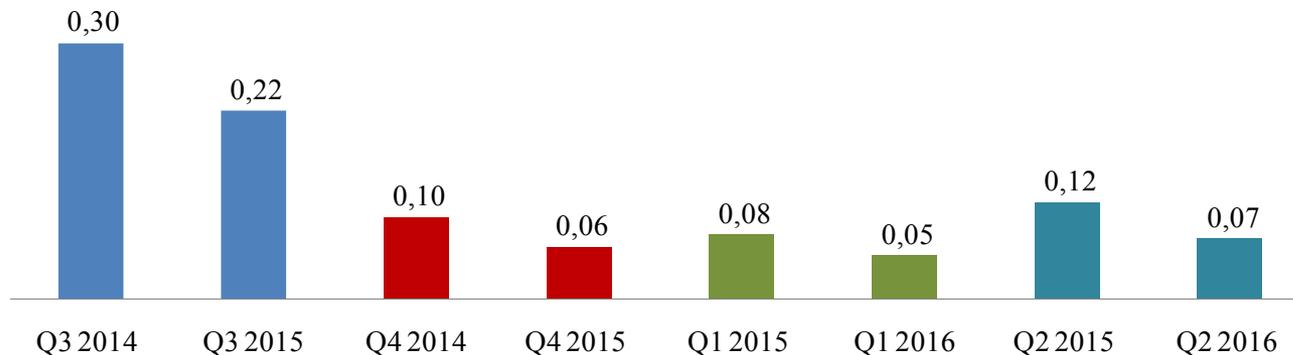
# Retail roaming outgoing calls - prepaid

## Outgoing calls (millions of minutes) - prepaid



**Outgoing calls** increased by 10,7% in Q3 2015, 31% in Q4 2015, 46,5% in Q1 2016 and 28,6% in Q2 2016 compared to the same periods previous year

## Outgoing calls income (millions of euros) -prepaid

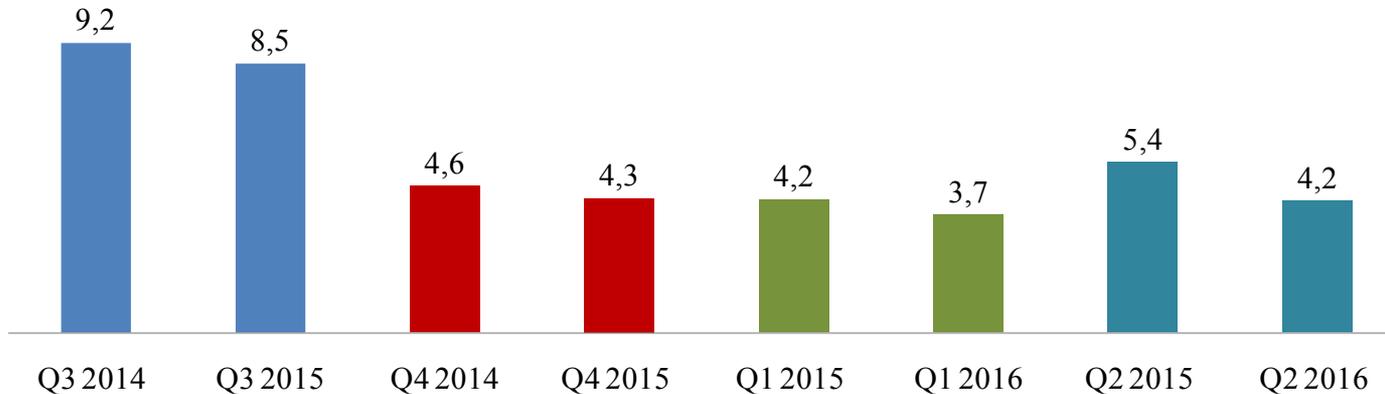


**Outgoing calls income** decreased by 26,7% in Q3 2015, 40% in Q4 2015, 37,5% in Q1 2016 and 41,7% in Q2 2016 compared to the same periods previous year

*\*All presented data on retail level include traffic from tariff add-ons and exclude income from tariff add-ons*

