

REGULATORY AUTHORITY OF ELECTRONIC AND POSTAL COMMUNICATIONS (ARKEP)

On October 12-th, 2012, the Assembly of the Republic of Kosovo approved the law "On Electronic Communications" No. 04/L-109, which repeals the Law on Telecommunications No. 2002/7. The law was decreed by the Decree of the President of the Republic No. DL-047-2012, dated October 25-th, 2012, which was published in the Official Gazette with No. 30 of November 9, 2012 and entered into force 15 (fifteen) days after its publication.

ARKEP is the regulatory authority which implements and supervises the regulatory framework, defined by the Law on Electronic Communications and the Law on Postal Services as well as by the development policies of the field of telecommunications respectively electronic communications and postal services, determined by the Government of the Republic of Kosovo.

ARKEP has started activity in 2004 with the aim of regulatory, developing and liberalizing telecommunication and postal services sector in Republic of Kosovo.



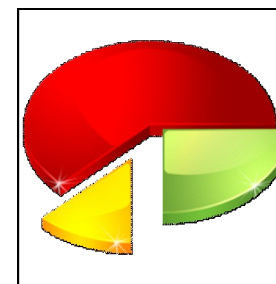
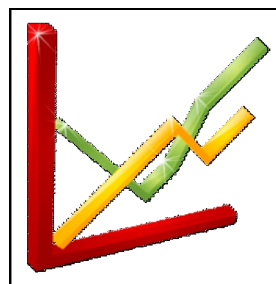
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DEPARTMENT FOR ECONOMIC REGULATION OF MARKET

SUMMARY OF THE MAIN INDICATORS OF ELECTRONIC COMMUNICATIONS
“ AN OVERVIEW OF ELECTRONIC COMMUNICATIONS MARKET” FOR Q4 2023



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MAIN INDICATORS OF ELECTRONIC COMMUNICATIONS

The Regulatory Authority of Electronic and Postal Communications (ARKEP) after updating the data received from entrepreneurs of electronic communications networks and/or services for electronic communications, publishes the report "Overview of the Electronic Communications Market", which includes the performance of the main market indicators for the fourth quarter of 2023 (Q4- 2023).

No.	Description	Q4-2023	Q3-2023	Q4-2022	Changes Q4 2023– Q3 2023 (%)	Changes Q4 2023– Q4 2022(%)
1.1	The number of fixed line users	66,993	67,287	71,346	▼ 0.4%	▼ 6.1%
1.2	Penetrations of fixed line (%) per pop	3.69	3.71	3.93	▼ 0.5%	▼ 6.1%
1.3	Penetration of fixed line (%) per household	22.55	22.65	24.01	▼ 0.4%	▼ 6.1%
2	The number of mobile line users	1,941,815	2,034,002	1,783,419	▼ 5.9%	▲ 7.4%
2.1	Penetration of mobile line (%)	107.0	112.0	98.23	▼ 0.4%	▲ 8.9%
3	Number of internet users– fixed line	385,663	399,132	383,834	▼ 3.4%	▲ 0.5%
3.1	Penetration of Internet services (%) per resident	21.2	22.0	21.1	▼ 3.6%	▲ 0.5%
3.2.	Penetration of Internet services(%) per household	129.3	134.3	129.2	▼ 3.7%	▲ 0.1%
4	Number of internet users–mobile line	1,598,043	1,734,558	1,548,183	▼ 7.9%	▲ 3.2%
5	Incoming (€)	42,718,648	49,733,295	37,956,997	▼ 14.1%	▲ 12.5%
5.1	Landline telephony	911,606	821,446.1	1,093,508	▲ 11.0%	▼ 16.6%
5.2	Mobile telephony	29,696,310	36,681,700	25,925,340	▼ 19.0%	▲ 14.5%
5.2.1	ARPU (€)	5.10	6.27	4.85	▼ 18.7%	▲ 5.2%
5.3	Lines with rent	252,507	214,031	225,188	▲ 18.0%	▲ 12.1%
5.4	Interneti	11,858,225	12,016,118	10,712,961	▼ 1.3%	▲ 10.7%
6	Investments (€)	5,975,160	9,493,342	11,064,352	▼ 37.1%	▼ 46.0%

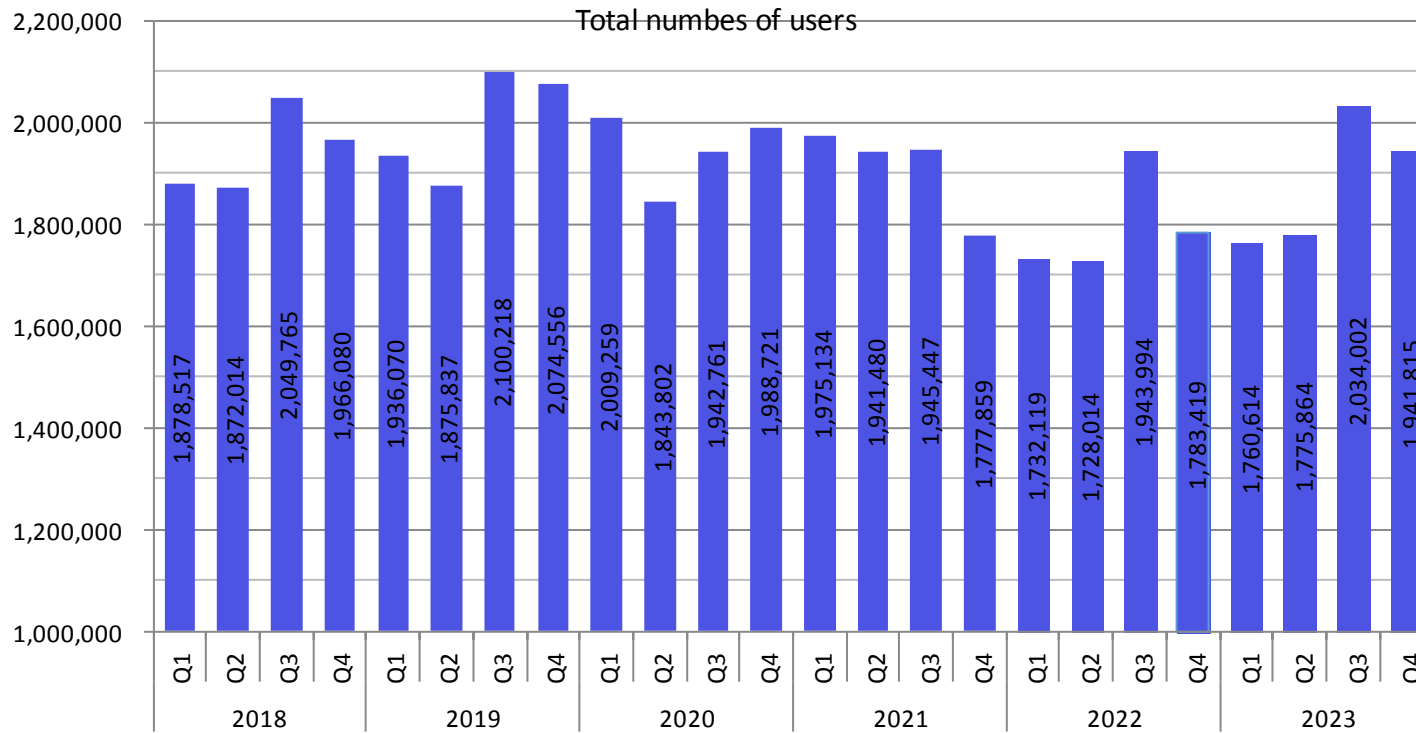
The population estimate for 2012 is 1815606 while the housing estimate is 297,090.

