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2013 Report on e-communications and information society in Enlargement countries

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Monitoring regulatory and market developments for electronic communications and information society services in Enlargement countries

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This is the third monitoring report in the series of four on the electronic communications and information society sectors in Croatia, Iceland, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Albania, Bosnia & Herzegovina and Kosovo*, covering the key market and regulatory developments between July 2012 and March 2013. It also assesses progress in these nine countries in aligning national ICT policies with the goals and priorities of the Digital Agenda for Europe (DAE). The main analytical report is complemented by a detailed annex on the cross-country data.

Highlights:

- The fixed broadband market in the nine countries grew at a slower pace of just 1.4% in the first six months of 2012, compared with the growth of 10% in the full-year 2011. In June 2012 the total number of fixed broadband subscriptions stood at 10.74m, which corresponds to an average penetration of 11% of the population. Iceland reported the highest fixed broadband penetration of 34.7%, followed by Croatia with 19.9%, while the seven other countries are lagging behind.
- The number of fibre-based broadband lines in the nine countries increased more than 40% in the first six months of 2012, to total almost 650,000 connections. In Turkey, the number of fibre connections increased by more than 200,000 to approach the half-million mark. In Iceland, Albania and Bosnia & Herzegovina fibre connections now account for about 20% of fixed broadband lines.
- Incumbents continue to dominate the fixed broadband market, retaining more than 40% of lines in all countries except Kosovo, where the incumbent’s market share is below 25%.
- Mobile broadband has been the fastest growing segment of the broadband market. The use of smartphones and other handheld devices rocketed in 2012, and the mobile broadband penetration in Iceland, Croatia and Serbia has surpassed the EU-27 average of 48%.

- Only Croatia and Iceland have completed analogue terrestrial switchover and awarded the released digital dividend spectrum for wireless broadband. The former Yugoslav Republic of Macedonia is to have terminated analogue transmissions by 1 June 2013. The remaining countries gave up their initial plans for early switchover dates: Bosnia & Herzegovina postponed the switchover to December 2014 and Turkey, Albania, Montenegro, Serbia and Kosovo – to the first half of 2015.
- Electronic communications legislation based on the EU 2009 regulatory framework is now in place in Croatia, Albania and Kosovo. Bosnia & Herzegovina is the only country with legislation not aligned with the EU 2003 framework. In most of the countries, the current institutional frameworks fall short of ensuring an adequate level of independence for the national regulatory authorities in accordance with the requirements of the EU 2009 framework.
- For many of the available ICT and DAE indicators, only Iceland is generally far above the EU-27 average and can be compared with Denmark and Sweden, whereas other countries are lagging behind. The percentage of individuals regularly using the internet ranges from 38% in Turkey to 58% in Croatia, whereas the respective indicator in Iceland is 95%, well over the EU-27 average of 69% and also above the DAE target of 75% by 2015. Internet services for buying online are used by 4% of individuals in the former Yugoslav Republic of Macedonia, 9% in Turkey, 14% in Serbia, 23% in Croatia and 54% in Iceland - which is again above the EU-27 average of 44% and above the DAE target of 50% by 2015.

* *This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo declaration of independence.*

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