

OVERVIEW OF BROADBAND ACCESS IN MONTENEGRO

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OPERATORS

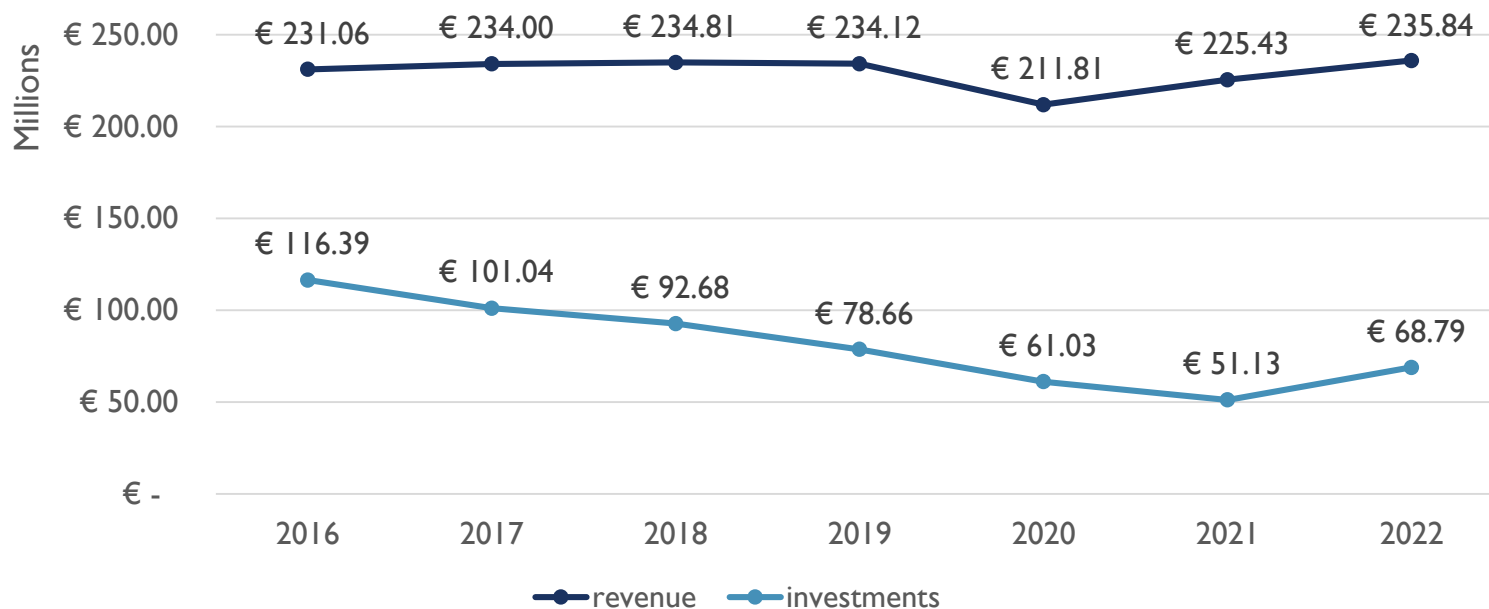
❑ 36 registered operators in Montenegro

- 4 – fixed telephony operators
- 3 – mobile telephony operators
- 12 – ISP
- 5 – AVM operators