Taken from: Kosovo Statistics Agency. <<http://esk.rks-gov.net/rekos2011/?cid=1,1>> *

Total 125,067 numbers (Sim Cards) used only for data transmission services , through the mobile network (GPRA/EDGE) which are not presented in table.

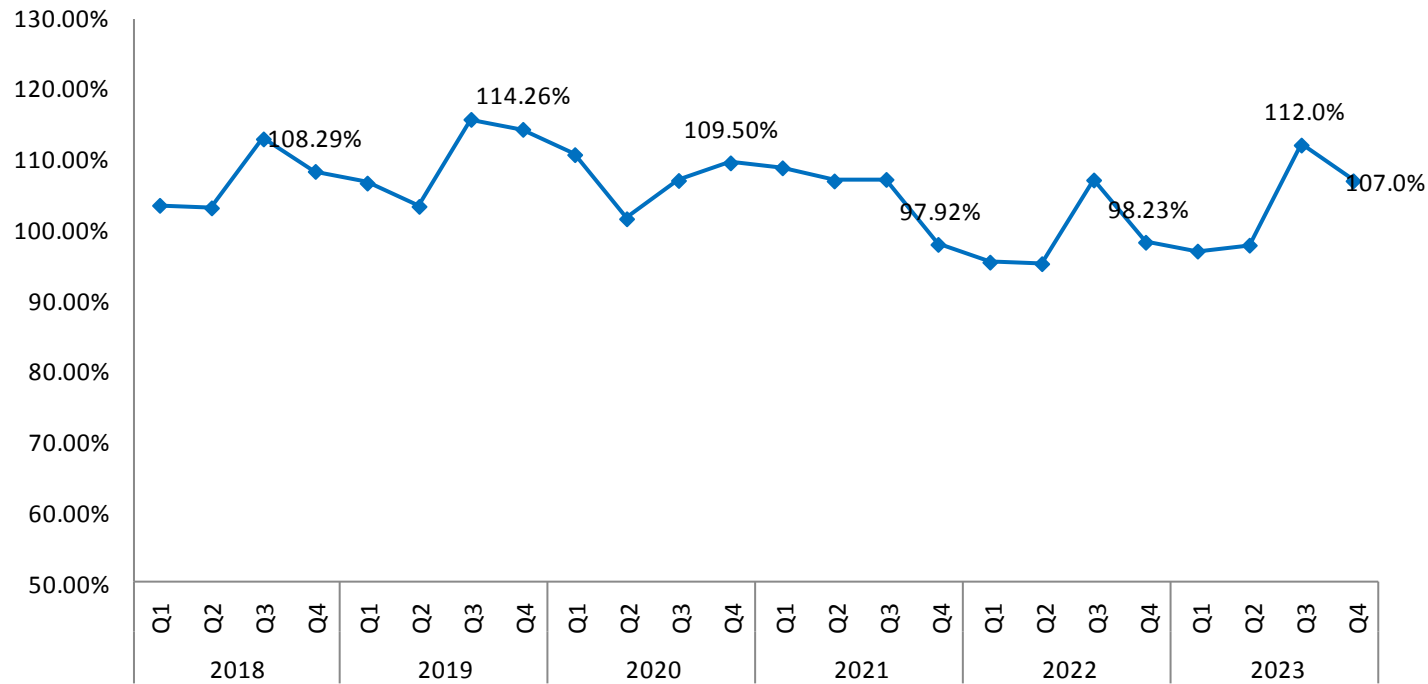
MOBILE TELEPHONY

The total number of mobile phone users at the end of the third quarter (Q4-2023) is 1,941,815, respectively 4.53% lower compared to the previous quarter Q3-2023, while 8.9% higher than in the same period of last year (Q4-2022) .



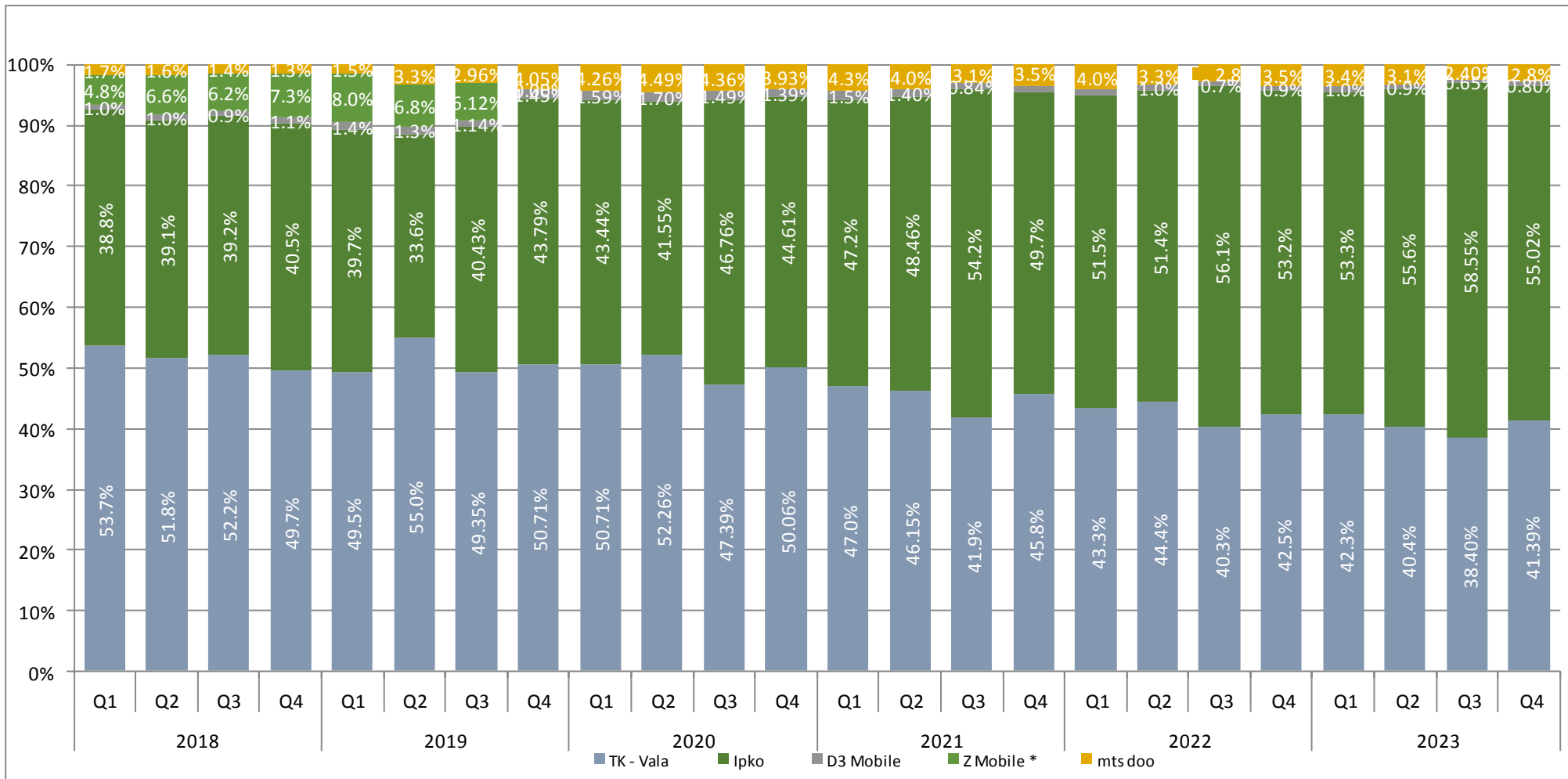
MOBILE TELEPHONY - Penetration

Similar to the number of users, the penetration of mobile phone services in the reporting period is approximately the same as the previous quarter, while compared to the same quarter last year (Q4 2022) there is an increase of 8.7 percentage points. Penetration of mobile phone services is now at the level of 107.0% of the population.