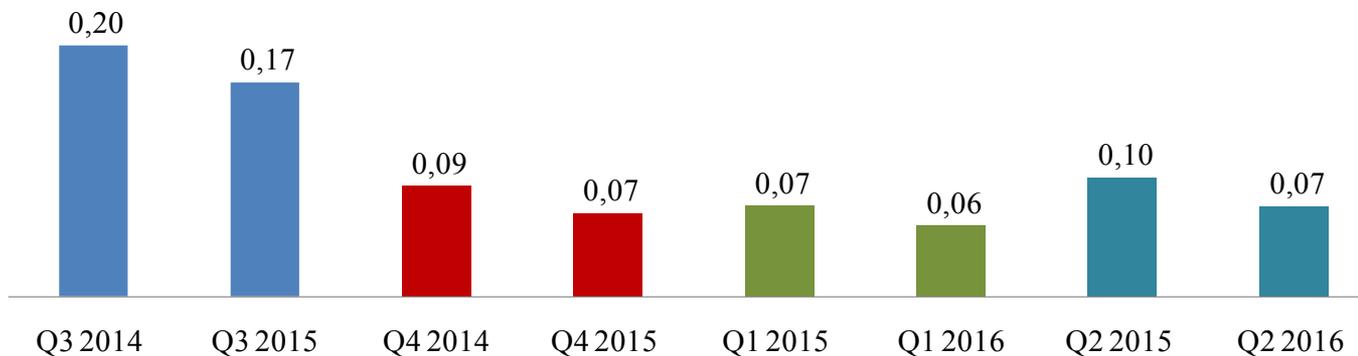
## Retail roaming incoming calls – prepaid

**Incoming calls (millions of minutes) - prepaid**



**Incoming calls** decreased by 7,6% in Q3 2015, 6,5% in Q4 2015, 11,9% in Q1 2016 and 22,2% in Q2 2016 compared to the same periods previous year

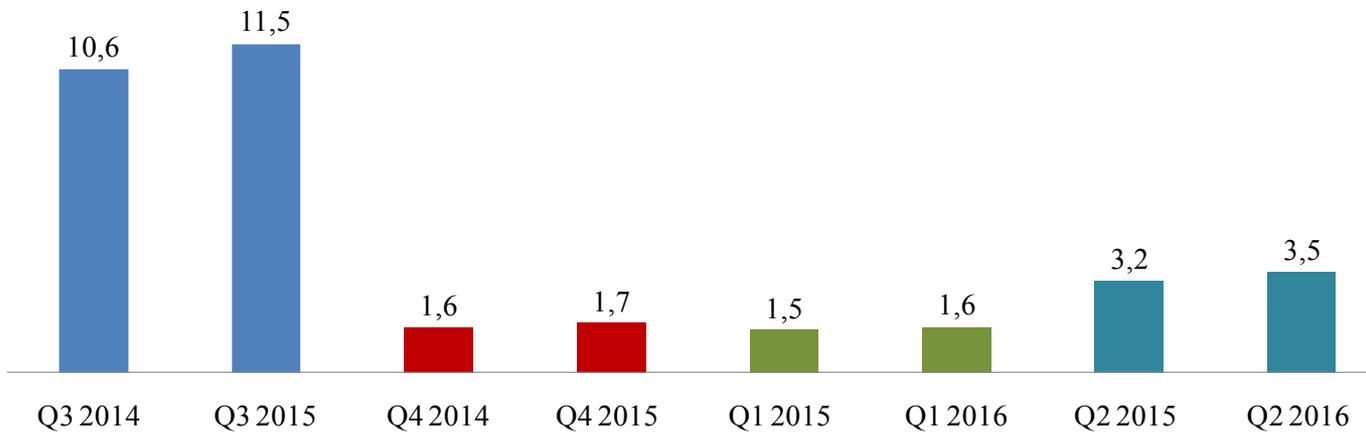
**Incoming calls income (millions of euros) -prepaid**



**Incoming calls income** decreased by 15% in Q3 2015, 22% in Q4 2015, 14,3% in Q1 2016 and 30% in Q2 2016 compared to the same periods previous year