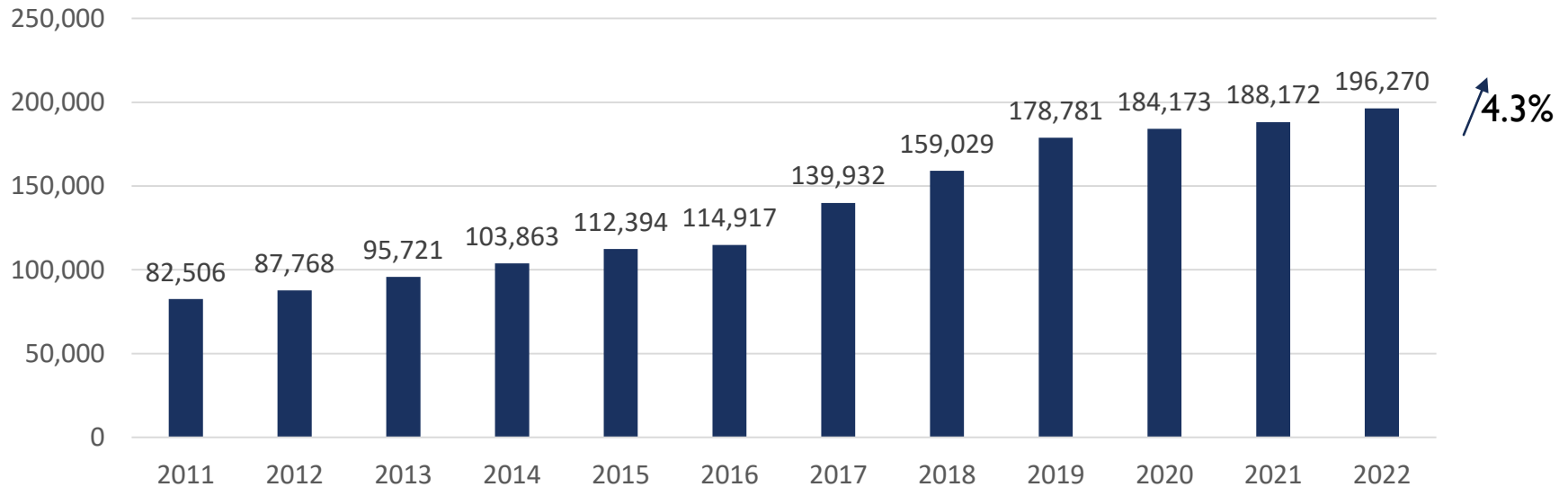
❑ Sector revenue and investments

- During a seven-year period – from 2016 till 2022, percentage of investments ~ 35% of sector revenue
- This led to significant development of networks and an increase in BB connections