MOBILE TELEPHONY - Market share(1)

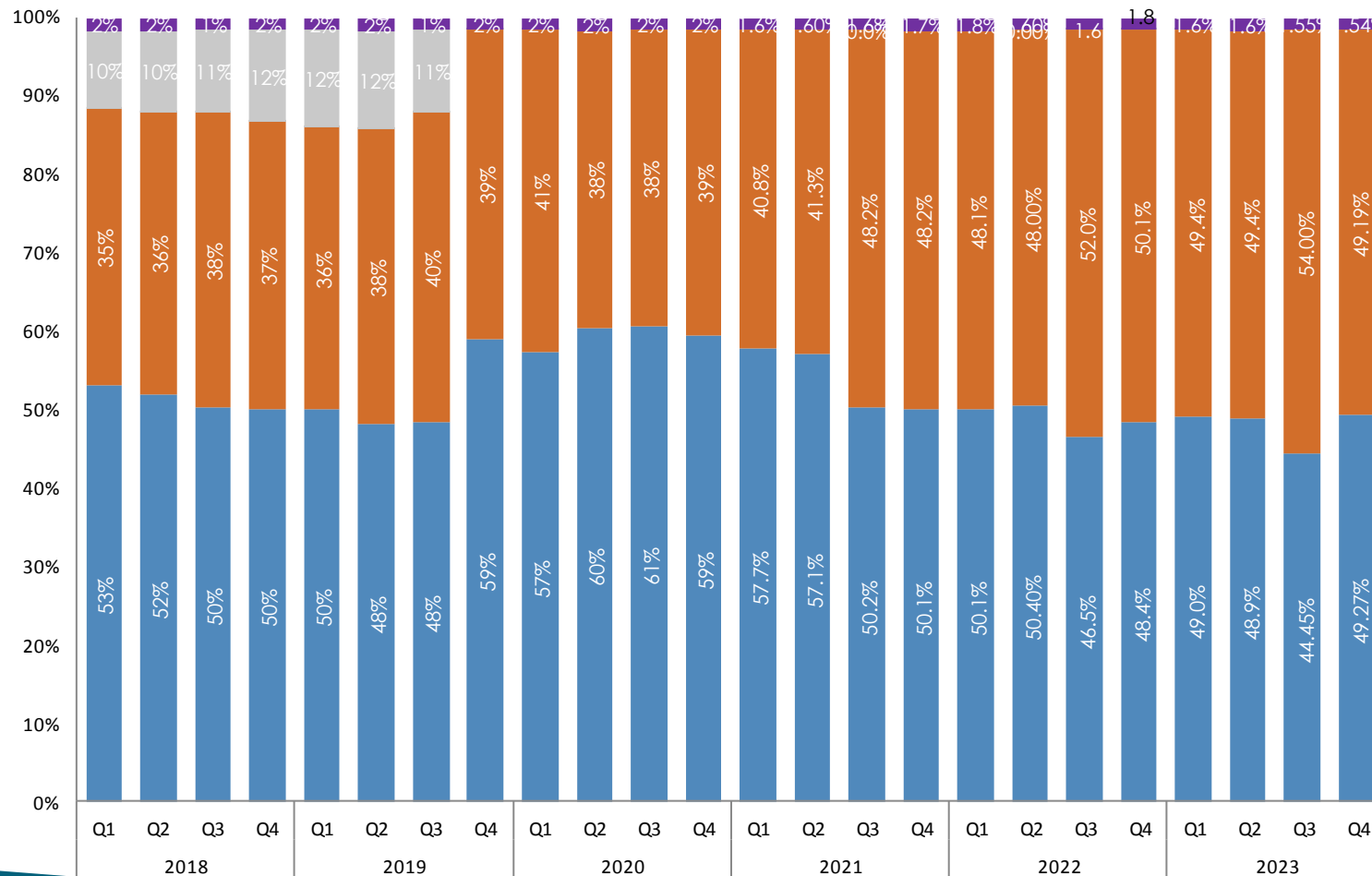
Mobile phone market share by revenue from Q1-2018 to Q4 2023



* Z Mobile does not operate from TM4 2019

MOBILE TELEPHONY- Market share (2)

Mobile phone market share by users from Q1-2018 to Q4-2023



* Z Mobile does not operate from TM4 2019

MOBILE TELEPHONY - Traffic indicators

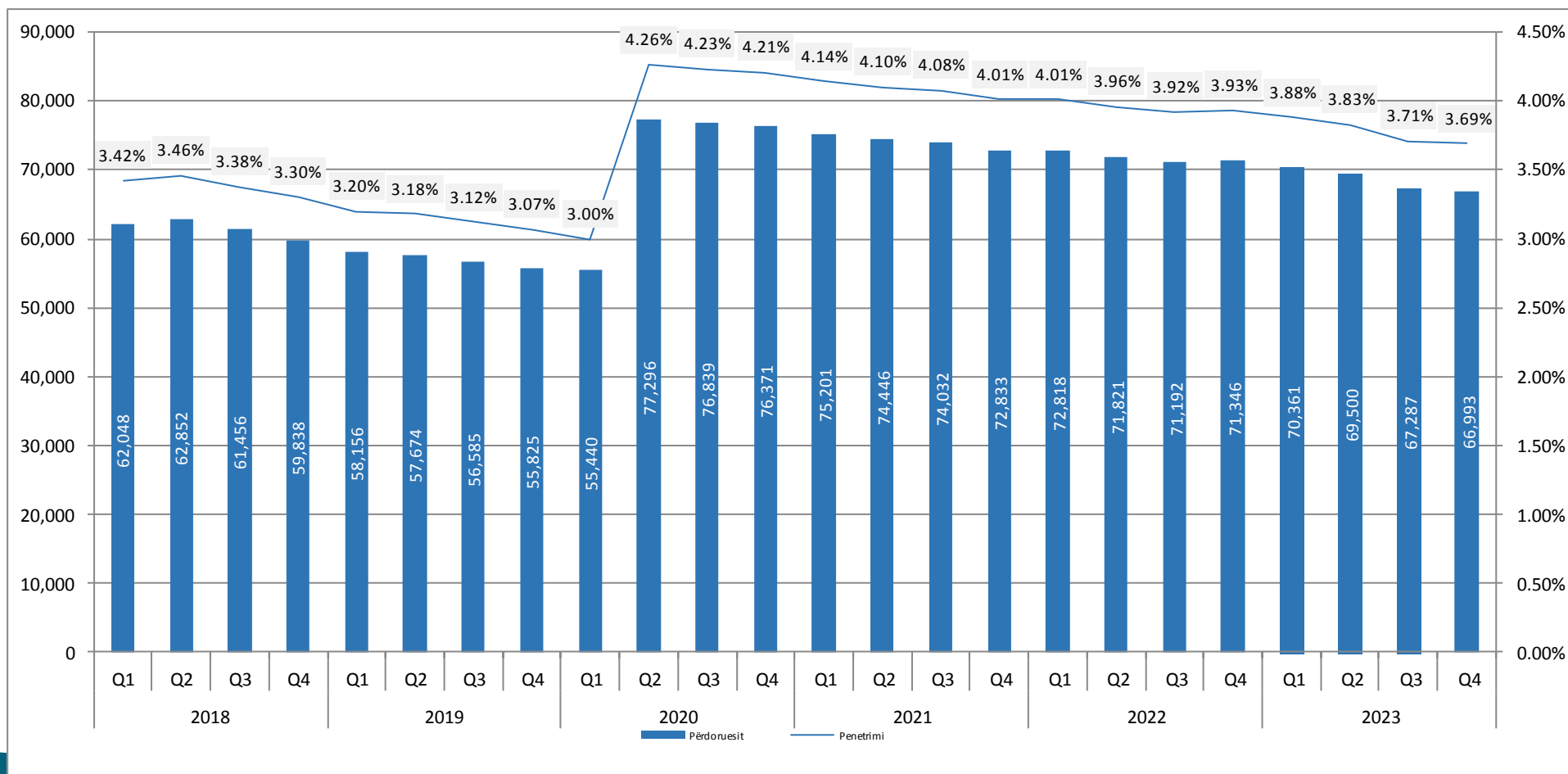
Mobile phone traffic indicators in '000 min. (originated and terminated)