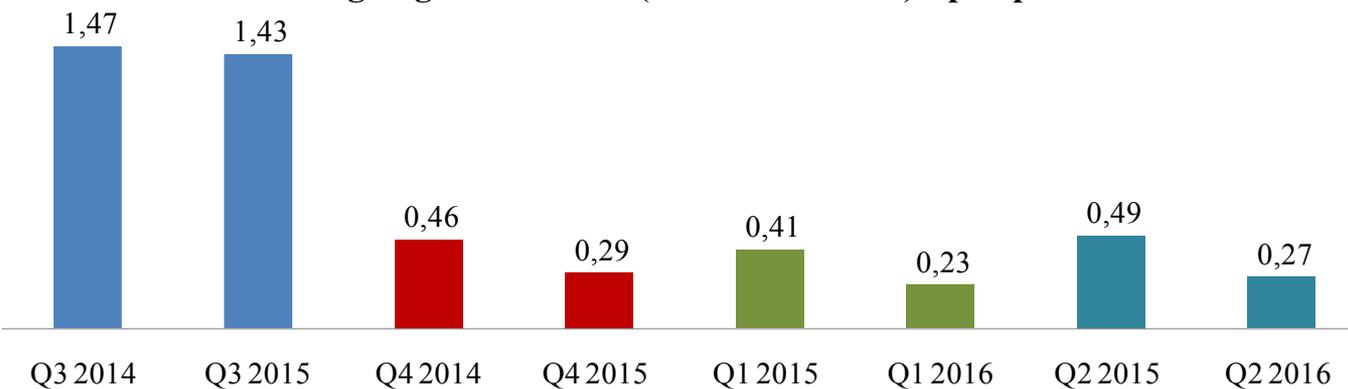
# Retail roaming outgoing calls – postpaid

**Outgoing calls (millions of minutes) - postpaid**



**Outgoing calls** increased by 8,5% in Q3 2015, 6,3% in Q4 2015, 6,7% in Q1 2016 and 9,4% in Q2 2016 compared to the same periods previous year

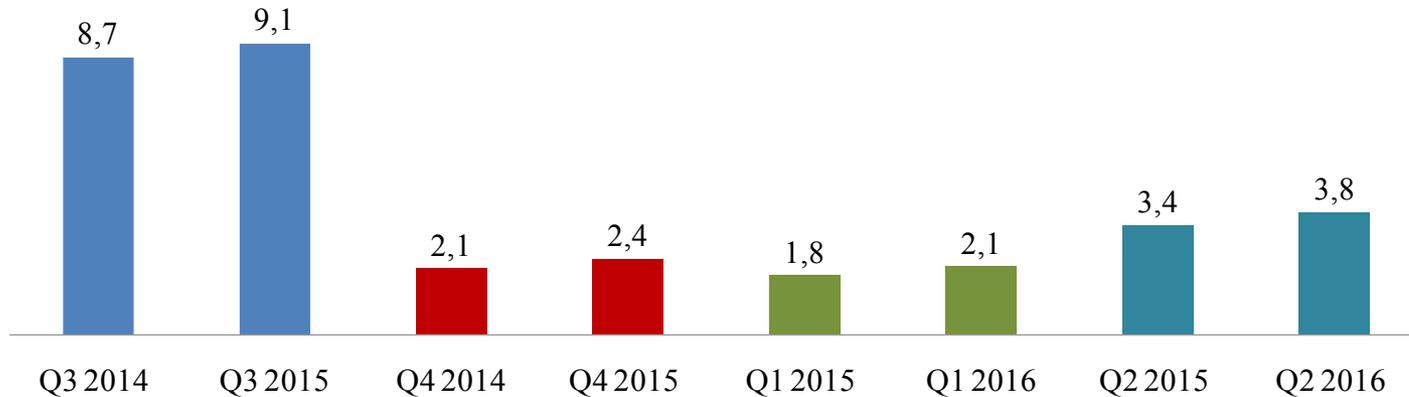
**Outgoing calls income (millions of euros) - postpaid**



**Outgoing calls income** decreased by 2,7% in Q3 2015, 37% in Q4 2015, 43,9% in Q1 2016 and 44,9% in Q2 2016 compared to the same periods previous year

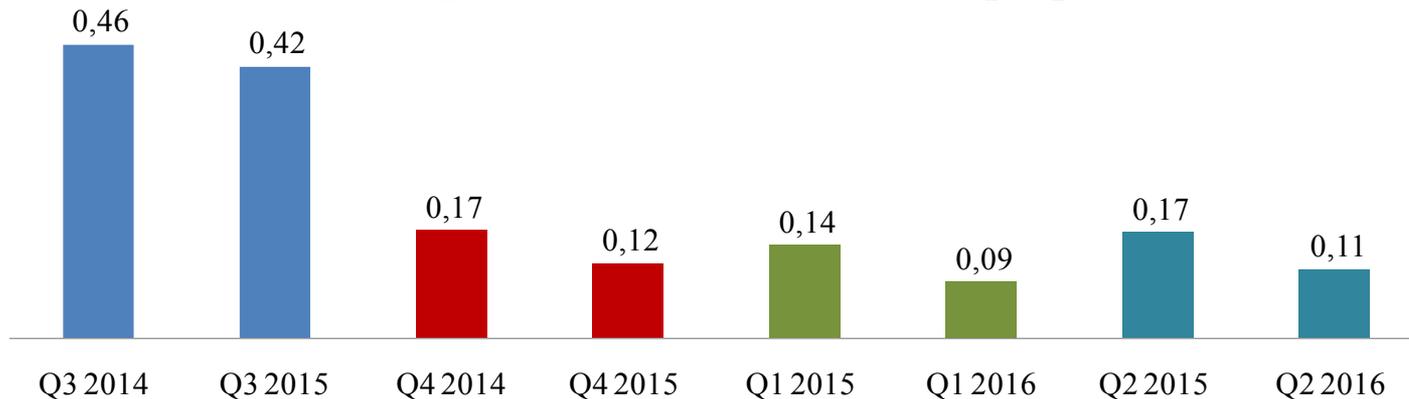
# Retail roaming incoming calls - postpaid