REVENUE AND INVESTMENTS

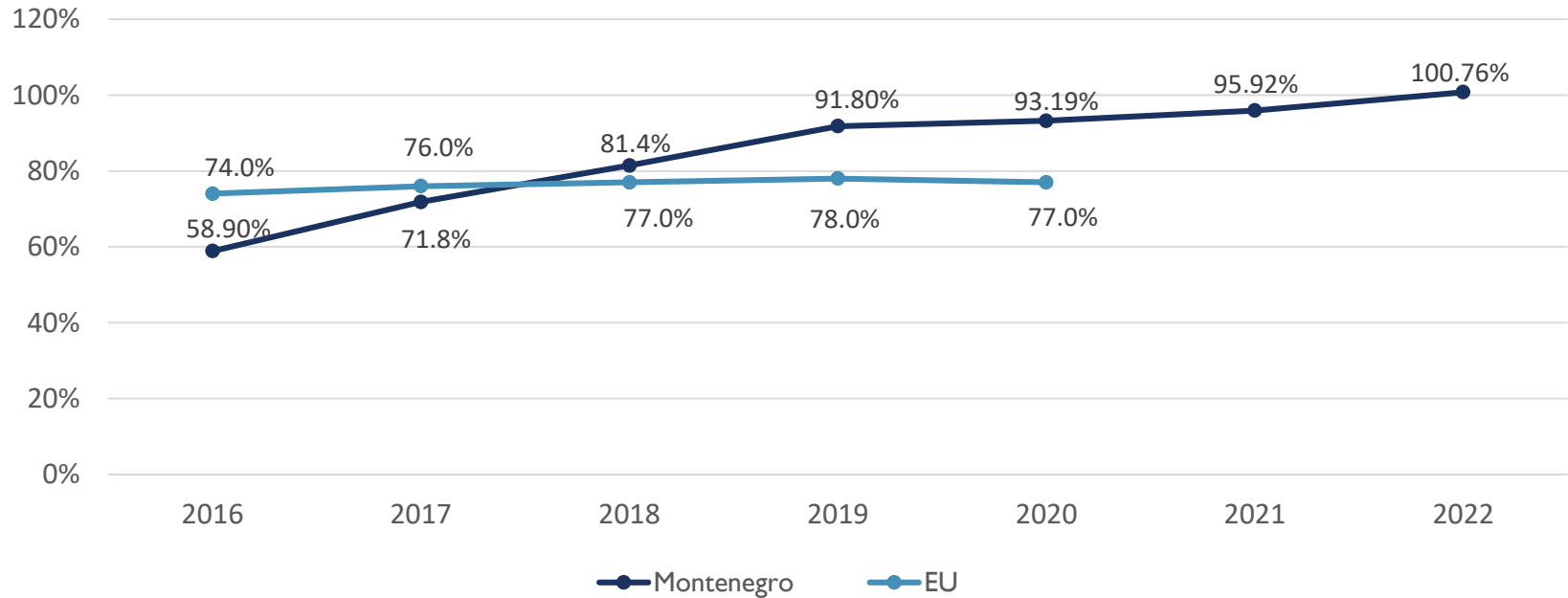


FIXED BROADBAND ACCESS – subscribers



Number of households in Montenegro ~ 195K

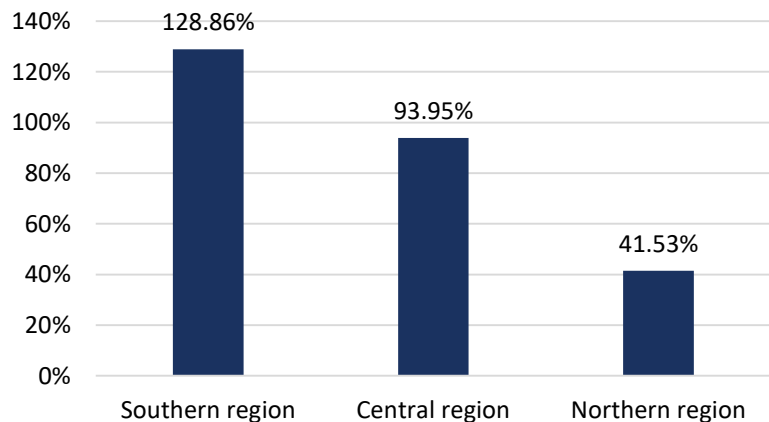
FIXED BROADBAND ACCESS – penetration (households)



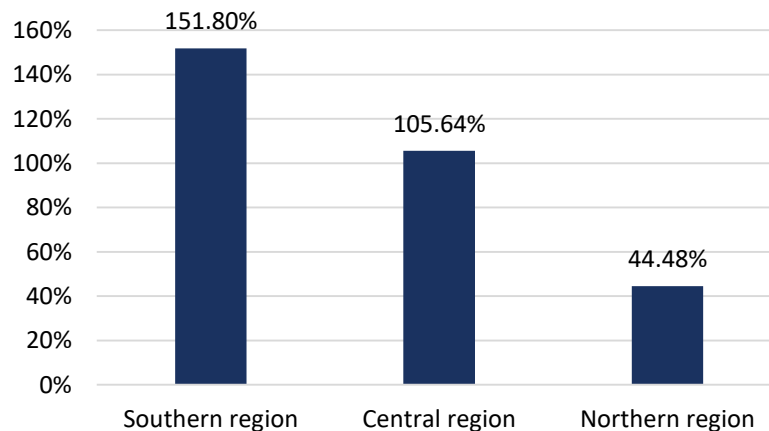
Source: Eurostat, Community Survey on ICT usage in Households and by Individuals

FIXED BROADBAND ACCESS – penetration by region (households)

2021



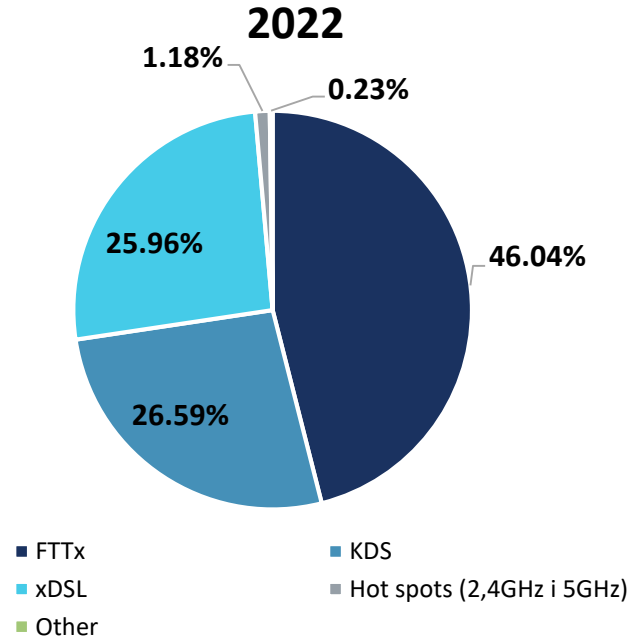
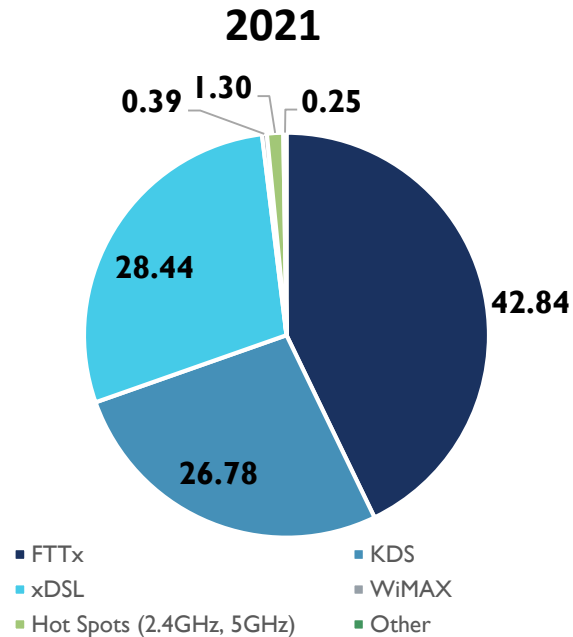
2022