Nr.	Description	Q4 2023	Q3- 2023	Q4 2022	Changes Q42023–Q32023 (%)	Changes Q4 2023– Q4 2022 (%)
1.	Traffic origination from the MNO	299,957	369,216	355,916	▼18.8 %	▼15.7%
1.1	<i>within the network (on-net)</i>	203,723	254,453	249,564	▼19.9 %	▼18.4%
1.2	<i>to another mobile network (mobil off-net)</i>	82,000	101,140	90,902	▼18.9 %	▼9.8 %
1.3	<i>towards the fixed network</i>	2,489	1,853	2,606	▲34.3 %	▼4.5 %
1.4	<i>towards the intrnational network</i>	11,745	11,757	12,831	▼0.1 %	▼8.5 %

Nr.	Description	Q4- 2023	Q3- 2023	Q4 2022	Changes Q4 2023–Q3 2023 (%)	Changes Q4 2023 – Q4 2022 (%)
2.	Total traffic terminated	112,681	123,527	109,026	▼8.8 %	▲3.4 %
2.1	<i>from another mobile network (mobil off-net)</i>	96,590	105,085	92,816	▼8.1 %	▲4.1%
2.2.	<i>from fix network</i>	2,721	2,788	2,895	▼2.4 %	▼6.0 %
2.3.	<i>from international network</i>	13,370	15,654	13,315	▼14.6 %	▲0.4%

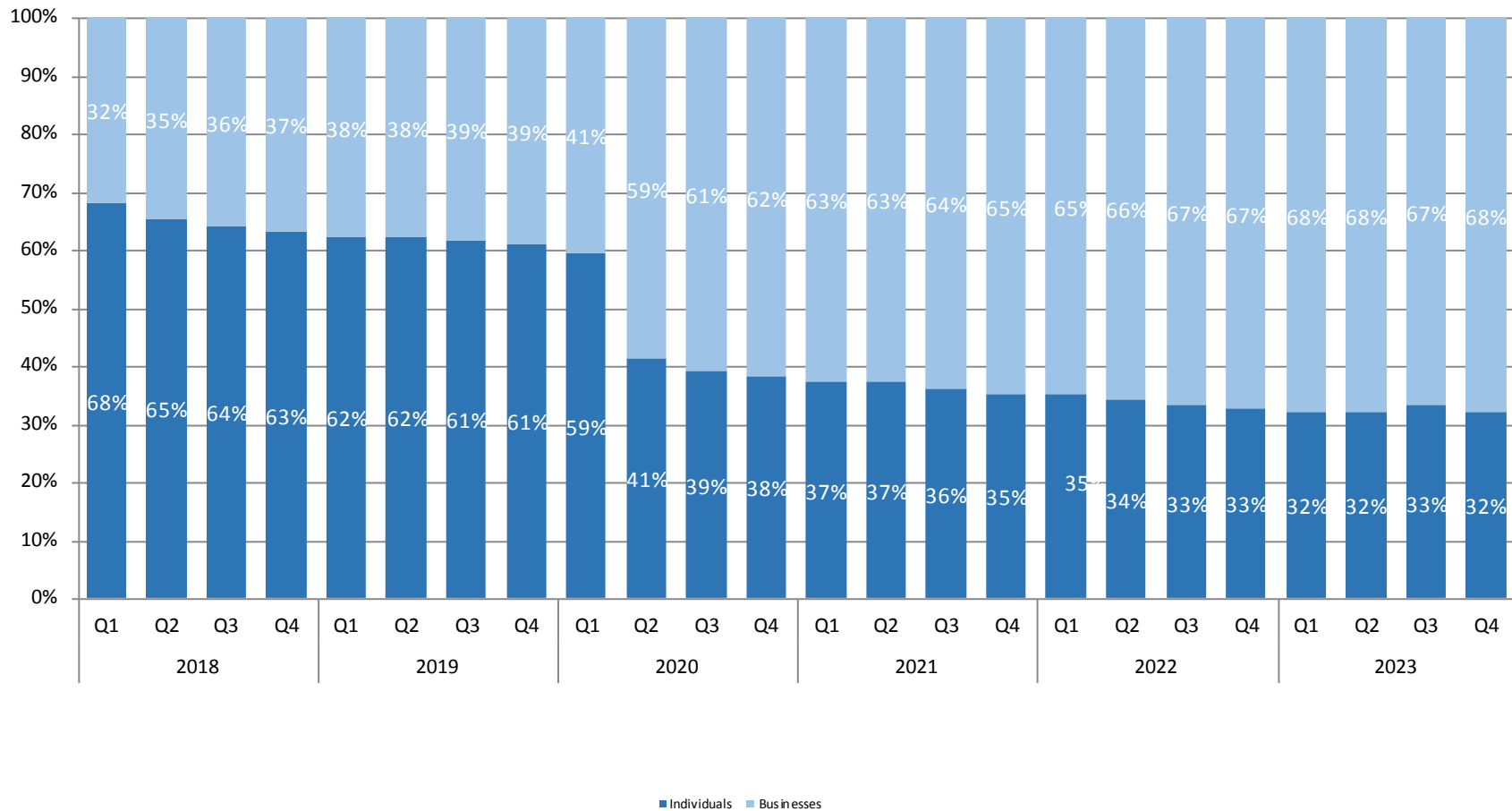
FIXED TELEPHONY

In the period of Q4 2023 the number of fixed telephony subscribers is 66,993, which represents a decrease of 0.4% compared to the previous period. The penetration rate of fixed telephony in Kosovo in this period is 3.69%.