## Incoming calls (millions of minutes) - postpaid



**Incoming calls** increased by 4,6% in Q3 2015, 14,3% in Q4 2015, 16,7% in Q1 2016 and 11,8% in Q2 2016 compared to the same periods previous year

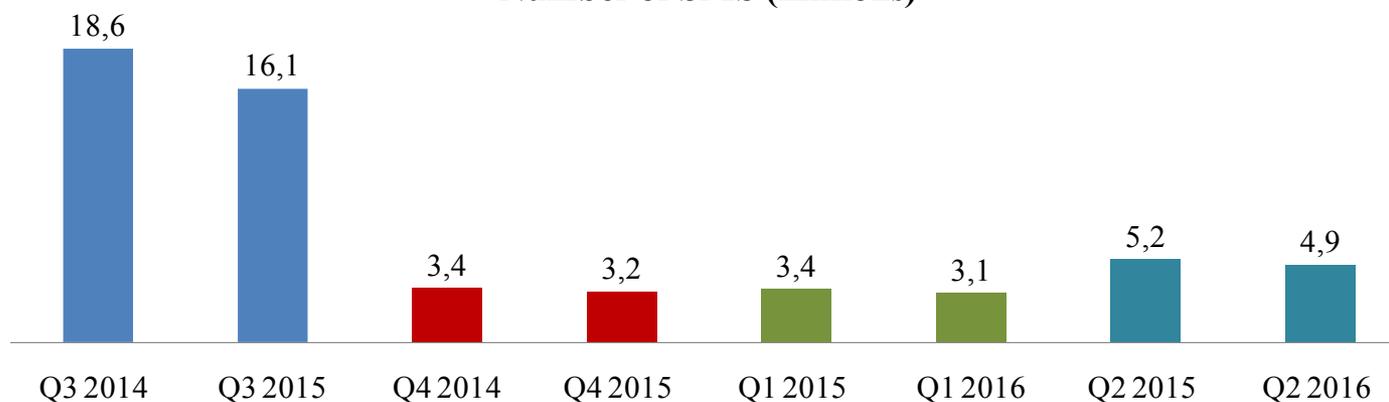
## Incoming calls income (millions of euros) - postpaid



**Incoming calls income** decreased by 8,7% in Q3 2015, 29,4% in Q4 2015, 35,7% in Q1 2016 and 35,3% in Q2 2016 compared to the same periods previous year