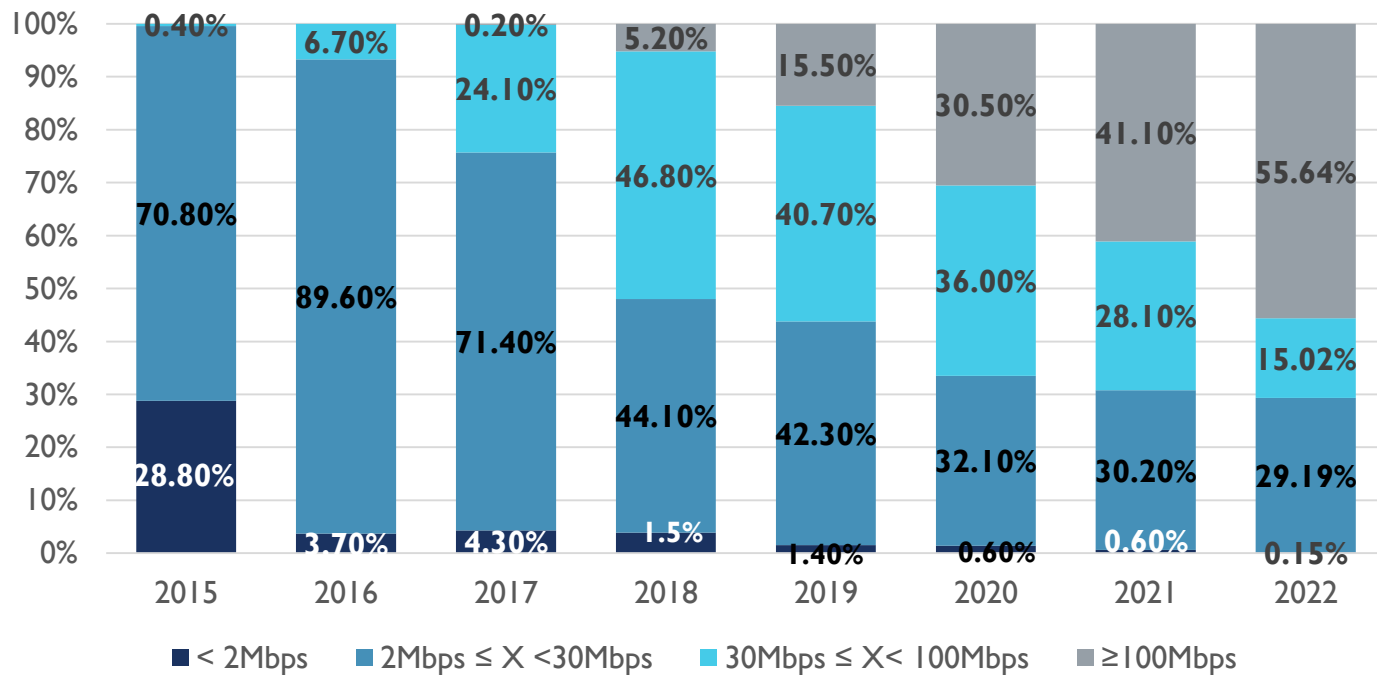
Geographical distribution 2022:

- 1 municipality (Plav): 1 operator (1.46% of the population)
- 3 municipalities (Gusinje, Petnjica and Šavnik): 2 operators (1.87% of the population)
- 20 municipalities: ≥ 3 operators (97.67% of the population)