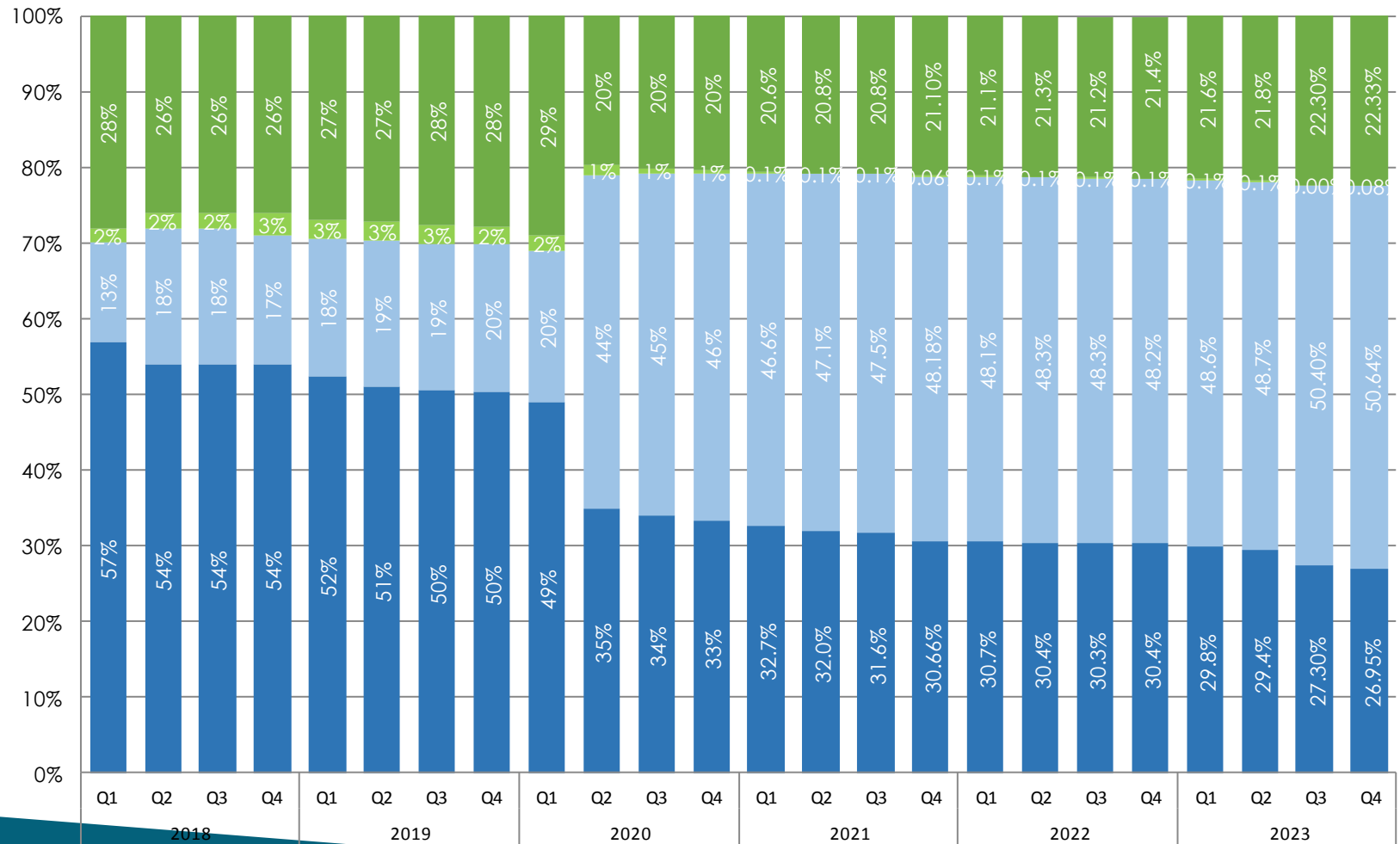
FIXED TELEPHONY

The division of landline users into individuals and businesses for the period Q1 2018 to Q4 2023 is shown in the figure below. From the data in the figure, it can be observed that the structure of landline prepaid subscribers is in the ratio between individual prepaid subscribers and business prepaid subscribers 32% - 68%



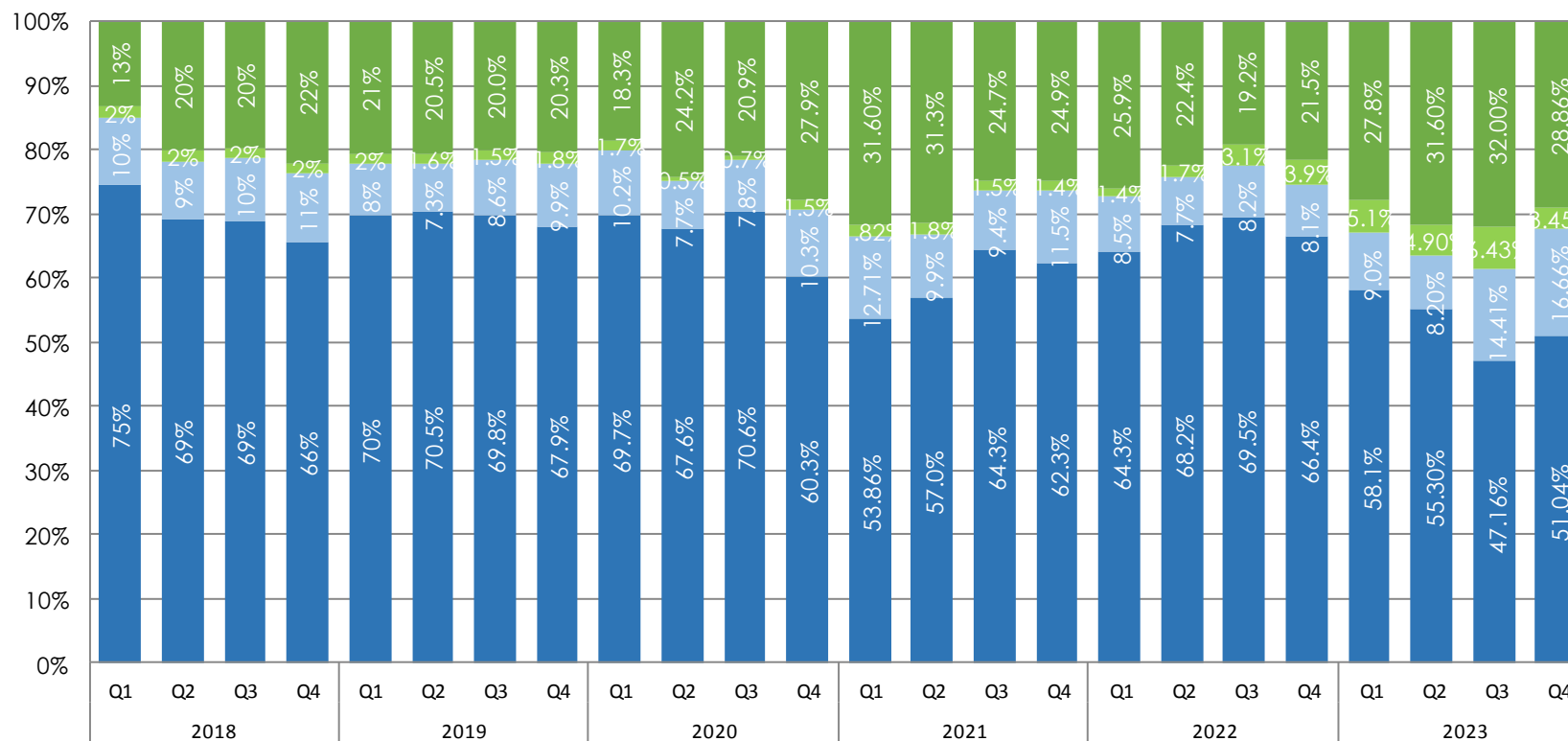
FIXED TELEPHONY – Market share(1)

Fixed telephony market share by users in percentage, for the period: Q1 2018 to Q4 2023.