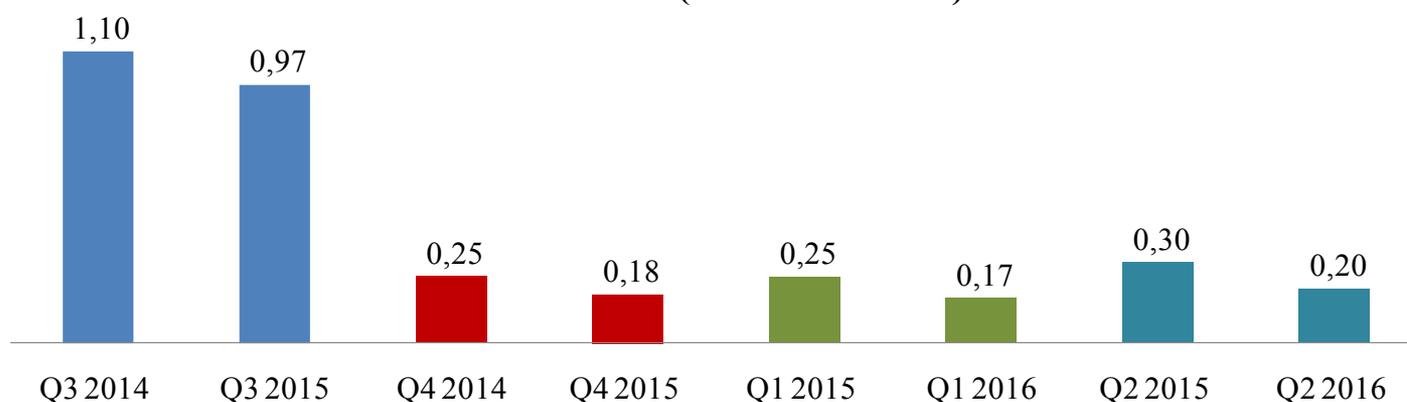
# Retail roaming SMS

Number of SMS (millions)



**Number of SMS** decreased by 13,4% in Q3 2015, 5,9% in Q4 2015, 8,8% in Q1 2016 and 5,8% in Q2 2016 compared to the same periods previous year

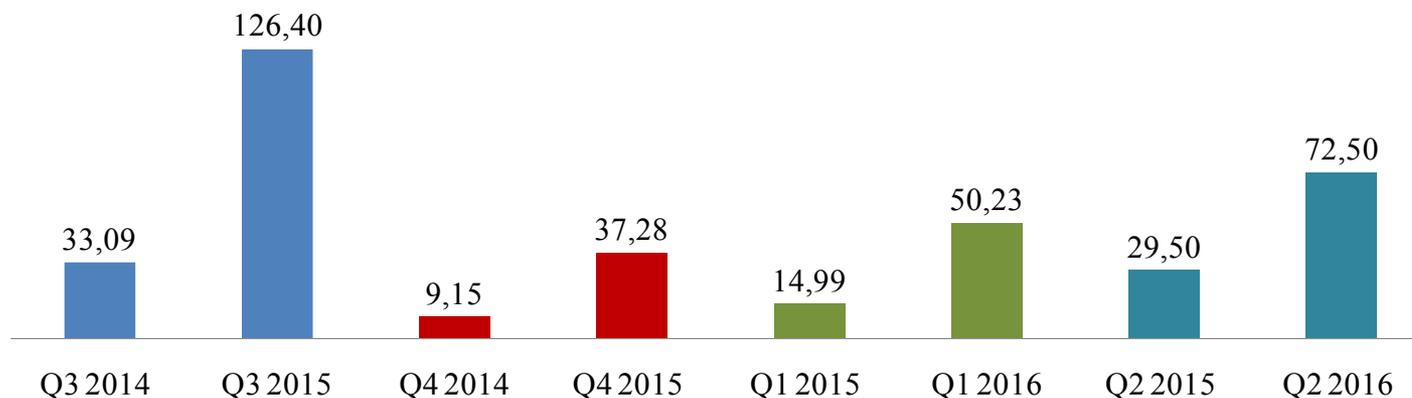
SMS income (millions of euros)



**SMS income** decreased by 11,8% in Q3 2015, 28% in Q4 2015, 32% in Q1 2016 and 33,3% in Q2 2016 compared to the same periods previous year

# Retail roaming Data

## Data (TB) - prepaid + postpaid



**Data traffic** increased by 282% in Q3 2015, 307,4% in Q4 2015, 235,1% in Q1 2016 and 145,8% in Q2 2016 compared to the same periods previous year

## Data income (millions of euros)



**Data income** increased by 25,6% in Q3 2015 and decreased by 21,1% in Q4 2015, 30% in Q1 2016 and 2,8% in Q2 2016 compared to the same periods previous year

## Wholesale - Roaming traffic (calls, SMS and data) and income generated by roamers from Bosnia and Herzegovina, Macedonia and Montenegro

- On annual level, **Calls** traffic increased more compared to increase in income which leads to conclusion that average wholesale price for calls decreased.
- Number of **SMS** decreased less compared to income decrease which leads to conclusion that average wholesale SMS price decreased.
- Increase in **Data** traffic followed by income decrease shows that average price for this service decreased.

## Wholesale - Roaming traffic (calls, SMS and data) and costs generated from Serbian subscribers visiting Bosnia and Herzegovina, Macedonia, and Montenegro

- Increase in minutes of **Calls** followed by slower increase in costs leads to conclusion that average wholesale price for calls decreased.
- Costs for **SMS** services decreased more compared to decrease in number of SMS and shows decrease in average price for this service.
- **Data** traffic increased more compared to costs which leads to conclusion that there was decrease in average price for this service.

**Thank you for your attention!**

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