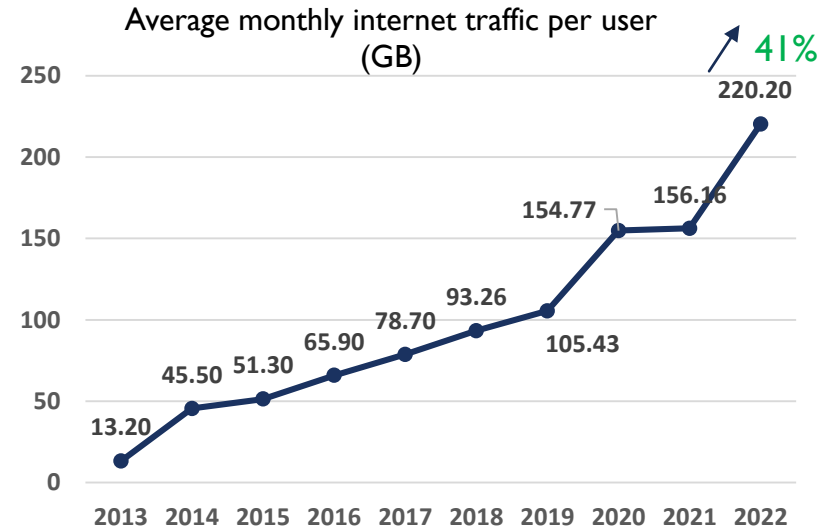
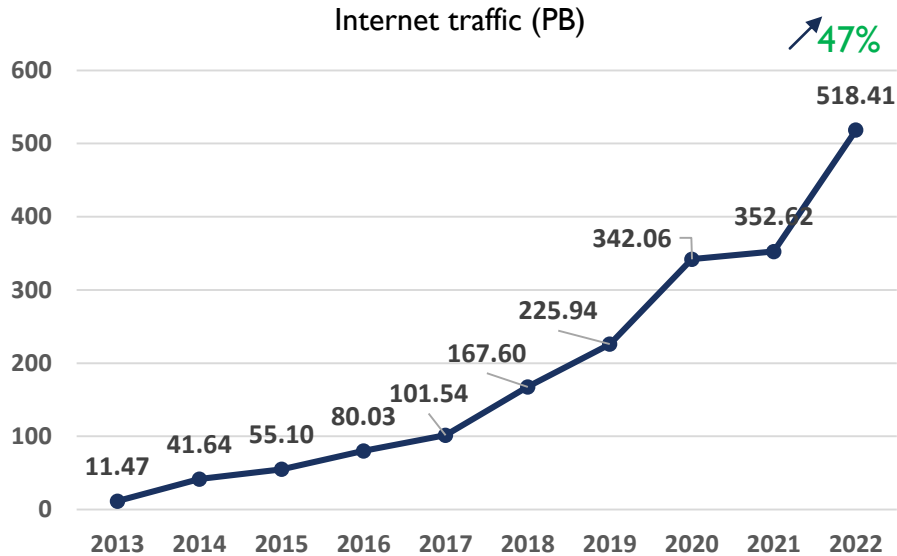
FIXED BROADBAND ACCESS – subscribers structure by technology