FIXED TELEPHONE - Market share (2)

Market share by revenue in percentage for the period: Q1 2018 to Q4 2023



■ Telekomi i Kosovës ■ Ipko ■ Kujtesa.Net ■ mts doo

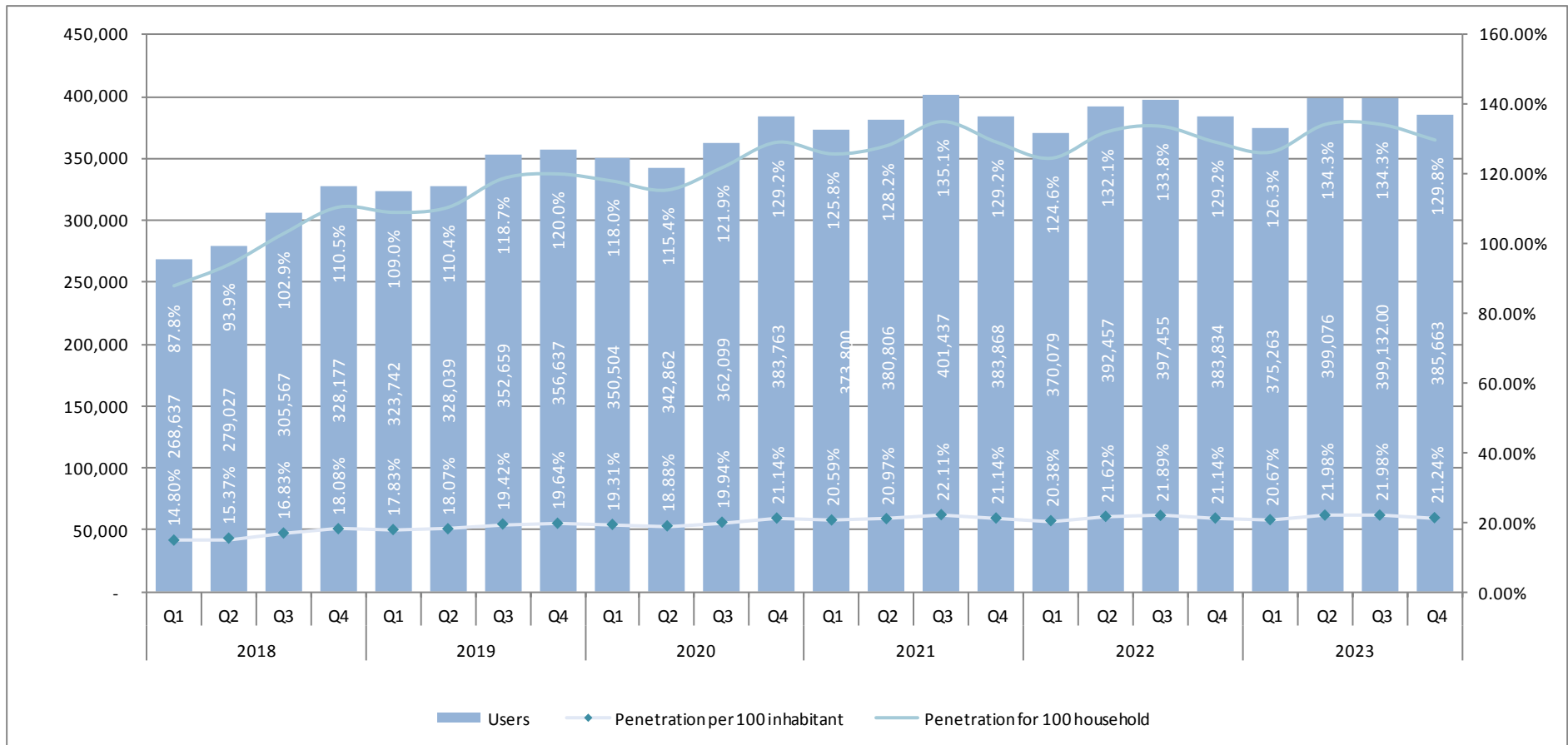
FIXED TELEPHONE- *Traffic indicators*

Fixed line traffic indicators in min. (originated and terminated) for Q4 2023.

NR.	DESCRIPTION	Q4- 2023	Q3- 2023	Q4- 2022	CHANGES	CHANGES
					Q4 2023–Q3 2023 (%)	Q4 2023– Q4 2022 (%)
LANDLINE TELEPHONE						
1	Originating and terminating calls in own network (<i>On net Calls</i>)	1,640,801	1,892,001	2,043,110	▼13.3%	▼19.7%
2	Originating calls to other fixed networks (<i>outgoing calls</i>)	118,883	162,941	143,210	▼27.0%	▼17.0%
3	Originating calls to mobile networks (<i>Fixed to Mobile outgoing calls</i>)	3,981,188	3,673,846.2	3,590,368	▲8.4%	▲10.9%
4	<i>International outgoing calls</i>	613,109	644,331	782,362	▼4.9%	▼21.6%
Nr.	DESCRIPTION	Q4- 2023	Q3- 2023	Q4-2022	CHANGES	CHANGES
					Q4 2023–Q3 2023 (%)	Q-42023–Q4-2022 (%)
1	Call termination from other fixed networks (<i>incoming off net</i>)	31,512	34,372	38,604	▼8.3%	▼18.4%
2	Termination of calls from mobile networks (<i>Mobile to Fixed incoming</i>)	3,288,241	3,988,972	3,391,663	▼17.6%	▼3.1%
3	Call termination from international networks(<i>International incoming</i>)	1,816,342	1,855,455		▼2.1%	▼17.2%

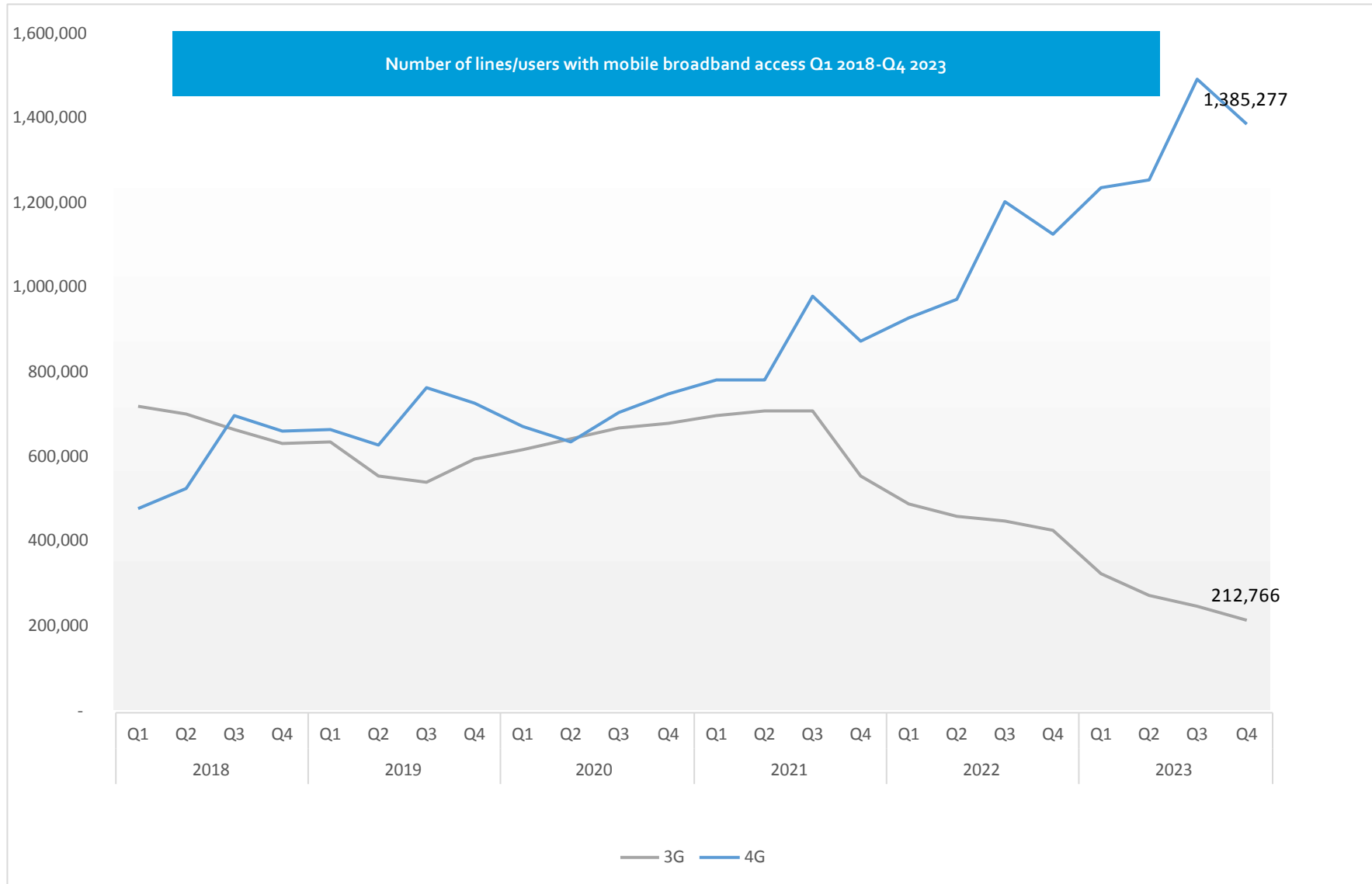
INTERNET - fixed access

The number of internet lines with fixed broadband access until Q4 2023 reported by operators is given in the figure below and marks the level of 385,663 internet subscribers. This shows a decrease of 3.37% compared to Q3 2023, respectively an increase of 0.47% compared to Q4 2022. Meanwhile, internet penetration through fixed broadband access to the internet for households is 129.3%, respectively internet penetration according to residents (per 100 inhabitants) turns out to be 21.24%



INTERNET - Mobile access

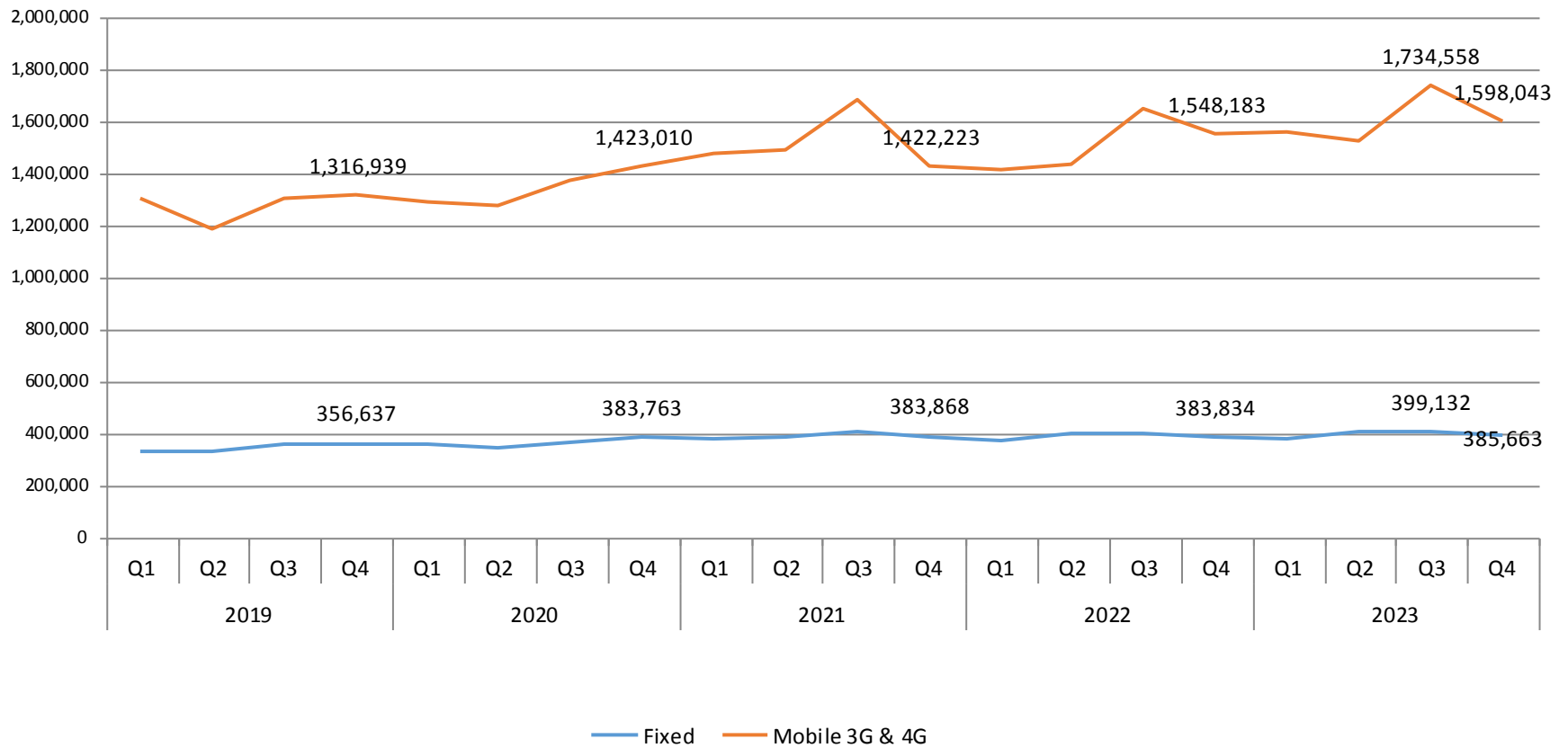
The number of users of mobile Internet services (Mobile Broadband) or Internet access through the 3G and 4G mobile network in Q4 2023 has reached 1,598,043 users, which marks a decrease of 7.9% compared to Q3 2023, and an increase of 3.2% compared to Q4 2022. Below is the figure that presents the comparison of users with 3G and 4G access.