FIXED BROADBAND ACCESS – subscribers structure by speed

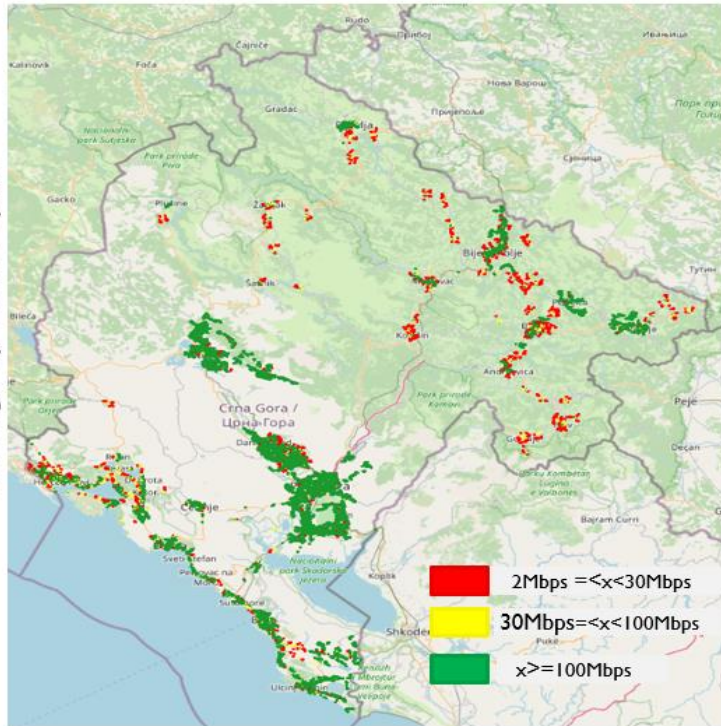


FIXED BROADBAND ACCESS – internet traffic

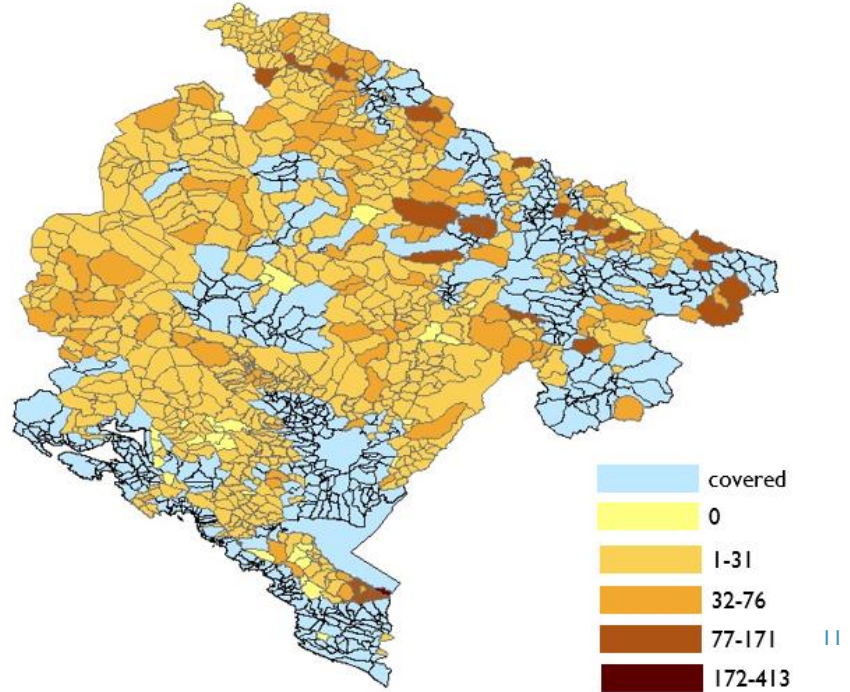


FIXED BROADBAND ACCESS – mapping results

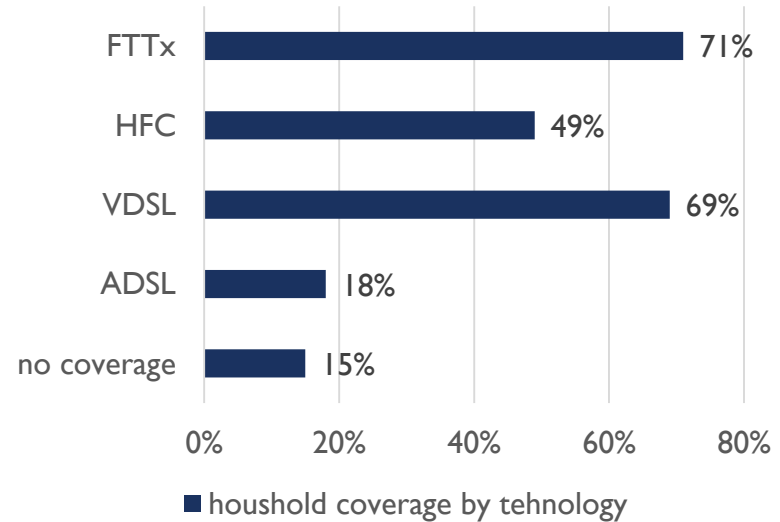
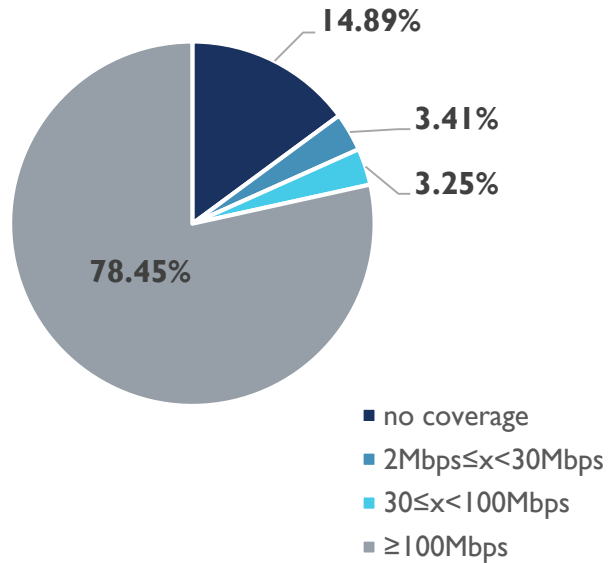
coverage by access speed



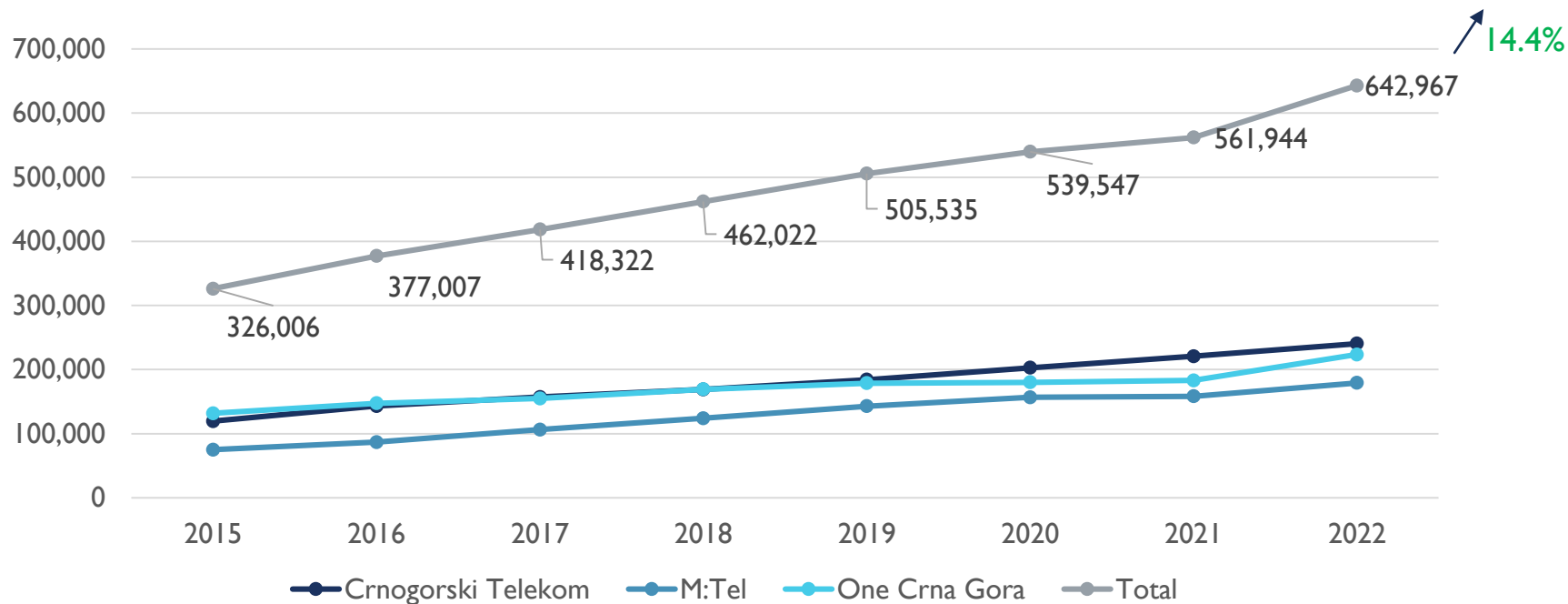
coverage by settlements



FIXED BROADBAND ACCESS – household coverage by speed and by technology



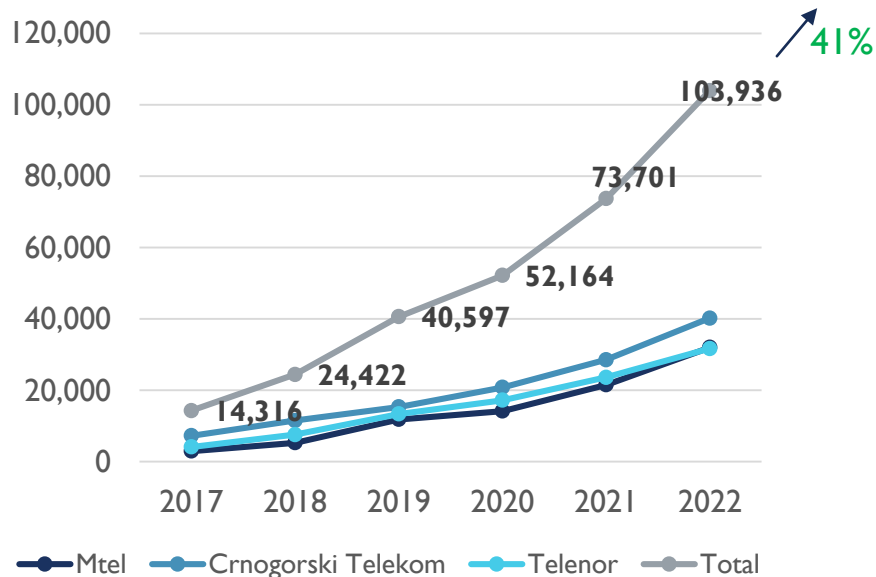
MOBILE BROADBAND – mobile internet users