INTERNET - Mobile access

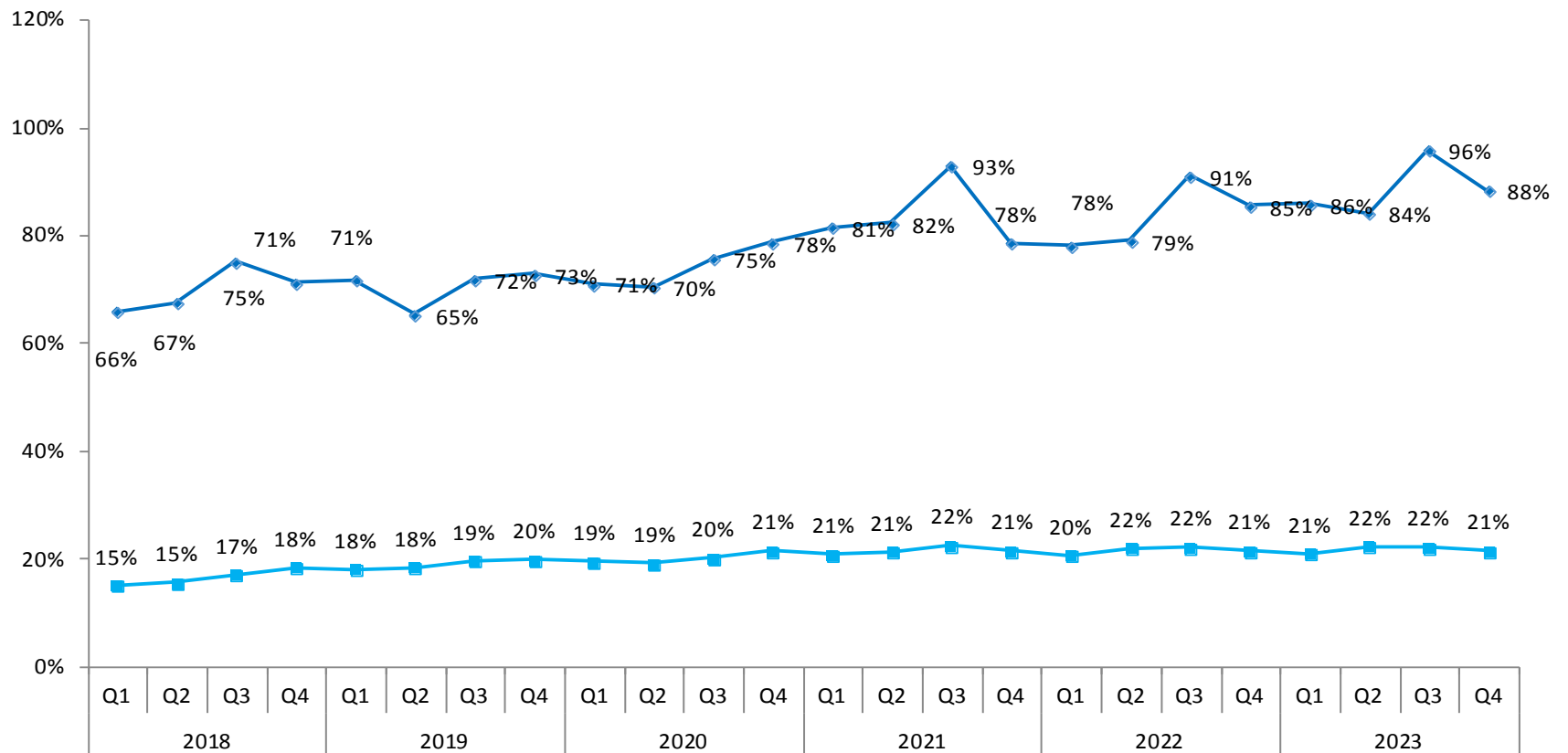
Below is the figure that presents the comparison of lines/users with fixed access and with mobile access to the Internet.

Number of lines/users with fixed and mobile broadband access Q1 2019-Q4 2023



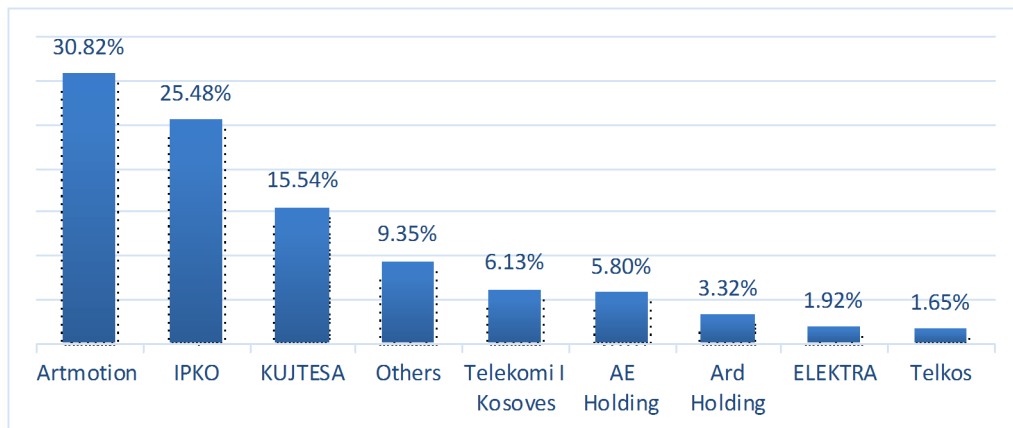
INTERNET - Penetration of fixed and mobile access

The trend of the number of subscribers to internet access through the mobile network since the beginning of the provision of these services in the market has been characterized by a continuous increase. In the reporting period (Q4 2023), the penetration of mobile access is 88%, while that of fixed access is 21% per inhabitant.

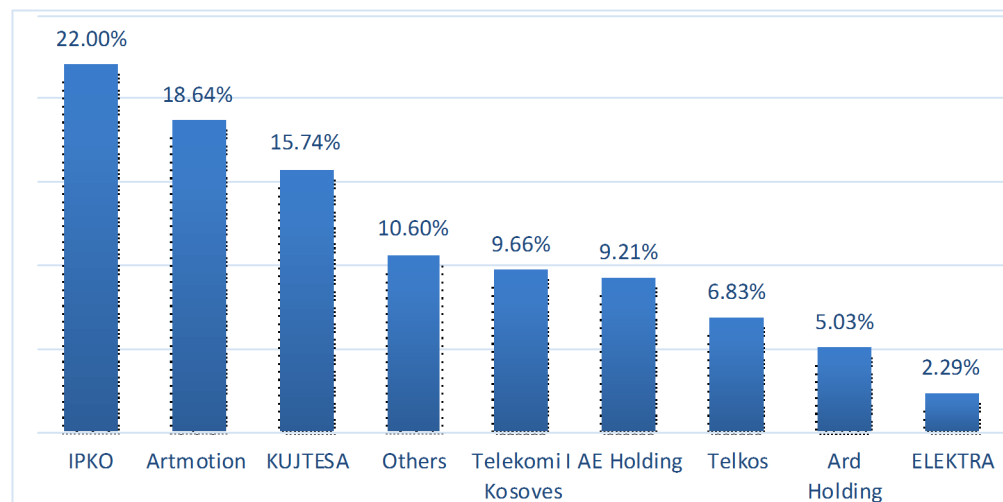


FIXED BROADBAND INTERNET - Market share

Market share (in %) by users per operator



Market share (in %) by revenue s per operator



FIXED BROADBAND INTERNET - Market share of other operators by revenue and users

No.	Operator name	Participation in the market according to		No.	Operator name	Participation in the market according to	
		Revenue (%)	Users (%)			Revenue (%)	Users(%)
1	FIDAN ABAZI	0.03	0.01	18	Sky Net	0.67	0.41
2	Kosova Online	0.06	0.04	19	vala net	0.01	0.02
3	COM net B	0.05	0.03	20	Vista	1.28	1.31
4	ATM Fiber SHPK	0.19	0.22	21	ITS	0.03	0.01
5	NET PLUS	0.29	0.26	22	Laura Halili B.I	0.03	0.04
6	Galaktika	0.28	0.25	23	NEGENET	0.06	0.04
7	Herc international	0.33	0.49	24	Tech Expert SHPK	0.10	0.08
8	ISP Broadcast	0.20	0.29	25	Valnet SHPK	0.08	0.07
9	Joni Group	0.09	0.11	26	Rrahime Mazreku B.I	0.01	0.02
10	Kadria Net	1.42	0.65	27	P.P Progres	0.06	0.09
11	Tel Communications	1.66	1.55	28	INFO Network SHPK	0.02	0.01
12	Optimum Telecommunications	0.15	0.13	29			
13	VGN NET	0.29	0.43	30			
14	Max tv	1.92	0.54	31			
15	MTS doo	2.01	1.74	32			
16	KIKI NET shpk	0.14	0.13	33			
17	Niarti	0.15	0.37	34			