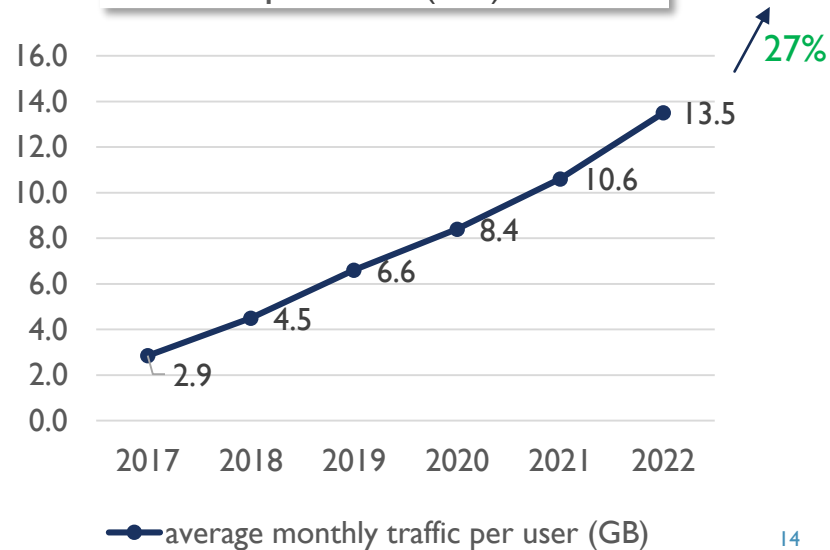
Population in Montenegro ~ 625K

MOBILE BROADBAND – internet traffic

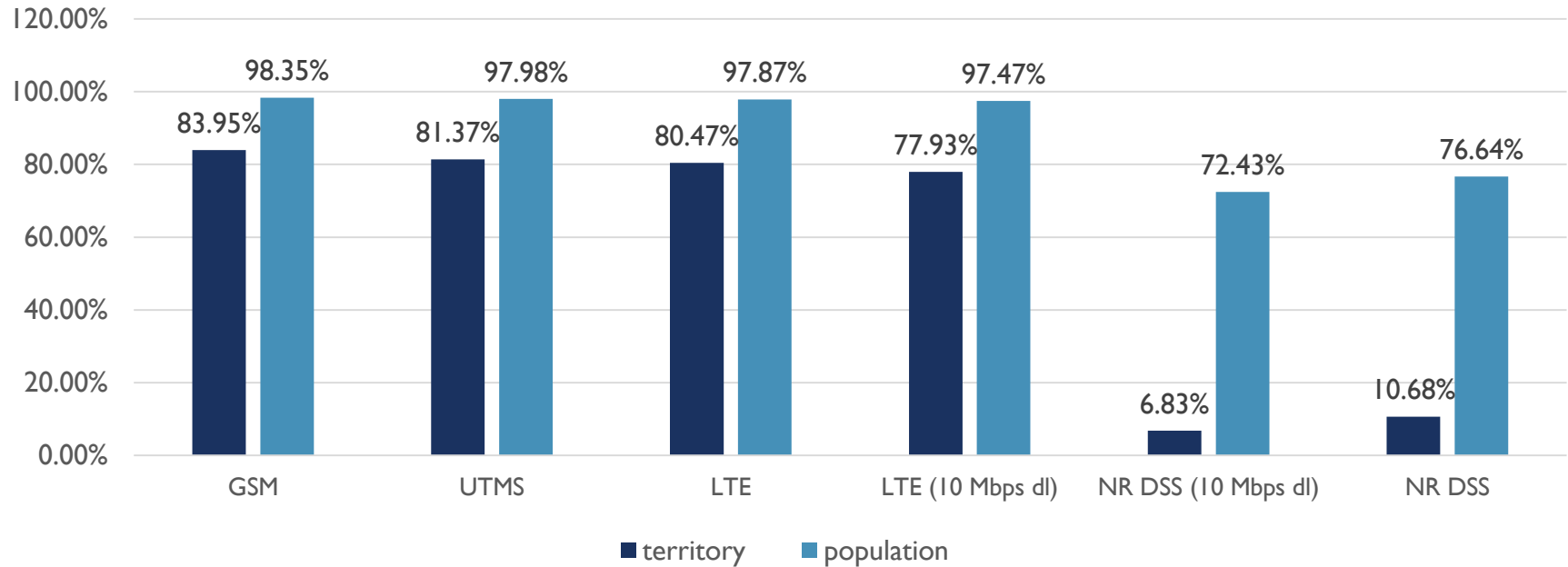
Mobile internet traffic (TB)



Average monthly internet traffic per user (GB)



MOBILE BROADBAND – coverage



DIGITAL TRANSFORMATION STRATEGY OF MONTENEGRO 2022 – 2026

Increased coverage and modernization of electronic communications infrastructure

Indicator	Initial value 2021	Target value until 2024	Target value until 2026
Proportion of citizens using the Internet	82.2%	86%	89%
Percentage of household coverage with fixed BB at the rate of 100Mbps +	76.7%	81.6%	86.4%
Percentage of population coverage by mobile BB at a speed of 10 Mbps +	97.2%	98%	99%

THANK YOU FOR YOUR ATTENTION!



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